The Reference Interview:

How to improve: teaching and the reference interview: and virtual reference interviews

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Abstract

The Reference Interview is an essential part of the library. When a patron enters the library, the reference staff is usually the first person a patron sees. Thus, learning how to complete a Reference Interview effectively in various settings should be prioritized. Since anyone in this position needs to be familiar with different sources, have good search strategies, highly developed interpersonal communication skills, teach students good search strategies and research skills. In virtual reference interviews, this is important because while it is similar to the traditional reference interview, doing each step is different. It is also necessary for LIS students to learn how to conduct Reference Interviews effectively. This paper aims to analyze, comment, and reflect on the author's views over multiple scholarly articles and other materials from the course Access to Information on topics of the reference interview. These topics were reviewed to improve the traditional and virtual reference interviews.

**Introduction**

This paper discusses materials and scholarly articles on the topic of reference interviews. Since the Reference Interview is an integral part of the library, learning to complete an Interview effectively in various settings should be a priority for any librarian. It is equally vital for students in the MILS program who have limited experience conducting Reference Interviews.

I focused on three main subtopics. These are teaching the process of interviewing, improving the reference interview and virtual reference interviews. All articles used were from 2010 to today. Other materials from INF 6120 Access to Information course are discussed in subtopic one.

**Subtopic One: Improving the Reference Interview**

Learning how to improve the Reference Interview was interesting since, until recently, I was unfamiliar with this topic. I wanted to learn a good basis for conducting one. Knowing how to do a successful reference interview in any library position is necessary. Reading these articles, I learned a lot about improving the Reference Interview. Engaging with patrons during the interview process is important for learning their information needs. I also learned how to improve my interpersonal communication skills.

A reference position requires familiarity with different reference sources, sophisticated search strategies, highly developed interpersonal communication skills. Reference staff are the library's face and are typically the first staff members a patron sees (Curry 2016). Librarians need exceptional Reference Interview skills for answering a patron's queries, allowing patrons to become self-sufficient. The Reference Interview is an essential part of the library’s services. Without a good Reference Interview, it is hard to provide the information and discourages patrons from using the library again. Making sure they are done correctly is vital to avoid errors. However, there are multiple ways to improve the Reference Interview. The articles for this section are *The Reference Interview in the Google Age, Reference Interviews: Getting Things Right, The importance of Effective Interpersonal Communication in Reference Interview in Academic Libraries in Nigeria, Consumer Health Reference Interview: Ideas for Public Librarians,* and *Is the Reference desk used for reference interviews*.

The authors' views were shown in their suggestions for improving the Reference Interview. Some of their tips are to use a checklist of steps for completing a Reference Interview and know specific information sources to answer questions on certain topics like health. Librarians should be mindful of the implications of their services. They need to be adequately prepared since many users may rely on the given information (Luo 2015). Consulting with other librarians may be helpful if a question is too complex or asking open-ended questions to get more details on the query to avoid giving the wrong information. Also, be aware of patrons' needs and literacy levels. Providing different sources may help patrons comprehend the materials (Luo 2015). Some patrons may be reluctant to share certain information they feel is stigmatized. Being attentive, neutral, using discretion, and respecting privacy are good qualities to gain the trust and acceptance of patrons (Luo 2015). Librarians must regularly engage or actively invite the users to talk about their reasons for what they are looking for (Boyum I., Bystrom K., & Pharo N 2021).

The author's information on Interpersonal communication was explained. These skills are essential tools for librarians to understand users' queries and meet patron information needs (Posigha., Etebu, & Godfrey,2018). Interpersonal communication is interacting simultaneously and mutually influencing each other, usually for maintaining relationships. The accuracy in meeting the information needs of researchers and different categories of users of information depends on effective interpersonal communication between the two parties involved (Posigha Et al., 2018). If the interpersonal communication is off, the interview result may be wrong. Having good personal communication skills is the ability to be a good listener since it is more about listening to the information being communicated and understanding the speaker's emotions (Posigha Et al., 2018). This is a good thing to have in a reference interview since it helps you understand the patron's query. It also makes the message exchange easier and enhances understanding of a patrons' information needs (Posigha Et al., 2018). The best way to improve interpersonal communication skills is to treat others the way you want to be treated.

The authors also shared their information on improving the Reference Interview in virtual settings. Some of these ways are to connect with a patron since there are no verbal cues to help you. Finding ways to connect will help understand the patrons' information needs, which may otherwise be difficult. This is because the online environment does not give as many clues to the patron's needs (Curry 2016).

The articles provided lots of knowledge on interpersonal communication skills and how to improve a reference interview. The handout from the course Access to Information was more in-depth than the other articles. It provided interpersonal skills that could be used in each stage of the reference interview. Approachability, for example, uses a friendly verbal greeting to make the person feel comfortable(Anghelescu 2021). The handout was also helpful because it gave a lot of information I felt the articles did not discuss. Another handout I felt was valuable was on Reference Interview RUSA guidelines because they are helpful in conducting a successful Interview. It also included the three categories of a Reference interview: general, in person, and remote (Anghelescu 2021). Chapter 3 from the textbook *Reference and Information An introduction* ties into this topic, but it was also beneficial since it discussed something the articles did not. The Cultural context of where the interview is taking place I consider important. Since information professionals work with patrons from diverse backgrounds, they must be sensitive to differences in communication when meeting their information needs (Saunders 2020).

**Subtopic two: Teaching and the Reference Interview**

. I learned how interviewing is being taught in reference courses. I did not realize librarians might teach in an interview. The lack of articles examining how well students learn the Reference Interview was surprising. Due to the lack of articles, I also focused on teaching during the interview process.

Students ask reference librarians various types of questions, from help with research for a paper to information on a specific topic. Using the reference interview is one way to help educate students on various issues. Making it necessary to examine the instructional benefits and find ways to improve them. It is also vital that library staff are trained correctly in chat reference and that LIS students have authentic reference interview practices. The articles chosen for this section are *Chat Reference Training After One Decade, Expanding the reference vocabulary: A methodology for applying Bloom's taxonomy to increase Instruction in the Reference interview, Resource Delivery and Teaching in Live Chat Reference: Comparing Two Libraries, Striving for Success in the Reference Interview: A Case Study,* and *Teaching the reference interview through practice-based assignments.*

The author's information from the article *Chat Reference Training after one Decade* will be discussed separately from the other articles since it focuses on training library staff and the competencies being taught. The author suggests that to improve chat reference training, they should be independent but cooperative while covering a broader range of topics (Devine, Davis, & Paladino 2011). It is also better to have hands-on training with the libraries’ software. At the same time, the basic introduction to chat etiquette included best practices for virtual reference, with chat policies included. The training should provide examples of good and bad virtual chat reference transcripts and have librarians with more experience work with those who are inexperienced with the software.

For the article, *A Methodology for applying Bloom's taxonomy to increase Instruction in the reference interview,* the author's information was hard to determine due to the jargon used. However, from what I could tell, the article, Bloom's taxonomy helps with information literacy and allows for specific education outcomes in the reference interview. Bloom's taxonomy levels also work with ACRL and RUSA behavioral guidelines (Ward 2011).

The authors had similar information in the articles Striving for *Success in the Reference Interview: A case study* and *Teaching the reference interview through practice-based assignments*. Role-playing assignments for LIS students are artificial and may not give a real-life example of a reference interview with a real patron. However, Saunders also stresses the importance of practical experience for developing interview skills (2016). While authors Saunders and Ung suggested other approaches to help improve students' skills, such as having students analyze reference interview transcripts to identify good practices and areas for improvement (2017). Saunders and Ung also thought it might be worthwhile to ensure that students get multiple opportunities to engage in the reference interview through a reference course(2017). This can be done with role-playing or an actual reference interview type of assignment.

The following article *Resource Delivery and Teaching Live Chat Reference: Comparing Two Libraries,* had beneficial information for improving teaching while still delivering specific resources to students quickl*y*. While it may be easier to give patrons the answer, this actually does more harm than good since it does not allow the student to become information literate. A librarian can still provide specific links, but this should be done with an educational role, not without. The author further states this, "Instruction is important, and so is demonstrating professional skills and getting relevant materials into student's hands" (Dempsey 2017). The author gives various suggestions to help librarians do both effectively in chat settings and how to avoid negative interview closure. Preventing negative interview closure is guiding the student to the relevant section and pointing out specific databases (Dempsey 2017). Other ways are sending a link to a sample search in a suggested database to show students that it includes relevant resources, mentioning a subject specialist in the library created the guide and is available for a follow-up (Dempsey 2017).

**Subtopic three: Virtual reference interviews**

It was fun to learn about the different types of virtual reference. I have had one experience using a chat reference service, where the librarians only provided links for my question. It was interesting to learn that there are different virtual reference platforms and how to do a virtual reference interview correctly. I also was surprised to learn that there is still racial and ethnic bias in virtual reference.

The virtual reference interview is similar to the traditional reference interview. The only significant difference is that the patron is not physically present. The same communication and interpersonal skills in a traditional interview are also used in a virtual interview. Just how each step is carried out is a bit different. So, the articles to be discussed in this section are *The Application of RUSA Standards to the Virtual Reference Interview, New Trends of Library Reference Services, Evaluating Virtual Reference from the Users Perspective, How can I help you? An examination of the reference interview as performed at the University of North Carolina Chapel Hill,* and *Colorblind: Investigating the racial bias of virtual reference services in English academic libraries.*

The authors state in the article, *The application of RUSA standards to the Virtual Reference Interview are* that “the Reference and User Services Association's elements of approachability, interest, searching, and follow-up still apply, but they need to be modified to take into account the fact that the patron is not physically present" (Trott & Schwartz 2014). These modifications will make a better user experience for the patron.

For the article, *New Trends of Library Reference Services,* the author's information was somewhat challenging; since the article mainly describes the new trends rather than giving their opinions of them. They discuss email, web form, chat, video-conferencing, VoIP, and collaborative digital reference services for the reference interview. The author states, "However, none of these changes or trends have been able to challenge the basis of library reference services" (Ranasinghe 2012).

The author's information in the *colorblind* article is that while virtual reference can provide positives, it can also allow for librarians' unconscious bias to impact the services provided based on the racial or ethnicity belonging to the patron. This bias may still occur based on something as simple as a person's name. According to the author, "African American sounding names were found in general to receive lower levels of courtesy, and a lower total response rate than White sounding names, indicating a bias based exclusively on the perceived ethnicity or race of the sender" (Hamer 2021). Thus, libraries should change their frameworks to implement a genuinely anti-racist policy.

In the article *Evaluation Virtual Reference from the Users'Perspective,* the authors believe that while there are many advantages to virtual reference compared to the more traditional, there are areas in services that need to be improved. There were features of the virtual reference services, which were not helpful, such as barriers in the environment, lack of acknowledgment and inclusion, and unmonitored referral. The authors point out that some librarians are skipping the reference interview. They also feel it is disappearing in virtual settings since librarians push the e-form to replace the reference interview. Instead, they argue " that the reference interview is an indispensable part of the reference transaction and needs to be part of every reference transaction, whether face-to-face or virtual" (Nilsen & Ross 2006).

The last article, *How can I help you?* the author's information was that successful virtual reference interactions were due to completed reference interviews. Also, "interviews, which contain complete implementation of each of the step's outline in the RUSA reference guidelines demonstrated a level of success far greater than interactions with incomplete interviews or no interviews at all" (Moore 2017). However, the author feels no interviews were better than those with partially implemented interviews, but the author based this on completed reference interviews as the best indicator of success.

**Conclusion:**

As a student in an MLIS program with limited knowledge of the Reference Interview and how to successfully conduct one, learning about this topic has been very helpful. I will be using the author's information on these topics, including the relevant material from the Access to Information course when practicing the reference interview. Especially using the checklist to make sure I have conducted a good reference interview. Using the information taught in these articles will improve, teach and help conduct a reference interview in any setting, which will improve the library's services, and patrons will receive better information overall.

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