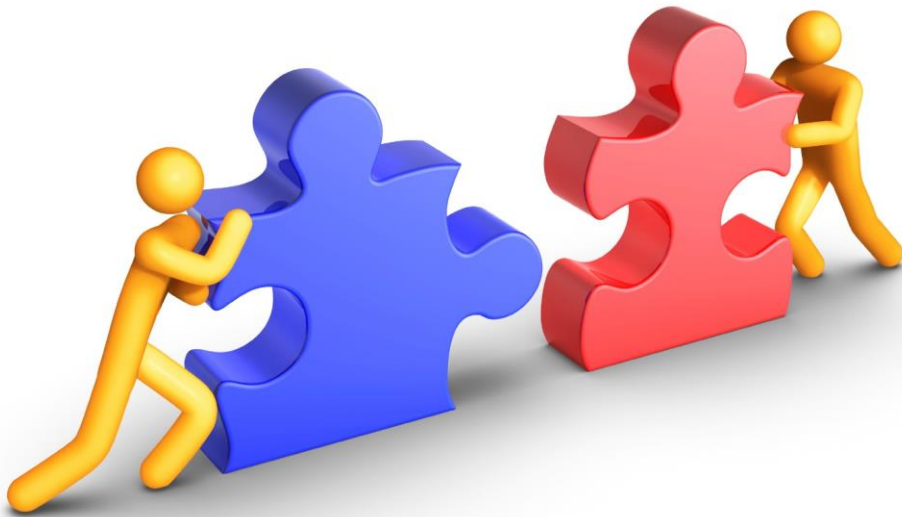




THE REFERENCE INTERVIEW

SYRACUSE UNIVERSITY
School of Information Studies

MODELS



- Conversation
- Dialogue
- Partnership
- Listening and Communicating
- Clarification and Understanding
- Demonstration of Concern and Interest
- Negotiation

RELEVANT STANDARDS

RUSA Guidelines for Behavioral Performance of Reference and Information Services

- 1.0 Visibility/Approachability
- 2.0 Interest
- 3.0 Listening/Inquiring
- 4.0 Searching
- 5.0 Follow-Up



Reference and User Services Association

YOU WILL DEVELOP YOUR OWN STYLE.



Edgy



Hipster



Preppy

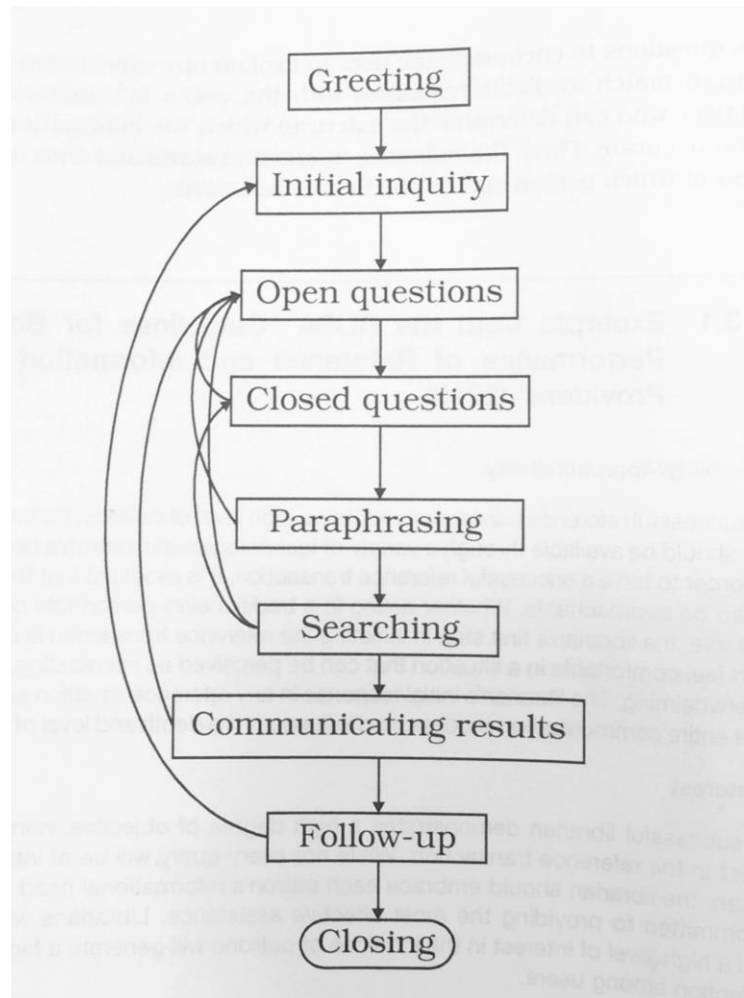


Streetwear



Boho

ITERATIVE PROCESS



INTERACTION AND DIALOGUE

- User brings question and understanding of what is needed.
- Librarian brings understanding of resources, questions to encourage user explanations.
- User determines the extent of relevance, accuracy, or utility of found information.
- User is the closer of the transaction, not the librarian.

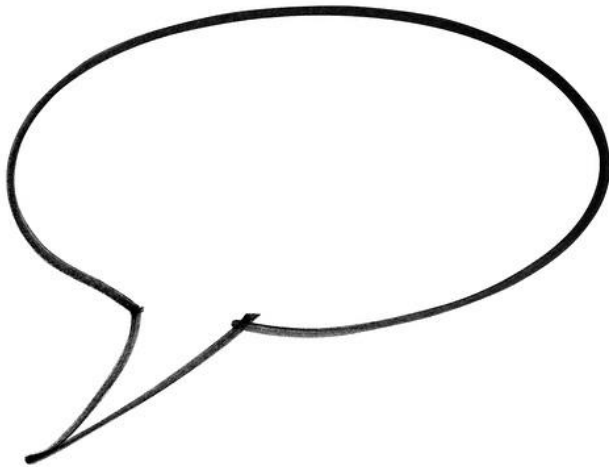


GREETING AND ENGAGING

- Welcoming, enthusiastic demeanor
- Smile, eye contact, nod, verbal greeting (**Hi, how may I help you?**)
- Not involved in other work
- Full attention; active listening
- Acknowledge those waiting for assistance
- Body language (open stance, forward lean, matching eye level)
- Environmental language (remove clutter, keep fingers away from keyboard/pen/etc.)
- Affirming verbal language (**I see, okay, makes sense**, etc.)



NEGOTIATING USER'S NEEDS



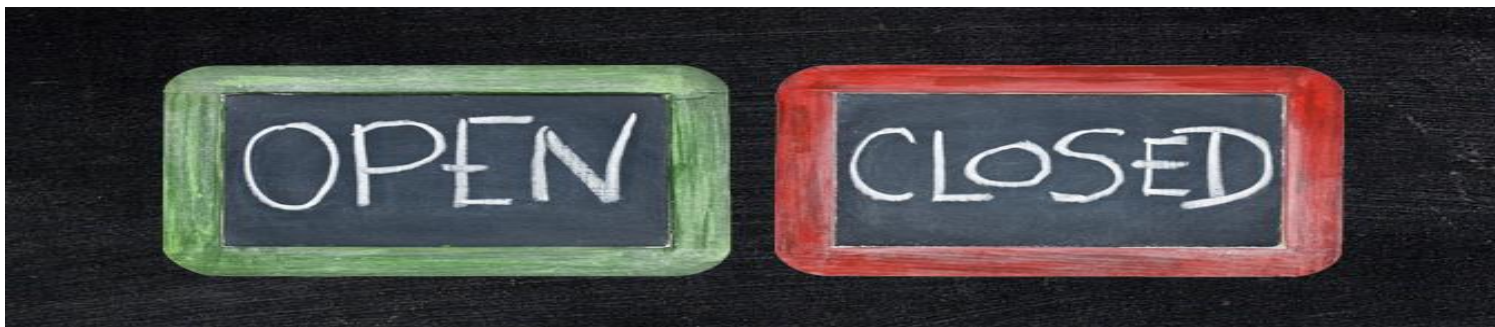
By questioning, the librarian seeks to:

1. Elicit the question in the user's words
2. Discover what the user already knows in order to search for and evaluate information
3. Verify that the librarian and user share an understanding of the information need

Then you can start the search process!

COMMUNICATION STRATEGIES

- Open questions
 - Closed questions
 - Encouragers
 - Active listening
- Users describe their need
- Ensure the librarian conveys interest, concern, and attention



ENCOURAGERS

- Yes?
- Okay, what else?
- Can you tell me more about that?
- Nonverbal: eye contact, nod, facial expression



ACTIVE LISTENING

- Focus on what the user is saying; pay attention to their words.
- Paraphrase what the user said in your own words; ask user whether or not you have understood fully.
- Ask clarifying questions
- Stay open to user feedback.
- Be prepared to renegotiate the question several times.



WHAT DO YOU NEED TO KNOW?



- Who is the user?
- What is the question?
- When does the user need the information?
- Where has the user already looked? Or where did the user learn about the topic?
- Why is this question being asked? What purpose will it serve?
- How much, and what type of, information is needed?

OPEN QUESTIONS

Questions that have no fixed answer, cannot be answered by yes/no or a “multiple choice” set of options; usually begin with what, when, where, or how:

Do you have something specific in mind?

What part of [topic] are you interested in?

What do you already know about [topic]?

Could you tell me more about [topic]?

How much (or what kind of) information are you looking for?



MORE OPEN QUESTIONS

- **ELICIT**—What sort of thing are you looking for? What information would you like on this? What sort of material do you have in mind? What requirements do you have for your (project, task, etc.)?
- **DESCRIBE**—What have you done about this question so far? Where did you hear about this? What did your teacher/manager/etc. tell you about this topic (if an imposed query)?
- **ELABORATE**—What aspect of X concerns/interests you? What else can you tell me about X?
- **CLARIFY**—What do you mean by X? What would be an example of that? Can you/please give me an example. Can you help me to understand X?

CLOSED QUESTIONS

Used only after the user topic is known; questions can be answered by yes/no or a “multiple choice” set of options:

- Are you interested in [topic 1] or [topic 2]?
- Do you want advanced material or something more basic?
- Do you need books or articles?
- Are you looking for current or historical information?
- Do you need the information today or can you wait for an interlibrary loan?
- Have you had a chance to get started yet? What have you done with this question so far?

NEUTRAL OR SENSE-MAKING QUESTIONS

Questions to use when more direct phrasing might offend the user; elicit why the information is needed and to what use the information will be put:

- If you're comfortable telling me the kind of problem you're working on, I will get a better idea of what would help you.
- If you can tell me more about how you want to use the information, I should be able to give you more useful information.
- I can help you better if I know something more about how you will use this information.
- Looking at these resources, which do you think will be most useful to you?
- What would a "perfect" source that answers your question completely be like (or be titled)? If you can describe it, I can be more helpful in finding it.
- We have a lot of different materials on X in various parts of the library. I may be able to help you better if you could tell me more about X.

SENSE-MAKING QUESTIONS

- ENCOURAGE—What are you working on? How did this question arise? What happened that you need to know this?
- PERSPECTIVE—What problem are you having in this situation? Where would you like to begin? Where do you see yourself going with this?
- GAP ASSESSMENT—What kind of help would you like? What are you trying to understand? What would you like to know about X? Where did you get stuck with this project/task?
- IDENTIFY HELP—What would help you? What would you like to see happen in this situation? If you could have exactly the help you want, what would it be?

PARAPHRASING OR SUMMARIZING THE NEED

paraphrase

After using open, sense-making, and closed questions, paraphrase or summarize your understanding of the information need.

- So you're looking for . . .
- What you need is . . .
- You mean . . .
- As I understand you . . .

. . . followed by your summary of the information need. Be concise; don't change the meaning.

- Is that it?
- Is that what you wanted?

THE SEARCH

- Search process should be transparent for the user; user should be able to see and understand what the librarian is doing.
- Restate the need; describe what steps will be taken and why; then explain the search process as it is happening
- Keep dialogue open, request user feedback on process and findings; be open to renegotiating the need, question, etc.
- Work alongside the user, rather than in opposition to them.
- Look for “teachable moments” (opportunities for instruction).

CLOSING AND FOLLOW-UP

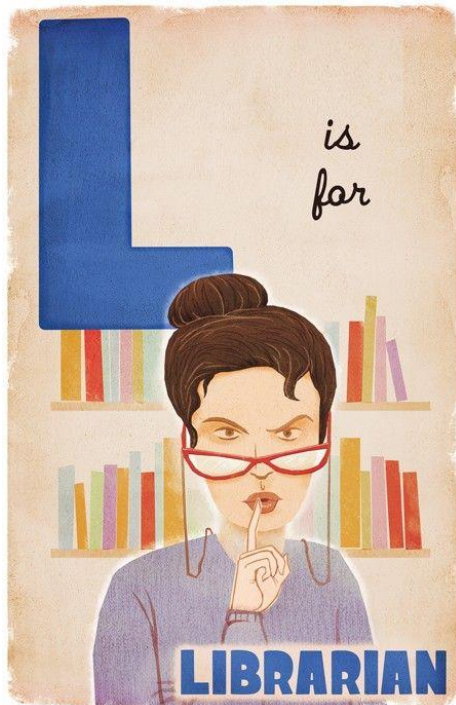
- Close the interview with an invitation to say more, reopen the process, start over, etc.
- Does this completely answer your question?
- Is this the kind of information you were hoping/expecting to find?
- Is there anything else I can help you with today?
- If you don't find what you're looking for in these resources, please come back [and here's how to do that].
- When you see the user again: Did you find everything you were looking for?

REFERRALS

- When a search is unsuccessful, refer users to another person, library, organization, etc.
- Confirm (with a phone call or another method) that the referral destination is appropriate and will not be a dead end.
- Offer to make the “handoff” to the referral destination.



NEGATIVE CLOSURE



What happens when a librarian was unsuccessful and did not make an appropriate referral, the interaction went poorly, or the librarian could otherwise not complete the interaction successfully:

- Pointing or other vague responses
- Not conducting a reference interview; taking user queries at face value
- Working without asking questions or providing explanations
- Implying the user should have done something else before asking for reference assistance
- Trying to get the user to accept information that is more easily found but falls short of their need
- Signaling the interaction is over by turning away or otherwise encouraging the user to go away

MORE NEGATIVE CLOSURE



- Providing an unmonitored referral and not checking that the source suggested is both available and appropriate
- Warning the user to expect defeat; claiming the information does not exist (in the library or otherwise), too hard to find, too obscure, too elusive, etc.
- Referring the user somewhere else, preferably far away
- Encouraging the user to abort the transaction voluntarily
- Stating explicitly that the search has reached a dead end
- Telling the user that s/he's going away to track down a resource but not returning
- Sending the user to Google

IMAGE CREDITS

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