# Reference: A Professional Practice Strategy Designed by Librarians

# Factors That Influence the Success of a Reference Interview

- The environment
- The questioner (knowledge, abilities, perceptions, etc.)
- The question
- The mode
- The professional (knowledge/skills, perceptions, attitudes, etc.)
- Communication between the questioner and the professional

# Let's Talk About Your Interactions

- In-Person Reference
  - Type & size of library
  - Any additional background
  - Proxy use issues?

- E-Reference
  - Type of library
  - Circumstances/ background
  - Proxy use issues?

# What Happens First?
# Getting the Professional's Attention

# Ross et al: PACT.  Increasing comfort (& trust) at the beginning.

- Am I in the right place?
- Are you available to help me?
- Have we made contact? E.g., "Are you listening and willing to help me?"
- Have you understood my topic in general?

Ross & Dewdney

WtoR Early Findings: Impact of Staff Activity When Initially Approached
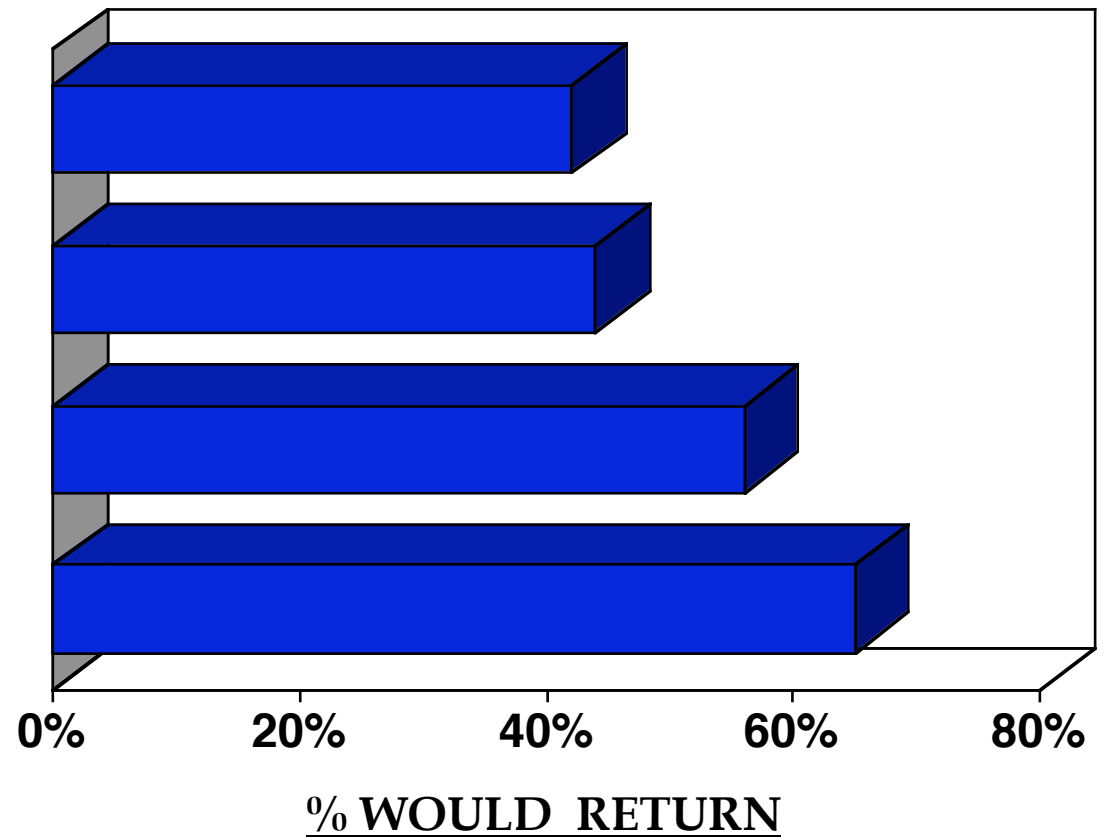
# *What happened at the VERY BEGINNING of the interview—Q IV on form:*

- In-Person Reference

  – Examples of your question and what happened after you asked the question.

- E-Reference

  – Examples of your question and what happened after you asked the question.

# From Your Worksheets, Let's discuss:

- How approachable was the staff member? (in person) Q1
- To what extent were you acknowledged. Q2
- How approachable was the staff member? (e-reference)
- To what extent were you acknowledged.

# Did you experience any good open questions?
## (Checklist Q 3) In Person or E-Ref

- How can I help you today?

- What have you done so far?

- What would you like to know about X?

- What kind of help would you like?

- What else can you tell me about X?

- What would help you?

- What would you like to know about X?

- Can you tell me more about this problem?

- If you could have exactly the help that you wanted, what would it be?

- How would this help you?

- How do you plan to use the information [you just asked for]?

# From Your Worksheets.  Let's discuss:

Inclusion approaches at the reference desk or in the electronic environment (Checklist Q4)

- *Inclusion. Did the librarian take steps to include you in what (s)he was doing?  How?*

  - *At the reference desk?*
  - *In the electronic environment*

# Identifying Problem Areas (Which, BTW, Can Be Fixed)

Cartoon of "Conan the Librarian" removed.

# Pointers

Cartoons of "pointing librarians" removed.

# Did you experience any of these less effective staff actions?

- Answering **exactly** the question that was asked; various system centered responses.
- **Truncating** responses such as pointing-- 'It's over there.' or "We don't have what you want."
- **Intimidating** behavior
- Poor listening skills **(suggesting lack of interest)**
- **Failure to involve** questioner;
- Making **assumptions** about the question
- **Lack of knowledge** of resources and systems
- **Failure to verify** (follow-up)

# From Your Worksheets

- Identify the Most Problematic Actions/Responses in the In-Person Interaction

- Identify the Most Problematic Actions/Responses in the E-reference Interaction

Now The Positive: Let's look at qualities or behaviors that we've found are moderately successful

# WtR Staff Factors Associated With **Moderately Successful** Reference Interviews (60-69%)

| %<br>Would<br>Return | FACTOR | %<br>of All<br>Staff |
|---|---|---|
| 63% | Staff member identified by name | 14% (484) |
| 63% | Librarian used instruction | 15% (128) |
| 65% | Librarian was free at beginning | 28% (480) |
| 66% | Interaction lasted  5-9 minutes | 24% (485) |
| 66% | Open q was first response | 28% (484) |
| 68% | Interaction lasted 9-14 minutes | 8%  (485) |

# Factors Associated With **Successful**
# Reference Interviews (70-80%)

| %<br>Would<br>Return | FACTOR | %<br>of All<br>Staff |
|---|---|---|
| 70% | Negotiated very successfully | 16% (128) |
| 76% | Asked a follow-up question | 25% (484) |
| 79% | Lasted more than 15 mins | 3%  (485) |
| 80% | Was very approachable | 28% (480) |
| 80% | Showed a moderate interest | 30% (485) |

# WtR Factors Associated with **Very Successful** Reference Interviews

| %<br>Would<br>Return | FACTOR | %<br>of All<br>Staff |
|---|---|---|
| 91% | Very interested in question | 19% (485) |
| 92% | Very good listening skills | 22% (484) |
| 94% | Found the need behind question | 18% (482) |
| 96% | Very effective open questions | 10% (451) |

# From your worksheets, let's discuss:

- *How effective was the staff member's diagnosis of what you needed? (Cklist Q6) (18% in our study)*
    - *In the in-person interaction?*
    - *In the electronic interaction?*

For the record, how many of your librarians asked you a follow-up question? (Cklist Q7) (25% in our study)
    - *In the in-person interaction?*
    - *In the electronic interaction?*

# From Your Worksheets

Identify the **Most Effective** Staff
Behaviors/Actions You Observed:

- *In the in-person interaction?*
- *In the electronic interaction?*

# The Key Question:
# Would You Return?

**In-Person**

__YES

__NO

__NOT SURE

**E-Reference**

__YES

__NO

__NOT SURE

# Finally, overall, how successful was each interaction? (QV)

| IN PERSON | E-REFERENCE |
|---|---|
| 1 Not successful | 1 Not successful |
| 2 | 2 |
| 3 So-so | 3 So-so |
| 4 | 4 |
| 5 Very successful | 5 Very successful |