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

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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

STAFF ACTIVITY

- Doing work at desk
- Work away from desk
- With another user
- Unoccupied

% WOULD RETURN

0% 20% 40% 60% 80%
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)
Pointers

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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
<table>
<thead>
<tr>
<th>% Would Return</th>
<th>FACTOR</th>
<th>% of All Staff</th>
</tr>
</thead>
<tbody>
<tr>
<td>63%</td>
<td>Staff member identified by name</td>
<td>14% (484)</td>
</tr>
<tr>
<td>63%</td>
<td>Librarian used instruction</td>
<td>15% (128)</td>
</tr>
<tr>
<td>65%</td>
<td>Librarian was free at beginning</td>
<td>28% (480)</td>
</tr>
<tr>
<td>66%</td>
<td>Interaction lasted 5-9 minutes</td>
<td>24% (485)</td>
</tr>
<tr>
<td>66%</td>
<td>Open q was first response</td>
<td>28% (484)</td>
</tr>
<tr>
<td>68%</td>
<td>Interaction lasted 9-14 minutes</td>
<td>8% (485)</td>
</tr>
</tbody>
</table>
## Factors Associated With Successful Reference Interviews (70-80%)

<table>
<thead>
<tr>
<th>% Would Return</th>
<th>FACTOR</th>
<th>% of All Staff</th>
</tr>
</thead>
<tbody>
<tr>
<td>70%</td>
<td>Negotiated very successfully</td>
<td>16% (128)</td>
</tr>
<tr>
<td>76%</td>
<td>Asked a follow-up question</td>
<td>25% (484)</td>
</tr>
<tr>
<td>79%</td>
<td>Lasted more than 15 mins</td>
<td>3% (485)</td>
</tr>
<tr>
<td>80%</td>
<td>Was very approachable</td>
<td>28% (480)</td>
</tr>
<tr>
<td>80%</td>
<td>Showed a moderate interest</td>
<td>30% (485)</td>
</tr>
</tbody>
</table>
WtR Factors Associated with **Very Successful** Reference Interviews

<table>
<thead>
<tr>
<th>% Would Return</th>
<th>FACTOR</th>
<th>% of All Staff</th>
</tr>
</thead>
<tbody>
<tr>
<td>91%</td>
<td>Very interested in question</td>
<td>19% (485)</td>
</tr>
<tr>
<td>92%</td>
<td>Very good listening skills</td>
<td>22% (484)</td>
</tr>
<tr>
<td>94%</td>
<td>Found the need behind question</td>
<td>18% (482)</td>
</tr>
<tr>
<td>96%</td>
<td>Very effective open questions</td>
<td>10% (451)</td>
</tr>
</tbody>
</table>
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?*
<table>
<thead>
<tr>
<th>In-Person</th>
<th>E-Reference</th>
</tr>
</thead>
<tbody>
<tr>
<td>YES</td>
<td>YES</td>
</tr>
<tr>
<td>NO</td>
<td>NO</td>
</tr>
<tr>
<td>NOT SURE</td>
<td>NOT SURE</td>
</tr>
</tbody>
</table>
Finally, overall, how successful was each interaction? (QV)

<table>
<thead>
<tr>
<th>IN PERSON</th>
<th>E-REFERENCE</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 Not successful</td>
<td>1 Not successful</td>
</tr>
<tr>
<td>2</td>
<td>2</td>
</tr>
<tr>
<td>3 So-so</td>
<td>3 So-so</td>
</tr>
<tr>
<td>4</td>
<td>4</td>
</tr>
<tr>
<td>5 Very successful</td>
<td>5 Very successful</td>
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