Chat Reference in the Time of COVID-19: Transforming Essential User Services

Marie L. Radford[a], Laura Costello[b], and Kaitlin Montague[a]

[a] School of Communication & Information, Rutgers, the State University of New Jersey, USA

[b] Rutgers University Libraries, Rutgers, the State University of New Jersey, USA

mradford@rutgers.edu, laura.costello@rutgers.edu, kem270@scarletmail.rutgers.edu

ABSTRACT

Reference is an essential service for academic libraries, whether or not face-to-face communication is possible. This research explores the impact of the COVID-19 pandemic on academic library virtual reference services, especially live chat. Through analysis of interviews and a national survey of librarians responsible for adapting their institution's response to physical service closures and reductions, this investigation aims to understand how COVID-19 transformed chat reference, and how users responded to new and evolving services.

ALISE RESEARCH TAXONOMY TOPICS

information services; information practices

AUTHOR KEYWORDS

chat reference; user services; COVID-19; qualitative methods; surveys; interviews; academic libraries

INTRODUCTION AND PROBLEM STATEMENT

The impact of the COVID-19 pandemic on academic library services has been sudden and extensive. As many colleges and universities rapidly moved classes online, academic libraries across the U.S. swiftly switched to online only delivery of reference services (Hinchliffe & Wolff-Eisenberg, 2020). This research seeks to explore the impact of the pandemic on academic library virtual reference services, especially live chat. Through a survey and interviews with librarians responsible for adapting their institution's response to physical service closures and reductions, this investigation aims to understand how academic librarians started, continued or increased chat reference services, and how users responded to those services as face-to-face interactions became more restricted or impossible.

Chat reference is well-positioned to be a part of the continuing pandemic response plan for libraries as they seek to serve users in a variety of circumstances, but there are still questions

about what is required to ensure that chat services are prepared to meet the developing needs of libraries and their scholarly communities. This research fills a gap in the literature addressing user-facing responses to library physical closure scenarios and aims to help library administrators and librarians position chat reference services to support online instruction and research during physical service closures.

Disaster planning is not part of the core curricula for a majority of American Library Association accredited library programs (Zach & McNight, 2010) and education around leadership for maintaining user services may be even less common (Alajmi & Al-Qallaf, 2018), but the recent pandemic response demonstrates that planning for such disruptions is not only for librarians overseeing physical collections, but also for digital access and user services. This paper explores libraries' responses to an unanticipated shift in service delivery in order to contribute to the disaster planning literature for practicing librarians, as well as for Library and Information Science faculty teaching basic and advanced courses in information services.

LITERATURE REVIEW

Synchronous virtual reference services are an important part of research support in academic libraries. Since libraries began adopting these systems in the early 2000s, they have become a regular service delivery channel for libraries. Catalano et al. (2018) surveyed the websites of 100 Association of Research Libraries (ARL) member institutions and found that 91 percent offered synchronous virtual standalone chat or reference chat integrated into social media channels. There is evidence that emerging active and proactive chat delivery channels can increase the number and complexity of virtual reference transactions (Bandyopadhyay & Boyd-Byrne, 2016). Convenience is also a primary factor for those selecting virtual reference services (Connaway, Dickey, & Radford, 2011) and research has confirmed that users find chat reference easy to use and available at the point of need (Mawhinney, 2020). Fundamentally, chat reference service is well-adapted to the online-only environment compelled by physical library closures in response to COVID-19, although the accelerated transition to fully online service delivery required to "flatten the curve" (Haelle, 2020) made it challenging for libraries to rapidly transform user services.

Planning and education can help libraries transcend basic service maintenance and move toward continuity of services and preservation of mission (Halsted, Clifton, & Wilson, 2014). Since reference and instructional support are core services in academic libraries, advance planning should take place to deliver and adapt such services in anticipation of possible crises. An example of this is apparent in public library responses to hurricanes Katrina and Rita, both occurring in 2005. Zach and McNight (2010) found that libraries not only maintained essential services; nearly 30 percent of the Florida Gulf Coast libraries they studied added new information services in response to user needs during these crises. In this case, critical user needs in the moment of crisis helped shape innovative user services. The rapid library response to COVID-19 may have a similar impact on user service. This research seeks to understand how academic libraries acted to meet user service needs and expectations and to continue to provide uninterrupted and high-quality user services during the pandemic with the aim of building better

crisis response plans and educating future librarians to adapt user services in times of an unprecedented global health emergency.

This study is informed by a large body of extant literature that examines organizational communication during national and global crises. Governments and aid agencies may use social media to share information and communicate with people (Bright, 2011), often to enhance situational awareness (Oh, Agarwal, and Rao, 2011). Digital platforms such as Twitter afford opportunities to provide real-time information that fosters partnerships between various actors such as governments, communities, and individuals (Panagiotopoulos, Bigdeli, & Sams, 2014). However, such communications may be rife with misinformation, and researchers caution that digital platforms should be one part of a larger work plan given their vulnerabilities (Panagiotopoulos et al., 2014). Further, Mahrt and Puschman (2012) point out that people's interactions with online platforms during crises may benefit from direct interactions and discussion.

Crisis communication literature that focuses on responses to global disasters tends to focus on social media use above other forms of digital communication, such as live-chat encounters (e.g., Abdulhamid, Ayoung, & Kashewfi, 2020). Limited work that engages with libraries centers how librarians use platforms like Twitter to respond to disasters such as hurricanes (Han, 2019). Soehner, Godfrey, and Bigler (2017) discuss the role of library crisis communications in the context of a library bedbug infestation. In this case, chat reference served both as a method for providing accurate information in one-to-one encounters and as a way to provide services during library treatment closures. Jaeger, Langa, McClure, and Bertot (2007) also mention chat reference as one of the many myriad ways Gulf Coast public libraries communicated with patrons and aid agencies during the 2004/2005 hurricane season. Limited literature addresses how virtual reference might function during global crises such as the COVID-19 pandemic.

Further, this study is theoretically grounded in Goffman's (1967; 1959) work in relational communication, facework, and impression management. Connaway and Radford (2011) and Radford (2006) applied Goffman's framework to LIS problematics and found that live chat reference is concerned with building virtual relationships in addition to responding to information or instructional needs. The relational, affective aspects of service were also found to be critically important to users of live chat reference. This theoretical approach allows space for investigating the relational dimension of the user experience. For example, to focus on questions such as: In times of crisis, what is the relationship between information and relational needs? How might reference encounters transform during crisis situations? What impact did the COVID-19 pandemic have on the interpersonal communication behaviors of users and librarians?

RESEARCH QUESTIONS

As a result of the literature review in LIS and in crisis communication, as well as taking a theoretical stance from Goffman (1967;1959), the following research questions were developed: RQ1 What has been the impact on academic live chat reference services due to the COVID-19 pandemic?

RQ1a. What plans/policies did libraries have in place for crisis planning for reference services, including virtual services? Were these adequate?

RQ1b. What changes have libraries put in place regarding virtual reference services to respond to the pandemic?

RQ2 How have questions to live chat reference services changed during the pandemic?

RQ3 What changes have taken place, if any, during the pandemic in the experience of live chat reference encounters, especially relating to relational aspects from the viewpoint of librarians and service users?

METHOD

To investigate the above research questions, a mixed methods design has been used with two simultaneous data collection methods: a) 25-30 semi-structured qualitative interviews with academic librarians who have direct responsibility for live chat services during the COVID-19 pandemic (e.g., Heads of Reference, Heads of Chat Reference Services, Associate Directors for User Services); and b) a national survey aiming for 250-300 academic librarians directing or engaged in live chat services during the coronavirus pandemic. Both interview and survey participants will include university, college, and community college librarians. Interview participants will be recruited through a snowball sampling technique, personal contacts, and from academic library listservs, and will be compensated with a $30 gift card for their time. Survey participants will be recruited through academic librarian listservs, library websites, and snowball sampling. They will be compensated by being entered into a random lottery for four $50 gift cards.

The 25-30 interviews will be conducted by three interviewers, via phone or video conferencing (i.e., Skype or Zoom). Interview questions will focus on what changes have occurred in academic library chat services since March 2020, due to the COVID-19 pandemic, including staffing, professional practice, hours of operation, frequency and types of reference questions. They will also focus on relational dimensions relating to their experience and that of the service users. The interviewers will record the responses using Zoom recording, Skype transcription, or note taking.

The survey will be developed using Qualtrics software. It will contain demographic and quantitative, as well as open-ended qualitative questions focusing in the same areas as the interview questions

Data analysis for the interviews and the qualitative survey questions will be done inductively via the constant comparative method (Charmaz, 2014) and NVivo software, using iterative open coding to identify themes and illustrative quotations. Quantitative data analysis, including descriptive statistics, will be computed through use of Qualtrics and SPSS software. Data collected from this mixed methods design will triangulate findings, to ensure greater validity and trustworthiness of results. This research is in progress with data collection for the survey and interviews taking place concurrently. The data analysis and write up of the full paper will be completed by fall 2020.

CONCLUSION

The disruption to academic library reference service caused by the COVID-19 pandemic has been unprecedented in modern U.S. history. The closure of university buildings to protect staff from infection has dramatically curtailed in-person reference suddenly and for an indeterminant time. Virtual reference, including live chat services, offers a well-developed and robust alternative to face-to-face interactions when such communication is dangerous or restricted. The implications of COVID-19 for the library profession and librarian education are significant. Incoming and current academic librarians must have the preparation and leadership skills to manage rapid service transitions in times of crisis. It is important that academic librarians maintain user-facing services, support their institutions, strive for equitable service, and demonstrate sensitivity and compassion to individuals in the midst of stressful situations. This research will chronicle this unprecedented closure of physical library spaces across America and document how those managing live chat reference responded to the pandemic and how they strove to transform and maintain essential service to academic users struggling to adapt to a new, totally online, educational reality.

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