

Facets of Quality for Digital Reference Services

Version 5

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This document outlines important characteristics and features (referred to as facets of quality) for building a digital reference service for all audiences, including the K–12 educational community. The facets are intended as a set of standards for organizations to achieve in creating and maintaining digital reference services participating in the Virtual Reference Desk (VRD) Network [a collaborative Internet-based question and answer service providing support to digital reference (or AskA) services by accepting out-of-scope and overflow questions], but can be applied to all digital reference services and consortia. (See [Additional Resources](#) for further discussion of the Facets of Quality.)

Background

The original facets of quality were identified by the 1997 Virtual Reference Desk Expert Panel. The list was based upon panel members' experiences in managing and coordinating exemplary digital reference services. This list has been revised to include results of discussions of the 1999 Expert Panel and October 13, 1999 AskA Consortium Meeting. (See <http://vrd.org/training/facets.html> for previous version of "Facets of Quality for K-12 Digital Reference Services.") Revisions were made in June 2003 based on internal review and upon consultation and advice from Jo Bell Whitlatch, Ph.D.

The facets are divided into two main categories: *user transaction* and *service development/management*. The user transaction category includes those components that occur during the question-answering process (i.e., accessibility, prompt turnaround, clear response policy, interactive, and instructive); these features are generally visible to the user. The service development/management category involves decisions made in creating and maintaining the service that affect overall quality and user satisfaction (i.e., authoritative, trained experts, private, reviewed, provides access to related information, and publicized).

Levels of Quality

Digital reference services differ from each other in many aspects including policy and procedure, subject matter expertise, and available resources. For this reason, it is important that quality criteria accommodate the wide range of possibilities of various services and their readiness to meet certain expectations. Each "facet" is presented at two different levels:

- Essential - Required for network membership
- Recommendations – current state and goals of membership

To be included in the VRD Network all services must fulfill the essential level of requirements for each facet of quality. The recommendations level represents a wide range of possibilities and reflects the current state and goals to which all AskA services in the network will strive to achieve over time.

The following section presents each facet of quality, its definition, and its levels of participation.

User Transaction

1. **Accessible:** Digital reference services should be easily reachable and navigable by any Internet user regardless of equipment sophistication, physical disability or language barrier.

Essential: Ensure that the service is reachable and navigable by either e-mail or Web-based query forms.

2. **Prompt Turnaround:** Questions should be addressed as quickly as possible. Actual turnaround time depends on a service's question-answer policy and available resources (e.g., staffing, funds, technology, etc.).

Essential: Respond to at least 10% of incoming questions within two business days.

3. **Clear Response Policy:** Clear communication should occur either before or at the start of every digital reference transaction in order to reduce opportunities for user confusion and inappropriate inquiries.

Essential: Create and adhere to a clear response policy.

4. **Interactive:** Digital reference services should provide opportunities for an effective reference interview, so that users can communicate necessary information to experts and to clarify vague user questions.

Essential: Encourage sharing of important user information such as age or grade level and question subject-area either through a Web-based query form or follow-up e-mail communication.

5. **Instructive:** Digital reference services provide access to current information and expertise. Quality digital reference services offer more to users than straight, factual answers; they guide them in how to formulate questions, subject knowledge, and information literacy.

Essential: Offer answers or pointers to information in responses to users. When unable to provide an answer, provide the user with appropriate notification.

Service Development and Management:

6. **Authoritative:** Experts of a digital reference service should have the necessary knowledge and educational background in the service's given subject area or skill in order to qualify as an expert. Specific levels of knowledge, skill and experience are determined by each service and its related discipline or field.

Essential: Ensure that the service staff includes at least one qualified expert who can oversee the quality and accuracy of staff responses.

7. **Trained Experts:** Services should offer effective orientation or training processes to prepare experts to respond to inquiries using clear and effective language and following service response policies and procedures. Training of information specialists is one of the most important aspects of planning and operating a digital reference service.

Essential: Provide some training procedure for all AskA service staff, even if informal.

8. **Private:** All communications between users and experts should be held in complete privacy.

Essential: Deny public access to user names, e-mail or mailing addresses, and questions unless there is written notice prior to the information being made available, such as on a Web-based query form.

9. **Reviewed:** Digital reference services should regularly evaluate their processes and services. Ongoing review and assessment help ensure quality, efficiency, and reliability of transactions as well as overall user satisfaction.

Essential: Periodically monitor responses to users for quality, accuracy, adherence to service policy, and to improve skills.

10. **Provides access to related information:** Besides offering direct response to user questions, digital reference services should offer access to supporting resources and information. Services can reuse results from question-answer exchanges in resources such as archives and frequently-asked questions (FAQs).

Essential: Include basic resources on the Web site to supplement the question-answering component.

11. **Publicize:** Services should inform potential users of the value that can be gained from use of the service. A well-defined public relations plan can ensure that services are well-publicized and promoted on a regular basis. Publicity should not create more demand than the service has capacity to handle.

Essential: Create and post publicly a description of the purpose and practices of the service.

Conclusion

It is clear that there is a need for standards as digital reference evolves from a handful of AskA services and a set of experiments in libraries to a common means of interacting with users. These facets of quality provide an example of standards of operation for digital reference services in a cross-domain environment. It is hoped that these standards will be adopted in growing reference consortia, or used as a model for the development of new digital reference standards.

Additional Resources on Facets of Quality

Bennett, A. B., A. Kasowitz, and R. D. Lankes (2000). Digital reference quality criteria. In R. D. Lankes, J. W. Collins III, and A. S. Kasowitz (Eds.), *Digital Reference Service in the New Millennium: Planning, Management, and Evaluation* (pp. 69-80). New York: [Neal-Schuman Publishers](#).

Kasowitz, A., B. Bennett, and R. D. Lankes (2000). Quality standards for digital reference consortia. *Reference & User Services Quarterly*, 39(4), 355-63.

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