SI 643 - Professional Practice in Libraries and Information Centers, Winter 2009

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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

**STAFF ACTIVITY**

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

<table>
<thead>
<tr>
<th>Staff Activity</th>
<th>% Would Return</th>
</tr>
</thead>
<tbody>
<tr>
<td>Unoccupied</td>
<td>80%</td>
</tr>
<tr>
<td>With another user</td>
<td>60%</td>
</tr>
<tr>
<td>Work away from desk</td>
<td>40%</td>
</tr>
<tr>
<td>Doing work at desk</td>
<td>20%</td>
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</tbody>
</table>

% WOULD RETURN
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.

Copyright 1992 Richard Lee
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%)

<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>
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</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>
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</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>
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</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?*
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)

<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>
</tr>
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