

On-the-Go

A Circulation Clerk's Guide to Easy,
Four-Step Reference Interviews
by C. Michael Hall

While not every librarian is a reference librarian, virtually everyone who works in libraries, in any role, for any meaningful length of time *will* conduct a reference interview, even if it's never called by that name. In simple terms, a reference interview is:

The verbal exchange that occurs when a library patron asks a library staffer for assistance meeting an informational need.

When the patron asks your help in locating materials, this initiates a discourse. That discourse is the reference interview. Conducting an effective reference interview takes practice. It also helps to have both talent and training on your side, which is why reference librarians are so good at what they do.

Anyone can learn to conduct a basic reference interview, though. As with many tasks, all it requires is breaking the process into steps while considering some variables.

Step One

Greet the patron.



Step One: Greet the patron.

It's a simple thing, but how often it's forgotten! "Finding everything you need today?" "What can I track down for you?" "Something special you're looking for?" How you greet someone doesn't matter...just be sure you greet them! Remember, patrons often feel sheepish when asking reference questions. The topic might be embarrassing or ideologically sensitive, or the patron might feel silly for not being able to find their own materials. Make it painless! Making the patron feel welcome, conveying your willingness and desire to be of assistance, helps put the patron at ease.

Step Two

Define the question/problem.

Step Three

Refine the question/problem.

Step Four

Deliver the materials.



Step Two: Define the problem/question.

Many reference queries aren't phrased as effectively as they ought to be. You must use your experience and instinct to unearth the question the patron is really trying to ask. In most situations, your goal is to put their question into terms that will enable you to do an effective catalog search on the patron's behalf.

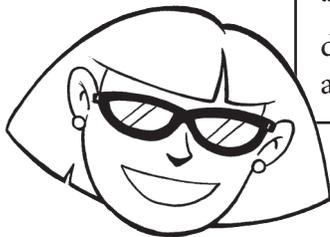
Here's an example of an actual reference question:

"I need a book specifically on military decorations."



Words like "specifically" *should* make our jobs easier, but in truth, they're so often misused that they serve little purpose. The question the patron asks isn't necessarily the question the patron intends to ask. People don't always use words in exactly the way words are intended to be used, or with absolute clarity. We're a colloquial culture!

The patron in this example might mean a couple of different things. To better understand what he needs, re-state the patron's question in ways that aren't quite so subject to interpretation:



"When you say 'specifically,' do you mean you'd like books about specific decorations, or do you mean you need books on military decorations and nothing else?"

We've responded to the question with questions of our own. This is how we "decode" what the patron *really* means when they make a query.

In the actual incident that inspired this example, it turned out the patron was interested in researching the Silver Star. As you can see, the patron's question was quite different than the one he first expressed. He needed much more specific information than he initially requested, and he needed some coaching to ask the question he really wanted to ask!

This process can take some time. People have wildly varying levels of skill and confidence when it comes to verbal communication, and many linguistic interactions are non-literal. It can take a number of re-statements to eventually define the patron's question/problem. Be patient. Listen for clues in the patron's language choices, and pay attention to vague terms that could say many different things.



"I need books on what Politician X has been up to."



Note the language choice here: "...has been up to." This is a patron looking for works scrutinizing, even criticizing Politician X's performance. A biography is probably not what this patron wants or needs; neither is a survey work on politics.

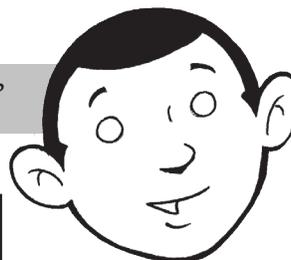
“Do you have any books on law?”



This is a vague question. Law is a complex subject, and literally thousands of pages on law are published every year. What kind of law? Civil? Criminal? Business?



“I’m interested in comics.”



Homonyms are lots of fun. When a word has multiple meanings, it's useless without context. Does this patron want comic books and graphic novels, or does he want books by/about comedians and comedic actors?

When we start dissecting the research question this way, we often find we've moved directly to the next step...

Step Three: Refine the problem/question.

Most reference questions are too general. By refining the question, we end up asking a better, more focused question.

Granted, plenty of patrons can find what they're looking for when you direct them to a section and get them shelf-browsing (depending upon the size of your library), but that's the bare minimum of reference help...and by “bare minimum,” I mean “not enough.” It's not good customer service. Most patrons with reference questions will benefit a great deal from narrowing their query, and they'll need your help to do it.

We touched on this in Step Two when we talked about vague language. “I'd like to read about old movies” is a question that *might* be addressed by a survey work on cinema, but the patron will be much more satisfied with works pertaining directly to their interests. That survey work at the top of your search results may spend a great many pages discussing the Silent Era and/or New Hollywood, which is all well and good--unless what the patron *really* wanted was information on the classic Hollywood studio system. Narrow down the query when possible. This will help you direct patrons to resources that address their needs as exactly as possible.

You will go back-and-forth between Steps Two and Three during the course of a reference interview. As you refine a question (Step Three), you might find it leads back to redefining a question (Step Two), then refining this whole new question (Step Three). This loop can occur a number of times, and that's perfectly normal. You're not going in circles; you're getting closer to the patron's actual research question. This looping system is how we work around the inexactitude of modern language!

Eventually, you'll hit upon the exact question the patron wants to ask. Once you do, you're ready for Step Four...

Step Four: Deliver the materials.

This is the part where you get materials into the patron's hands.

Make your materials suggestions based on their potential to be useful. Ask the patron how they'd like to proceed: explain how and why you had them narrow the question/problem, and how that might influence the patron's information needs. This is not only a "teachable moment," it's your chance to find out how to present the patron with the information resources they need. Do they want to start with a general work so that next time, they'll have a better understanding of the broader topic? Or will the specialized resources spotlighted by the reference interview suffice? Different patrons interface with new information in different ways. It's up to you to make sure your patrons know you can help them interface with said information in whatever way works best for them.

Once the patron has what they're looking for, you might find it useful to ask the patron for some feedback...a "quality assurance" survey, if you will. Your library might have comment cards for patrons to fill out. Alternately, you can create a survey form for reference clients to fill out. This kind of feedback is a useful tool for further development of your reference interview skills.



In-depth reference interviews can take a good long while, and should be handled by appointment with trained reference librarians. Obviously, the circulation desk is no place for a comprehensive reference interview--the kind you'd need to conduct for a patron doing, say, a semester's worth of college-level research; that would impede the flow of traffic and be a grave disservice to other patrons.

However, these basic tips should have demystified the reference interview process just enough that when people come to your circ desk with informational needs, you'll not only be able to send them to the right place, you will be able to do so with confidence they're *en route* to finding the exact resource they need!