

THE REFERENCE INTERVIEW Or, *What I Thought You Said Was...*

Elements of an Effective Reference Interview

Setting the scene – it's your ballpark!

Finding the answer – by asking the right questions!

Providing follow up – don't let anyone leave without it!

Setting the Scene – Be Approachable!

- ✓ Show sincere respect and courtesy
- ✓ Use positive body language
 - ◆ Smile, greet
 - ◆ Eye contact (recognizing cultural differences)
 - ◆ Appropriate body positioning
 - At eye level, whenever possible
 - Appropriate physical spacing
 - Turning toward, not angling
 - ◆ Relaxed body posture
- ✓ Relaxed tone of voice—moderate speed, sincere
- ✓ Animated and responsive
- ✓ Listen—focus full attention on person
- ✓ Go with patron whenever possible—**no pointing!**

What Prevents Effective Communication?

- ✓ Patron's discomfort in the library

- ✓ Patron's inability to express need clearly

- ✓ Physical/emotional problems

- ✓ Physical barriers
 - ◆ Confusing physical arrangement
 - ◆ Counter vs. desk as service point
 - ◆ Service point location
 - ◆ Signage

- ✓ Patron's lack of knowledge about the topic

- ✓ Librarian's lack of knowledge on the topic

- ✓ Complexities of the language
 - ◆ Multiple meanings of words
 - ◆ Words with different meanings for the two speakers
 - ◆ Interpreting according to our own background and knowledge



TEN COMMANDMENTS FOR REFERENCE LIBRARIANS

THOU SHALT BE CURIOUS by showing an interest in a variety of subjects, by reading widely and by tackling new technology without fear.

THOU SHALT BE ENTHUSIASTIC by loving thy job, by boosting others' morales and by believing, "I have the *best* job because it is mine."

THOU SHALT BE OUTGOING by appearing approachable, by overcoming any shyness or hesitancy and by exhibiting warmth and friendliness.

THOU SHALT BE ENERGETIC by getting off thy behind instead of pointing at shelves, by developing a consistent speed to get the job done and by leaving personal problems at home.

THOU SHALT BE DEDICATED TO SERVING OTHERS by going the extra mile, by noticing patrons' needs and by treating everyone with respect and dignity.

THOU SHALT BE TOLERANT by maintaining objectivity when selecting or disseminating information, by realizing that the library is neutral ground and by accepting all patrons as they are.

THOU SHALT BE COURTEOUS by keeping thy cool at all times even whilst patrons rant and rave.

THOU SHALT BE GENUINE by stifling all plastic smiles and by exuding a willingness to help through body language and that "special" look in thine eye.

THOU SHALT BE LEVELHEADED by coping with emergencies, by managing time well and by developing organization and ability to handle a number of patrons simultaneously.

THOU SHALT LIVE BY THE GOLDEN RULE by treating thy patrons as thou would wish to be treated.

What the Librarian Should Learn in the Interview

- ✓Exact topic
- ✓What is needed about the topic
- ✓Why the information is needed
- ✓Type of material expected
- ✓Amount of information needed
- ✓When information is needed



“Reference service isn’t about finding the right answers. It’s about asking the right questions.”

Asking the Right Questions

- ✓Use open-ended questions to start the interview
 - ◆Open-ended questions invite the patron to talk (ask how or what)
 - ◆Open-ended questions cannot be answered by “yes” or “no” or by “this” or “that”

YES



NO

Reasons for asking open-ended questions:

- ✓To help the patron get to the point
- ✓To help the patron to air his/her views
- ✓To clarify issues and ideas
- ✓To help the patron to be more specific

Examples of open-ended questions:

“What kind of information on _____ are you looking for?”

“What would you like to find out about _____?”

“Would you tell me more about _____?”

“Where did you hear about _____?”

“Could you be more specific?”

“How much detail do you want?”

“Could you describe the kind of information you would like to have?”

“When did _____ live?” “What did _____ do?”

Use Closed Questions To Verify The Information:

✓Closed questions require only a “yes” or “no” answer or a choice between two suggestions, “this” or “that”

✓Use closed questions to:

- ◆Limit conversation
- ◆Reach a decision about choices
- ◆Summarize thought
- ◆Check understanding of need
- ◆As follow-up to determine whether the need has been met

Examples Of Closed Questions:

“Are you saying that _____?”

“Are you looking for _____?”

“Is that the kind of information you are looking for?”

“Do you mean that _____?”

“Can you use _____?”

“Would you rather have a _____ or a _____?”

“Is this the kind of information you are looking for?”

Disadvantages Of Closed Questions Early In The Interview:

- ◆ They prematurely restrict the patron's explanation of the need
- ◆ They leave the librarian in control, which can lead the patron away from the real need
- ◆ They set the librarian up as the expert
- ◆ They force the patron to respond in a certain way

Paraphrasing Or Verifying

- ◆ If the interview has been awkward or unclear in any sense, it is wise to verify your understanding of the need by restating what you believe it to be.
- ◆ Paraphrase or restate the need as you understand it and ask the patron to respond to your closed question—"Is that what you are looking for?"

Sample Interview "A"

Patron: Have you got anything on Honda Accords?

Librarian: What type information do you want on Honda Accords?

Patron: You know, how they rate. I'm thinking of buying one, but somebody told me the Toyota Camry is a better car.

Librarian: Would you like something that compares the two models?

Patron: Yes. That would be great.

Sample Interview "B"

Patron: Do you have anything about children's safety seats in cars?

Librarian: What kind of information do you need on children's safety seats?

Patron: Well, you see, I've got to make this report in class.

Librarian: What is your report about?

Patron: Death and injury rates. You know how they have changed.

Librarian: Perhaps statistics that compare death and injury rates now and prior to passage of the law. Is that what you have in mind?

Patron: Yes. That would really help.

Librarian: Is there anything else you need for your report?

Patron: Yes, whether all states have laws requiring them. And how much safer it would be if airlines required them.

Librarian: Is your report about why airlines should require safety seats for children?

Patron: Yes. That's what it's about. I want to show how children are safer in cars because of them, and how airlines should require them too.

Librarian: Your report is about how the use of safety seats for children on airlines could reduce the injury and death rate in much the same way that it has in cars. Is that your topic?

Patron: Yes! That's it.

Follow-Up or Closure

It's important for the librarian to learn whether the need has been met!

Sample closure questions (when patron is using the material in the library):

- ✓ “Does this completely answer your question?”
- ✓ “Do you need any other information?”
- ✓ “Is this the kind of information you had hoped to find?”
- ✓ “How did that work for you?”
- ✓ “Is there anything else I can help you with today?”

Sample closure statements (when the patron is checking out material to use outside the library)

- ✓ “If these materials don't work for you, please let us know and we'll try to find something else.”
- ✓ “If you find this doesn't completely answer your need, come back and we'll continue to look.”
- ✓ “Please let me know if you don't find what you need.”
- ✓ “I need to assist some other patrons, but please come find me if you need any more help.”
- ✓ “Is there anything else I can help you with today?”

TELEPHONE REFERENCE SERVICE

Also see: Ohio Reference Excellence on the Web – Telephone and Email Reference
www.olc.org/ore/3phone.htm



Barriers to Understanding

- ◆ Both parties are unable to “read” the other’s body language
- ◆ The telephone distorts words; it is easier to make mistakes in hearing
- ◆ It is difficult to determine the kind and level of information needed

Answering the Telephone

- ☎ Remember that those in the library have a prior claim on your time
- ☎ Identify the library and yourself (if it is your library’s policy to do so)
- ☎ Put warmth and friendliness into your voice
- ☎ Speak clearly and not too fast; rapid speech may sound curt
- ☎ Use simple, straightforward language
- ☎ Avoid library lingo
- ☎ Use open-ended questions as you do in a face-to-face interview
- ☎ Clarify your understanding of the need
- ☎ Verify spellings

Providing Answers

- ✓If the search could take more than two or three minutes, ask to call back with the answer. Give the patron some idea of when you might call back

- ✓Warn the patron if you plan to leave the phone for more than two or three minutes

- ✓Adhere to the library's policy concerning types of questions answered over the phone and limits on the amount of information that can be read

- ✓If the data is lengthy, ask the patron to come in to use the information

- ✓Identify the source of the information before giving it

- ✓Make sure the patron understands the answer

- ✓Offer to spell difficult words or names

SUPERCALIFRAGILISTICEXPIALIDOCIOUS

Skills Needed by Virtual Reference Librarians

- Application of critical thinking skills
- Commitment to learning and motivation
- Enthusiasm
- Etiquette
- Communication skills
- Good customer service skills
- Multi-tasking
- Quick on their feet
- Online reference interview skills
- Keyboarding proficiency
- Comfortable with technology
- Coping with technical glitches
- Customizing scripts
- Chat skills
- Collaborative browsing
- Internet searching
- Database searching
- Knowledge of electronic resources
- Knowledge of copyright law
- Application of policies in an on-line environment (and the ability to create)
- Ability to evaluate success
- Training in the use of platforms and software (tutorials, seminars, practice)

Evaluating the Virtual Reference Interview

Keep these aspects in mind while answering a virtual reference question:

1. How long was the wait overall?
2. Did the librarian introduce her/himself?
3. Did the librarian conduct a reference interview?
4. What was the librarian's attitude while helping you?
5. What resources were recommended?
6. Were the resources useful?
7. Did the resources answer your question?
8. Was additional help offered?
9. How was this reference service successful?
10. What could be improved?

An Example of an Average Virtual Research Question & Answer*

Date: 11/30/08 01:20:16 PM

Workgroup: reference

Question: Are there any Christmas performances in Columbus?

=====

This is the conversation you had with our agent:

[1:20:16 PM] Shaunda has joined the room

[1:20:16 PM] librarian01 has joined the room

[1:20:16 PM] librarian01: **Hello. You've connected to your 24x7 online reference service staffed by librarians across the state. Please wait one moment while I take a look at your question.**

[1:20:39 PM] librarian01: Hi! Let me check and see what I can see for you....

[1:20:48 PM] Shaunda: Thank you

[1:21:18 PM] librarian01: Take a look at this page:

<http://columbusoh.about.com/od/events/a/holidayevents.htm>

[1:22:12 PM] Shaunda: This looks good. Are there any sort of street dancing or performances hosted anywhere?

[1:22:39 PM] librarian01: Hmmmm let me take a look!

[1:23:31 PM] librarian01: I found stuff in Chicago, but not in columbus.

[1:23:46 PM] Shaunda: Well, thank-you.

[1:24:00 PM] librarian01: Sure! I hope you find something fun to do!

[1:24:07 PM] librarian01: **Is there anything else I can help you with?**

[1:24:20 PM] Shaunda: That's it for now. Have a great day.

[1:24:25 PM] librarian01: You have a great day too!

[1:24:30 PM] librarian01 has left the room

[1:24:31 PM] Shaunda has left the room

***Bold type** indicates scripted responses.

EXERCISE - The Reference Interview

Use open-ended questions--ones that cannot be answered “yes” or “no”, “this” or “that”—to answer the following questions. Try to use a different question for each request.

☒ Do you have anything on Stacher’s Disease?

☒ I need something about World War II.

☒ Have you got a section on AIDS?

☒ Do you have anything on tenant’s rights?

☒ I’m looking for a discussion on animal rights.

☒ Do you have any books on Jimmy Doolittle?

☒ Where’s your health section?