

THE REFERENCE INTERVIEW

The Reference Interview

- ▶ The reference interview is also referred to as reference interaction or reference dialogue
- ▶ The reference interview is a conversation between the library user and librarian in which the librarian's objective is clarification and understanding of the user's question as a means to meet the user's information need, and the user's objective is to have the librarian understand and meet the information need.
- ▶ “Conversation between a member of the library reference staff and a library user for the purpose of clarifying the user's needs and aiding the user in meeting those needs. “

(Bopp & Smith, p. 47)

The Reference Interview

- ▶ This dialogue is a two way communication between the user and the librarian in which both contribute to the process

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Types of queries

- ▶ **Directional.** The location of something is being asked (support staff also handle routine and directional questions, signs for some of these questions, but they remain a most commonly asked category)
- ▶ **Quick reference.** Ready reference and one-step process; factual questions can be answered by handy or nearby reference materials. The answer may require a departure from the reference desk, but the question is clear, concise and requires no further consultation with the patron before the answer is quickly found.

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- ▶ **Search.** The first step is the clarifying the questions in a reference interview and the second step is finding the answer.
- ▶ The question is factual in nature but nonetheless requires searching a number and variety of sources or for a complete answer requires more than one source.

The Reference Interview

- ▶ **Research.** Simple search elaborated. The question is less factual and more subject or topic-oriented in nature. The reference interview clarifies the information wanted but finding the answer may involve instruction, a variety of sources and whatever additional information is needed (referral to outside sources). Library subject guides and instructional handouts are helpful for answering frequently asked research questions.

The Reference Interview

- ▶ The user brings the question and the understanding of what is needed
- ▶ The librarian brings an understanding of the available resources and asks questions to understand the query and match the identified need with available resources
- ▶ In order for an information need to be met, the reference librarian must understand the user's query in totality
- ▶ In most instances, it is only the user who can determine if a need has been met, the reference interview therefore, starts and ends with the user
- ▶ Some reference questions are straightforward and do not require a high degree of interaction between the reference librarian and the user to be successful. Others require a great deal of negotiation.

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- ▶ The reference interview involves a number of steps as follows: initial conversation/greeting, initial query and negotiation, searching, communicating results, follow up and closure.

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Initial conversation

- ▶ A simple greeting such as “Hi, how may I help you?” will establish that the librarian is available to help the user and allay any fears that he or she is in the wrong place or that the librarian is busy.
- ▶ Tone should, of course, be pleasant. Professionalism dictates that librarians sound enthusiastic about providing assistance
- ▶ Each user should be treated as a new and interesting interaction.
- ▶ Library and clientele will dictate the formality of the greeting, and telephone greetings are often a little more formal than in-person.
- ▶ With experience, a reference service provider can learn to adapt his or her communication style to one more consistent with the user’s preferences.

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Question Negotiation

- ▶ The librarian should encourage the user to talk freely about the question and information he/she needs
- ▶ The user should do most of the talking while the librarian should genuinely listen so that the librarian can understand the real information needs
- ▶ What the user asks may not be the real question basically because:
 - ▶ The inquirer may feel that he/she is in a strange land and has no idea of how the librarian will react to his/her query
 - ▶ The inquirer has no understanding of the language of the system and hence he/she expresses her inquiry in a language familiar to him/her

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Question Negotiation

- ▶ The questioning process seeks to
 - (1) elicit the user's question in his or her own words;
 - (2) make information available that the librarian needs to understand the inquiry to an extent that enables effective searching and accurate provision of information; and
 - (3) verify that the librarian and user share the same understanding of the information need.

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Question Negotiation

- ▶ Question negotiation is important because it helps in establishing what the user wants and its only after that establishment that the search process can begin.
- ▶ Several communication strategies are used during the question negotiation stage; open questions, closed questions, encouragers and active listening

Open questions

- ▶ Open questions seek to elicit descriptive answers from the user and express their information need using their own words/terms
- ▶ Open questions are important in clarifying a need because the user may not provide everything that the librarian needs to know in order to meet the information need

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Open questions cont'd

▶ Examples of open questions:

1. What materials have you already examined?
2. What do you already know about the topic?
3. When you say [topic], what do you mean?
4. I'm not sure if I know what [topic] is/means. Could you tell me some more about it?

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Open questions cont'd

- ▶ At times, the user's question may be unfamiliar, and the open questions will seek to draw out more explanation as well as inform the librarian about the topic area.
- ▶ An example of this is the user who says, "I need to write a paper about Lasagne."
- ▶ An open question to ask here might be "Could you tell me more about Lasagne? What field of study does that relate to?"
- ▶ If the librarian is comfortable doing so, it is okay to let the user know if terms are unfamiliar; it is better to ask for clarification than to blunder ahead without direction.

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Closed Questions

- ▶ Closed questions ask for a yes or no response or present the user with options from which to choose.
- ▶ Closed questions tend to focus narrowly and distinctly on a particular subject or source and help further the librarian's understanding of the user's information need.
- ▶ Closed questions are asked after the open questions to avoid leading the user in a particular direction or narrowing the options too soon.
- ▶ Even if the user's initial question is very broad or not yet well-formed, it is the user who needs to decide and define the information need.
- ▶ Users view librarians as the authorities on information and may think that the information they want is not available if the suggestions given are not what they have in mind.

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Closed Questions cont'd

- ▶ After the user's topic is known, often the librarian needs to know more before searching for an answer.
 - ▶ How much information does the user need?
 - ▶ Is he or she interested in articles or books, or does it matter?
 - ▶ Is there a particular time period for the information: recent or historical?
- ▶ Users often do not know what is available from the library and will try to match their question with what they think they will be able to find.
- ▶ When presented with a list of options, users may be hesitant to say something that is not on the list, even if that is what they want.
- ▶ It is good practice when presenting a list to leave an "other" option

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Active Listening and Encouragers

- ▶ Good communication involves both getting the message across and understanding what the other person is saying
- ▶ The use of active listening techniques helps ensure not only that the message is received accurately but also that it was understood.
- ▶ In order to turn hearing into listening, one must focus on what a person is saying, pay attention to what is said, and concentrate on understanding.
- ▶ So a mere restatement of the perceived message is not enough.

The Reference Interview

Active Listening and Encouragers

- ▶ Active listening involves not only paraphrasing but also asking clarifying questions and understanding the nature of the problem fully before attempting to assist with the user's information need.
- ▶ Feedback from the user, then, is also an essential element of active listening.
- ▶ With straightforward questions, the librarian may simply need to paraphrase the question before beginning the search.
- ▶ In more complex questions, however, the librarian may need to renegotiate the question several times during the interview and the search process.

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Active Listening and Encouragers

- ▶ Noncommittal acknowledgements of what the user is saying indicate that one is listening and seem to encourage the user.
- ▶ These types of open question are sometimes called “encouragers.”
- ▶ These questions overtly encourage the users to more fully reveal their information needs.
- ▶ Questions such as “Can you tell me more about this topic?” and even short questions such as “Yes?” or “Okay, what else?” can be very effective ways of getting the user to further explain the question so that the librarian can begin thinking about where to start in the search for an answer.
- ▶ Nonverbal encouragers can include head-nodding, eye contact, and facial expressions that match what the speaker is saying.
- ▶ Encouragers help the librarian to see the question as much as possible from the viewpoint of the user and to gain more insight into the background that produced the question.

The Reference Interview

Searching

- ▶ Once the user's information need has been ascertained, the search process can begin
- ▶ During the search process however, the librarian can continue to ask questions, refining what the user wants and adjusting the search strategy accordingly.
- ▶ This can be a helpful approach particularly when the user has been uncertain about their need, when the user has declined to narrow a broad topic, or when there is a lot of available information on a topic.
- ▶ Searching is also a joint process between the librarian and the user
- ▶ A basic principle for most situations is that the search process should be transparent for the user, so that the user can see and understand what the librarian is doing.
- ▶ This keeps the dialogue open and allows the user to offer further information and the librarian to continue to ask questions.
- ▶ What form and extent of the collaboration is affected by the reference environment

The Reference Interview

Searching

- ▶ In most environments, the librarian should explain the search process as it is happening when possible and appropriate
- ▶ One of the most effective ways to involve the users is to work alongside them at a table with reference books or at a computer with access to the library's databases
- ▶ In this way, users can be instructed how to search and can provide immediate feedback as to the relevance of what has been found
- ▶ Sometimes searching is done without the user present, and this presents its own set of challenges in the reference interview.
- ▶ Ideally, more of the communication must be done up-front, and then communication should be continued when the results are presented to the user, to avoid constant back-and-forth by telephone or delays in the searching while waiting for the user to return
- ▶ In the search process, knowing the kind of answer the user is expecting can help guide the selection of the tools or resources that will provide that kind of answer.

The Reference Interview

Presentation of Answers

- ▶ When the question has a definite factual answer, the answer should be given to the user and a source for the information provided.
- ▶ Authority is an important aspect of information.
- ▶ If the user was not present during the searching part of the process, some communication regarding what was done to find the information (search terms, other sources consulted) may be presented as well.
- ▶ Although the early stages of the reference interview ideally would have determined the scope of the information need, presentation of answers is always a good time to verify that the information presented is what was expected.
- ▶ The user continues to think about the question during the search process and may need supplementary information or may have changed from the original question slightly.

The Reference Interview

Presentation of Answers

- ▶ The librarian should thus verify that the answer matches the scope of the user's question and that the level or amount of information given is what was desired

The Reference Interview

Closing and follow up

- ▶ Closing the reference interview properly is important because it is the last communication with the user and can affect the way that the user remembers the entire interaction.
- ▶ The end of the reference interview should always leave open the opportunity for the user to say more.
- ▶ Asking, “Does this completely answer your question?” or “Is there anything else that I can help you with?” gives the user the opportunity to ask for further information or to say that something different is required than what was found.
- ▶ An invitation to return is a pleasant reminder that the librarian is always available to assist users with their information needs
- ▶ Sometimes the librarian/library will not have the answer that the user needs, in such a case, its appropriate to refer the user to a person, library or organization that would assist them, should conditions warrant

The Reference Interview

Closing and follow up

- ▶ Follow up is also an important aspect of the reference interaction
- ▶ If the user remains in the library, it is a nice touch for the librarian to follow up with the user to confirm that the information was adequate and nothing else is required.
- ▶ In a corporate setting, or one where librarians have a close connection with their remote users, a follow-up telephone call may achieve the same end.
- ▶ In other settings, this type of follow-up would seem intrusive, so whether to do this is at the discretion of the librarian, based on how it fits with the library environment.