

The Reference Interview in the Google Age

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Abstract:

This paper will examine the value of the “reference interview” in the technological age of Google. At a time when the “reference desk” has been pronounced “dead,” many public services librarians have watched in dismay the disappearance of the reference librarian’s place of prominence in the library world. Many special librarians – particularly in corporate and law environments-- have been replaced by web-based tools and reference as it was conceived in 1876 with Samuel Swett Green is no longer valued. While the death knell has been pronounced over reference, the reference interview (RI), the interaction that takes place between the librarian and the patron, is still the heart of library work. The whole notion of question-answering in the virtual and face-to-face environments is still as complex as ever. The “black box” is simply “more mysterious”. Bottom line: librarians across types of libraries must still find answers to questions for library patrons and teach them how to find answers. The paper examines the most recent RI practices over the past 10 years with the goal of providing a set of tools for the public services librarian to use to serve today’s technologically-savvy patron. Many of today’s users do not visit physical library facilities. The paper will further examine how reference librarians can use the interview to connect to wider audiences (traditional non-users) – especially underserved populations. If reference is to maintain its footing in the effective delivery of public services, the reference interview will need to play an important role in returning reference to its place of prominence in information work.

Keywords: reference interview, reference, reference evaluation, public services

Introduction

This paper will examine reference interview practices over the past 10 years with the goal of providing a set of tools for the public services librarian to use to serve today’s technologically-savvy patron. More specifically, the paper will determine how thinking about the “reference interview” (RI) has changed between 2006-2016. In the past 40 years, reference services have undergone changes across library types. The RI is the heart of reference activity. While reference collections are important and library staff members are equally important, the RI itself is the bridge between users and the information they seek.

The paper is divided into 3 parts. Part I will address 2016-2010. Part II will address 2011-2016. Part III offers a strategy for the “way forward.”

The First Five Years: 2006-2010

The context for reviewing the 5-year snapshot would be the discussion of Samuel Swett Green (1876) and Robert S. Taylor (1968). Green introduced the notion of personal relations between library users and librarians. Taylor addressed the dynamics of the exchange that takes place between the two parties. His question-negotiation template has framed the RI literature for nearly five decades. The patron goes through various stages of information-seeking during the interview process:

- Q1 – the actual, but unexpressed need for information (the visceral need);
 - Q2- the conscious, within-brain description of the need (the conscious need);
 - Q3 – the format statement of the need (the formalized need); and
 - Q4 – the questions as presented to information system (the compromised need).
- (p. 182)

After the librarian has understood the compromised need, he “passes” the question through “five filters:”

- determination of subject;
- objective and motivation;
- personal characteristics of inquirer;
- relationship of the inquiry description to file organization;
- the relationship of the inquiry to file organization;
- anticipated or acceptable answers. (p. 183)

The first five years were built on the RI literature of the past 20 years. Amid calls for the closing of reference desks, the demise of reference, the sheer decline of face-to-face interactions between librarians and patrons, the “reference interview” (RI) morphed into virtual reference (VRI) or digital reference.

The “overview” articles (Kraft, 2006; Doherty, 2006; Champ-Blackwell, 2006) build on the Taylor framework. Kraft speaks to the psychological profile of the user who approaches the reference librarian. Typically, he is traumatized or frustrated by having an unmet need, coupled with a limited knowledge of the information system. Kraft, in a tongue-in-cheek fashion, notes the best way to help a traumatized patron is to recognize and acknowledge the vulnerability of his position and to act accordingly. Doherty provides a solution by rephrasing the interaction; professionals should be engaged in a “reference dialogue,” he continues. The exercise should not be hierarchical/ top-down, but peer-to-peer. In other words, the “information-guru” model should be abandoned and a collaborative approach should be adopted. Sisselman (2009) and Brown (2008) support the balanced approach: the former examined user characteristics, emphasizing their importance in the RI; the latter provided practical examples. Champ-Blackwell notes that the RI sets the stage for developing a trusted relationship with the user.

Van Duinkerken, Stephens and MacDonald (2009) discuss chat reference implementation at Texas A&M University Libraries. One thousand thirty-five (1,435) chat reference transcripts were examined to determine their adherence to ALA RUSA guidelines (American Library Association, Reference and User Services Association). Researchers found that 82% of the reference sessions were successful in finding what users needed. Additionally, they found that reference behaviors – especially in the areas of listening/inquiring/ searching ---were frequently poor. The investigators attributed the behaviors to time constraints. They further conclude that the RUSA guidelines were not realistic or applicable to the (strictly) chat environment and that a separate behavioral standard should be developed for chat and IM interactions. The revised standard should ideally take into account the types of questions for which the RI is most suited and the behavior of its users, specifically the behaviors driven by their immediacy and speed-of-reply requirements. In the meantime, librarians should develop strategies for recognizing when a reference interview is or is not required.

Wilmoth (2008) and Kinney (2010) discuss question-analysis and question negotiation, respectively. Wilmoth compared the reference interview situation and crisis-intervention counseling. More specifically, she explored the similarities between reference service and the concepts of empowerment counseling. The emotional intelligence used in crisis intervention counseling is similar to the “listening with a third ear” required in reference work. That is, listening at what the patron is *actually* saying and what he *is not* saying. (Hence, the Taylor template.) Kinney (2010) further suggests that in chat situations, librarians feel that they must hurry through the question-formulation part of the interview to get to the answers quickly. The “hurry” can defeat the purpose, she notes. Patrons can frequently feel “unheard.” She suggests that in “live” virtual reference, “listening =reading.” (p. 17) In other words, while people want quick and friendly help, they also want their queries to be understood. Her conclusion: librarians should “communicate clearly; read the question carefully; be willing to move the question to another format; find out the timeframe.” (p. 17). Harmeyer (2010) believes that if the RI is done properly, the librarian should be willing to move from the desk to chat to the phone, as needed.

Price, Urquhart and Cooper (2007) describe the use of a “prompt sheet” to aid the “advisers” of a Health Telephone Helpline in England. The “cheat sheet” kept the advisers on track and helped them to collect the information they needed to fully answer the queries. The randomized control trial was conducted at eight National Health Service (NHS) Direct sites across England in 2003-2004. Newly recruited health information advisers (n=30), full and part time, were randomly allocated to a control group or intervention group (n=15), respectively. Twenty-six advisers completed the study. The prompt sheet included prompts for demographic information, reason for call, condition/treatment plan, existing knowledge of caller, special needs of the caller, handling the call empathetically, and conclusion. The researchers concluded that the use of the prompt sheet was beneficial for some (though not all) advisers to improve their RI technique. The structured RI provided the detailed query formulation that yielded satisfactory results for the helpline users.

Google research was reported by several authors (Cirasella, 2007; Bronshteyn and Tvaruzka, 2008; Cahill, 2007). All of the researchers suggested Google as a “file” to answer reference questions: Google Tools, Google Suggest, and Google Search History. Cahill recommended Google Trends, Google Earth, Google Print and Google News. All three recommended Google Scholar. Roth (2009) noted that Google and other Internet-related sites were useful for reference-checking on the web. Bibliographic verification of incomplete or inaccurate citations was handily cross-checked on the internet.

Partlo’s (2010) search file was not Google-related. Her resources were “data files.” She found that the RI in her situation included determining the files needed by the patrons and instruction on how to use the files. Paris (2008) also proposed adding information literacy to the RI – especially in the academic library environment. She felt that students should be instructed how to use the various online library tools.

Sullivan (2008) posed the question, “Is the virtual reference interview dead?” She reports the anecdotal findings of an informal survey of three librarians from Melbourne, Australia. The librarians were from the public, health and academic sectors. Two responded “yes” - the VRI was dead; the third responded “no.” The public librarian reported that email reference (Ask a Librarian) was rarely used; the health sciences librarian (hospital) reported little need for the VRI. The hospital library/mental health services affiliate used web forms which were designed to elicit as much information from the patron as possible. The detailed form, in one sense, took the place of the reference interview. Telephone numbers were requested on the forms so the librarians could follow up with users for query clarification, if necessary. The academic librarian responded “no” to the RI-viability question. She reported on the frequently used chat reference service. The questions in her library ranged from basic to complex. All three librarians reported the use of the traditional RI when patrons approached the reference desk in-person. However, the VRI was not dead, but Sullivan was concerned that it was “on the ropes,” “endangered.”(p. 14). Librarians need to take critical measures to improve it, to nurse it back to health.

The following table lists RI reports from the first five years.

Reference Interview Reports , 2006-2010, by Year

Years	Authors	Topics*
2006	Kraft	RI –overview
2006	Champ-Blackwell	RI- overview
2006	Doherty	RI-overview
2007	Price	RI –prompt sheet/telephone reference
2007	Cirasella	RI – Google tools
2007	Cirasella	RI – Google tools
2007	Cahill	RI -Google tools
2008	Sullivan	VRI-evaluation
2008	Bronshteyn & Tvaruzka	RI -Google tools
2008	Brown	RI-overview
2008	Wilmoth	RI – question-negotiation
2009	Breitback & Demars	RI- Google tools

2009	Roth	RI-reference checking
2009	Paris	RI –Information literacy
2010	Partlo	RI-data files
2009	Van Duinkerken, Stephens & MacDonald	RI –chat reference
2009	Sisselman	RI- user characteristics
2010	Harmeyer	RI-information literacy
2010	Harmeyer	RI – desk/chat/telephone
2010	Kinney	VRI-question analysis

*“RI” stands for reference interview.

“VRI” stands for virtual reference interview.

Most of the “Group 1” conversation has built on the Green and Taylor philosophies. Several overview articles point to the continued need for the RI and VRI. The remaining articles emphasize the different aspects of the interview -- the communication skills needed, pre-search preparation (webforms); and various files (or tools) to search during the interview process.

The Second Five Years: 2011-2016

Several RI overviews were identified in “Group 2.” RI thinking appears to be shifting from “what works” and “what does not” to the development of training tips and strategies for improving RIs in the digital age.

Two RI books were published during the second five years. Knoer ‘s The Reference Interview Today (2011) and Harmeyer’s The Reference Interview Today: Negotiating and Answering Questions Face to Face, On the Phone and Virtually (2014). Knoer emphasized the importance of finding ways to connect with patrons. She notes that “Since there are no longer verbal clues in the chat interview or other online service, the “open –question” is vital (p. 48). She continues, “The online environment does not give as many clues as to what the patron needs, so you have to ask often and clarify even more often. You are a more sophisticated and experienced searcher, but you need to be a better questioner.” (p. 48). Harmeyer provides 12 vignettes of RI examples that could be useful for training purposes.

Cantwell (2011) examined characteristics of public library reference department users who requested assistance with legal questions. Described as “self-represented litigants,” she needed help getting her legally naïve, unsophisticated patrons to articulate their “real” information needs. She initiated a collaborative effort among law librarians (AALL, Association of Law Libraries) to develop an assessment tool as a training measure. The READ Scale (Readiness Effectiveness Assessment Data) rated inquiries by how much knowledge was required to answer the questions and the amount of customer serviced provided. Luo (2015) and Quint (2016) report on the sensitive handling of medical questions in the public libraries and the VRI skills needed to handle complex, interdisciplinary inquiries in the academic environment. Ward (2014) promotes Bloom’s taxonomy as a tool to be used in RI training.

Deineh, Middlemas and Morrison (2011) address a different user group. They discuss the myth of tech-savvy millennials who do not need help from reference librarians. The researchers note that even though the users know how to search Google, social networks sites

(Facebook, Twitter, etc.) and Web 2.0 technologies, they are not necessarily able to search library databases. One problem with the typical reference transaction (face-to-face or digital) is that it often presumes students are “digital natives” (p. 21) who are competent and comfortable searching for relevant library material and web-based sources.

Schwartz (2014) explains how virtual reference service can be modified to accommodate online contact. He suggests a fresh look at the RUSA elements of approachability. Eubank (2014) further emphasized the importance of interpersonal communication. Anderson (2013) promotes the importance of using more open-ended questions (than closed questions) in virtual reference. Harmeyer (2013) further credits the interpersonal skills of the librarian as the reason RIs still thrive in today’s libraries.

Coonin and Levine (2013) proposed checklists for librarians to use to improve the reference encounter. Additionally, they recommend four tips to librarians to improve the interaction: (1) be approachable; (2) listen/inquire; (3) clarify/verify; and (4) follow-up.

Nicol and Crook (2012) evaluated virtual reference services at Washington State University-Pullman. Asynchronous services were investigated – email, Library Answers, IM (instant messaging), and SMS (short messaging service or text messaging). They found that of the tools used by reference librarians in the study, IM was the most popular. Email reference was also a preferred option. Yang and Dalal (2014) investigated 3362 academic libraries to determine their current VR practices. Nearly three-fourths (74%) of the libraries used at least one of the following VR techniques – email, phone, chat, IM, text or video chat. Approximately one-half (47%) of the libraries provided chat.

Ramos and Abrigo (2012) also evaluated Reference 2.0 tools IM was the most preferred medium; the least favorite was online tutorials. Web-forms were also used, but not as much as IMs. Other online tools, especially Google, used by librarians included Google Scholar, Google Books, bookmarks, etc. (Jia, 2011).

Beyond Google, Spencer et al. (2011) identified several search engines that may be used in the VRI: Silobreaker, Zuula, Bing, ChaCha, CompletePlanet, Spezify, Wolfram/Alpha and Wowd. Young (2014) promotes the addition of Twitter to the librarian’s toolbox, noting that most social media questions cannot be publicly displayed (for confidential reasons), but reference staff can expand their networks. Zhang (2014) compared the chat reference to “Yahoo’s “Question and Answers” as she highlights their similarities and differences. She adds that patrons frequently turn to social media initially as they attempt to answer their basic-level questions.

Meredith (2013), on the other hand, reports the use of a web-scale discovery tool, Summon, to formulate and articulate more complex questions. According to Vaughn (2011), web-scale discovery services offer a deeper level of searching to librarians and users; additionally, they pull together the library’s physical holdings, digital collections and institutional repositories.(p. 5).

The “Group 2” researchers appear to emphasize VRI training as a way of learning to better serve online patrons. They encourage librarians to continue to incorporate emerging technologies into their tool boxes, while holding onto the basic philosophies of good reference service.

The following table lists the RI reports for the second five years.

Reference Interview Reports, 2011-2016, by Year

Years	Authors	Topics*
2011	Cantwell	RI-training
2011	Deineh, Middlemas & Morrison	RI-user characteristics
2011	Koens	RI-overview
2011	Jia	RI- Google tools
2011	Spencer et al.	RI -Google tools
2011	Ward	RI-training
2012	Nicol and Crook	VRI-evaluation
2012	Ramos & Abrigo	VRI-evaluation
2013	Anderson	RI-training
2013	Coonin & Levine	RI-training
2013	Harmeyer	RI-overview
2013	Meredith	RI-Google tools
2014	Eubank	RI-communication skills
2014	Harmeyer	RI-overview
2014	Schwartz	RI-evaluation
2014	Young	RI-Web tools (Twitter)
2014	Zhang	RI-Web tools (social media)
2015	Luo	RI- training
2015	Yang & Heather	VRS –best practices
2016	Quint	RI-question-negotiation

*"RI" stands for reference interview.

"VRI" stands for virtual reference interview.

"VRS" stands for virtual reference services.

Most of the RI conversation during the second five years addressed training, evaluation and best practices. Fewer of the discussions were overviews and tools-oriented.

The Way Forward

How, then, has RI thinking changed over the ten-year period examined? Reference librarians are exploring various ways to deliver satisfactory service. Since their reference desk traffic has diminished, they are experimenting with asynchronous and synchronous virtual reference delivery. (Asynchronous virtual reference includes email, IM, etc; synchronous modes include chat, video chat, etc.) Empirical researchers are investigating which types are most effective with their patrons. At this point, IMs and chat reference are popular trends.

Based on the current RI thinking, what are implications for library practice? Reference staff are still the "faces" of the library. In other words, they are typically the first (sometimes

only) staff members patrons “see” – in-person or virtually. They are “bridges” between users and library collections.

Reference librarians should:

1. Hold to the basic tenets of good reference work – no matter the format.
2. Continue to evaluate the best RI practices for various library types.
3. Invest in writing/compiling training manuals to instruct reference staff on how to conduct RIs and VRIs.
4. Increase reference department budgets to expand reference services to include asynchronous and synchronous (virtual) reference. Budgets should include equipment, staff, training, etc.
5. Commit to “staying the course” as better ways to deliver reference services to library patrons are explored.

Conclusion

In conclusion, the RI narrative that has emerged over the past ten years shows that the process is alive and well. Librarians across various types of libraries have embraced newer technologies to improve the delivery of reference work. Drew (2008) agrees with Tyckoson (1999) that no matter the format -- whether traditional or digital -- “good reference” remains the same. The only thing that library users want – at the end of the day – is excellent service.

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