Core Competencies for Virtual Reference*

Reference Service Core Competencies lists the skills necessary to provide quality customer service via the virtual reference network. These include knowledge of e-resources and databases; advanced Google searching skills; proper uses of Wikipedia; and using proper, professional customer service skills.

Ask Here PA staff will exhibit the following eight core competencies:

- Ability to conduct an effective online reference session, including the creation and use of scripted messages;
- Online communication skills and etiquette for chat, e-mail, and other online communication;
- Understand availability and use of statewide e-resources;
- Ability to perform advanced Google searches;
- Understand structure of Wikipedia, appropriate uses of it, and be able to communicate this to patrons;
- Ability to assist online customers in applying critical thinking skills in locating, using, and evaluating information;
- Ability to apply reference transaction policies in an online environment (e.g., scope of service, time limits, obscene callers, harassment); and
- Understanding and use of virtual reference software, including creation of policy pages, scripts and URLs, and the assignment of descriptive codes to completed sessions.

* These core competencies were developed in conjunction with similar resources provided by QuestionPoint, Maryland's AskUsNow, Ohio's KnowItNow, Oregon's Answerland, and other statewide collaborative virtual reference services.
Ability to Conduct an Effective Online Reference Session

Conducting an effective online reference session includes clarifying the patron's information needs, identifying and delivering the desired resources in a timely manner, and confirming the relevancy of the provided information.

The virtual reference software used by Ask Here PA aids librarians in speeding up this process by including the ability to create scripted messages that can be used to greet patrons, ask general questions, and say good-bye.

For more information, see The Virtual Reference Interview, which is a PowerPoint presentation from the Ohio Library Council on conducting a virtual reference interview, located at [URL]

Online Communication Skills and Etiquette for Chat, e-mail, and other Online Communication

Interpersonal skills are extremely important when conducting an online reference interview. The following tips are taken from QuestionPoint’s Best Practices for 24/7 Reference Cooperative Sessions*:

- Create a welcoming atmosphere;
- Chat frequently, so patron doesn't have long lags without chat from librarian (no more than 1 minute should elapse without the librarian sending a message to each patron who is in session, even if it is a simple “I’m still working on your question”, or even “Still searching...");
- Show interest in the patron's question through chat tone and choice of words
- Use positive phrasing ("We can..." instead of "We don't/can't/won't...");
- Use scripts appropriately, as needed; and
- Paste small excerpts of information; avoid pasting long blocks of text in the chat.

*QuestionPoint’s Best Practices for 24/7 Reference Cooperative Sessions is available in the For Staff section of the Ask Here PA website.

Understand Availability and Use of Statewide E-Resources

Librarians staffing Ask Here PA have access to all statewide POWER Library e-resources via a unique link in the Ask Here PA policy page. Patrons should be encouraged to access the same e-resources themselves after a session by linking to them via their local public library or via an authenticated IP link in their school library. It is important to familiarize oneself with the e-resources and the available content in each resource. A complete list of the e-resources, along with their content, is available by following these steps:

2. Click the **For Librarians** link located along the bottom right-hand side of the homepage.

3. In the middle of the resulting page, click the link labeled **View a subject list of the e-resources.**

Librarians also have access to Credo Reference via a unique link in the Ask Here PA policy page. Founded in 1999, Credo Reference provides full-text online versions of about 1200 published reference works from more than 70 publishers in a variety of major subjects, including general and subject dictionaries and encyclopedias.

**Ability to Perform Advanced Google Searches**

Google is a go-to tool for both librarians and patrons to search the web. Librarians should keep in mind that patrons may have already done their "basic" Google search before coming to Ask Here PA. In light of this, librarians should do their best to become adept at advanced search tools and strategies available through Google.

One complication (or feature, depending on your perspective) with using Google is that it is always changing. This requires periodic updating of skills and changing one's search strategies. Searchers should be aware of:

- the use of quotation marks
- the wildcard operator (*)
- how to search for numbers in a range using ...
- the use of filetype: or site:, etc.
- the use of Google search as a calculator


Be creative in your search strategies and share them with patrons! Consider taking one of the Google Powersearching courses, available at: [http://www.powersearchingwithgoogle.com/](http://www.powersearchingwithgoogle.com/). The courses are made available free of charge, are self-paced and registration is not required.

**Understand structure of Wikipedia and appropriate uses of it**


The following are some tips to keep in mind when using Wikipedia.
• Understand Wikipedia's non-profit status as part of the Wikimedia Foundation
• Understand the levels of protection on articles

Good uses of Wikipedia include:

• Quick introduction to a topic
• Utilizing reference and external links
• Pop culture topics

☐ Ability to assist online customers in applying critical thinking skills in locating, using, and evaluating information

• Provide context and instruction to the patron, rather than just sharing resources or merely sending web pages. Provide enough guidance so that the patron can recreate the search if needed (include the name of links, which one the patron should click on, as well as the "clickpath"). Merely providing links to resources often will not suffice – some URLs are dynamic, such as library catalog search results, and the links that appear in session transcripts may become dead links.
• Recommend appropriate search terms and subject headings, in the context of a recommended search statement using Boolean operators. Provide examples of query constructions using basic and advanced Boolean operators.
• Help patron evaluate the sources for relevancy to the topic.

For more information, see QuestionPoint's Best Practices for 24/7 Reference Cooperative Sessions.

☐ Ability to apply reference transaction policies in an online environment (e.g., scope of service, time limits, obscene callers, harassment):

Regarding the scope of Ask Here PA, librarians should avoid giving their personal opinions or making comments about the matter of the customer’s question. This does not include the small amount of self-disclosure that a librarian may choose to offer to the customer in order to build rapport with them.

Offering opinions on medical or legal questions is never appropriate. Offering “information” relating to their need, including medical and legal needs, is completely appropriate and expected.

Sessions must always be ended in a courteous manner. Customers should never be told that they have asked their limit of questions or that their “time is up.”
The anonymity of virtual reference sometimes lends itself to inappropriate behavior. Here are some suggestions for dealing with difficult customers:

- Customers who just wish to “chat” with the librarian should be encouraged to ask a specific question. If this behavior continues, the librarian may suggest that they log back on when they have a question before ending the session.
- Customers who are rude or obscene, who ask an inappropriate question, who use offensive language, or who threaten the librarian should be sent a message (scripted or not) appropriate to the situation.

To further assist librarians, please see Ask Here PA’s General Guidelines for Chat Scenarios, which is available in the For Staff section of the Ask Here PA website.

Understanding and Use of Virtual Reference Software

Ask Here PA has developed several tools to assist librarians in learning how to use QuestionPoint’s virtual reference software to handle chat sessions, push webpages to patrons, develop policy pages, create scripts and URLs, tag chat sessions for follow-up, and assigning descriptive codes to completed sessions. Ask Here PA virtual reference software training materials are available in the For Staff section of the Ask Here PA website and include the following documents:

- Ask Here PA Manual (PDF)
- QuestionPoint Chat Follow-up & Referral (PDF)
- Instructions for Practicing Using Ask Here PA
- 24/7 Reference Best Practices (PDF)
- Assigning Descriptive Codes to your library’s or Ask Here PA completed sessions

Links to OCLC’s QuestionPoint training and documentation is also available in the For Staff section of the Ask Here PA website, as well as your QP homepage.

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