The Reference Interview & Referrals

ACCESS SERVICES TRAINING SESSION I
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WEDNESDAY, MARCH 28, 2012
The Reference Interview

• DEFINITION: *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, 37).
The Reference Interview

• The reference interview helps you *discover* the patron’s actual information need

• Patrons seldom tell you their real and/or specific need

**EXAMPLE**
A patron asking for the anthropology books may actually need articles on Japanese marriage rituals

**TIP**
Apply the reference interview to all questions you receive at the desk.
Why don’t patrons “just ask”?

Patrons may...

- Not be sure of what they need
- Not be sure how to ask for what they need
- Not be sure of what resources they library has
- Not want to seem stupid
- Need to “size you up” and find out how friendly/approachable/knowledgeable you are
- Have privacy issues—difficulty discussing personal problems with strangers
The Effective Reference Interview

- Requires the staff member to show:
  - Approachability
  - Interest
  - Listening/inquiring
  - Searching
  - Follow-up
About Approachability

- Don’t do anything so engrossing that you seem unavailable. *Why?*
  - *Most people won’t want to disturb someone who seems too busy*
- Be friendly and welcoming. *How?*
  - *Smile, make eye contact and greet the patron*
- Acknowledge people who are waiting? *How?*
  - *Indicate that you will be able to help in a moment*
    - *(ex. “I’ll be right with you!”)*
  - *Ask other desk staff to help if they’re available*
About Interest

- **Focus your attention on the patron. *How?***
  - *Face them when speaking and listening*
  - *Maintain eye contact*
  - *Signal your understanding of their needs both verbally and non-verbally (make brief comments, nod your head)*
  - *A simple smile can be encouragement for the patron*

- **Be respectful, cordial, and encouraging. *Why?***
  - *It may take the patron some time to compose their question*
About Listening & Inquiring

- Let the patron finish asking their question before responding
- Ask open ended questions to encourage the patron to be more forthcoming
- Clarify the information need
  - “Do you need a list of everything Sigmund Freud wrote?”
  - “Are you looking for a specific book by Freud?”
  - Consider asking the patron if they have their syllabus
- Repeat the question *before* you start looking
Why ask open questions?

- Open-ended questions provide an opportunity for the patron to talk to you about their information need.

- Open-ended questions guide the patron in the direction to best help you find the material meeting their information need.

**EXAMPLE**

"Please tell me more about your topic."

"What do you need to know about cancer."

**TIP**

Open questions cannot be answered with “yes” or “no.”
Why restate the question?

- Reassures the patron that you are listening
- Reassures the patron that you heard correctly
- Patron may clarify or expand the original request with more information
About Searching

- Find out what the patron has already tried. *How?*
  - *Ask who they’ve talked with, where they’ve looked...*
- Find out the patron’s time frame. *How?*
  - *Ask if the paper is due next day, next week or next month*
- SHOW them how you are looking for or finding their answer. *Why?*
  - *We are here to teach them how to do this themselves*
  - *Showing them how you are looking also ensures you are looking for what they want/need*
About Follow-up

- Ask the patron if their question has been completely answered or if they have enough information or direction to continue on their own.
- Encourage them to return for further assistance if needed.
- Watch for their body language, if they look doubtful, just ask again. (“Are you sure?”)

**EXAMPLE**

“Does this answer your question completely?”
“Is this enough information to get you started?”
“Is there anything else I can help you find?”

**TIP**

Don’t be surprised if the conversation continues after your follow-up question.
Reference Interview Review

- Remember....
  - Approachability
  - Interest
  - Listening / inquiring
  - Searching
  - Follow-up
The Reference Referral

- Following the reference interview, any question you cannot answer becomes a reference referral.

REFERENCE REFERRAL OVERVIEW

* Refer the question to the RIS Staff member or GLA on the desk
* Refer the question to the on-call Librarian
* Refer the question to the appropriate liaison
* Refer the question to the General Reference email: genref@unt.edu (copy the patron in on the email).
Making the Referral

- It can be uncomfortable telling a patron that you don’t know how to help them.

- So make the referral a positive experience for the patron and for you.

- OR, you can start off with the referral but give them something to get them started.

EXAMPLE REFERRALS

“‘I’m having difficulty with your request so I’d like to have you talk with the staff member on duty who has more experience searching for the kind of information you need.”

OR

“Although I’ve only been able to find basic information for you, I know that a subject liaison can help you find the more detailed information you need. I’m going to email your request and copy you on the mail. A subject liaison will contact you directly” (OSUL).
The Reference Interview

Role Playing Scenarios
Reference Scenario

Patron approaches the desk slowly; The patron seems hesitant.

What should you do?

TIP
Remember “approachability”
Don’t appear too busy; be friendly and welcoming.
Reference Scenario

YOU SHOULD:

Stop what you are doing, make eye contact and greet the patron.

“Good Morning. How can I help you?”
Reference Scenario

Patron:

“Hi. I’m wondering if you can help me find some articles for my paper?”

What should you do?

TIP
Remember “interest, listening, inquiring”
Face the patron, wait until they finish asking their question and then ask questions to gather more information.
Reference Scenario

YOU SHOULD:

Ask open-ended questions to gather more information

“Can you tell me about your topic?”
“What is your paper about?”
Reference Scenario

Patron:

“I’m looking for articles on eating disorders.”

What should you do?

**TIP**

Remember “interest & inquiring”
Even if you don’t know much about the topic, show interest. Continue to ask questions to gather more information.
YOU SHOULD:

Ask another open-ended question to gather more information (this is a big topic).

“Is there any particular aspect of the topic that interests you?”
Reference Scenario

Patron:

“Well...I’m kind of interested in how college students deal with eating disorders – maybe the kinds of treatment options available?”

What should you do?

TIP
Remember “inquiring” Continue to ask questions to refine the inquiry.
Reference Scenario

YOU SHOULD:

Ask clarifying questions.

“Is your instructor requiring you to use scholarly journals? Can you use magazine and newspaper articles?”
Reference Scenario

Patron:

“We can use anything but we have to have at least two scholarly articles.”

What should you do?

TIP

Repeat the question
Let the patron know you’ve been listening.
YOU SHOULD:

Repeat the question.

“OK...you are interested in articles about treatment options for college students dealing with eating disorders and you need at least two scholarly sources.”
It’s time to search.

What should you do?

**TIP**
Remember we are here to teach students search skills. *Show* them how you are searching for articles.
YOU SHOULD:

Talk about the resource you will start with and have them follow along.

“We’re going to start our search in the article database, Academic Search Complete. It includes articles from many scholarly journals along with magazines and newspapers. You can follow what I’m doing on the monitor.”
Reference Scenario

Patron:

“These articles are great. Thanks!”

What should you do?

TIP
Remember “follow-up”
YOU SHOULD:

Ask a follow-up question.

“Does this information fully answer your question?”

“Is this enough information to get you started?”
Reference Scenario

Patron:

“Yes. Wait, how do I use the online library catalog?”

What should you do?

TIP

Remember “clarify”
Also the reference interview is a “conversation” – there will be some back and forth discussion before it is over.
Reference Scenario

YOU SHOULD:

Clarify this new request; the patron originally asked only for articles.

“Do you need to find books for your project?”
Reference Scenario

Patron:

“Yes. We need to find at least one book for our project. I also heard I can search WorldCat to find books at any library and if the library does not have the book I want, I can get it through Interlibrary Loan”

What should you do?

TIP
Again “clarify”
Time frame is important.
YOU SHOULD:

Ask about project due date.

“Today is Wednesday. When is your paper due?”
Reference Scenario

Patron:

“The paper is due on Friday.”

What should you do?

TIP

Be respectful and cordial
YOU SHOULD:

Explain that the catalog may be more useful.

“The Library catalog will allow you to find books in our library right now. You can request materials from other libraries using Interlibrary Loan, but you would not have them by Friday.”
Patron:

“That’s fine. I didn’t know about the catalog. How do I find it?”

What should you do?

TIP

“Show” what you are doing
YOU SHOULD:

Show the patron how to access and search the catalog.

“You can follow along on the monitor... the catalog can be accessed from the library website. We’ll do a quick search on your topic right now.”
Reference Scenario

Patron:

“Great. Thanks very much.”

What should you do?

TIP
Remember “follow-up”
YOU SHOULD:

Ask follow-up questions again.

“You’ve got books and articles now for your project. Is this enough information to get you started? Are there any other kinds of material I can help you find?”
Reference Scenario

Patron:

“This should be fine. I’ve got enough to get me started. Thank you very much.”

What should you do?

TIP
Remember “follow-up”
YOU SHOULD:

End the session; provide offer of continued assistance.

“You’re welcome. The desk is open until midnight, so please contact us if you have other questions.”
CONGRATULATIONS!

YOU’VE JUST MADE IT THROUGH YOUR FIRST REFERENCE INTERVIEW!
References


(Slides adapted from Oregon State University Library Reference Interview Skills for Student Workers).