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Preface

Nine years have elapsed since the publication of the second edition of *Conducting the Reference Interview* in 2009. Colleagues teaching in MLIS programs and librarians doing training with reference staff have told us that they use the book in their courses and for ongoing staff training—but they want an update. Hence this third edition, in which some sections are entirely new and every section has been updated to acknowledge changes in the reference and research landscape. This edition is the fruit of a happy complementarity of two research programs that investigate the reference encounter through the lens of communication theory and practices: the Library Visit Study, conducted by Pat Dewdney, Catherine Ross, and Kirsti Nilsen at The University of Western Ontario and the series of studies funded by IMLS and conducted by Marie L. Radford at Rutgers University together with colleagues, particularly Lynn Silipigni Connaway from OCLC, and Chirag Shah of Rutgers. We have consolidated research findings—our own and that of others—from many different books, articles, studies, and other sources in order to provide readers with a compact, research-based guide to the reference interview.

The seed for the first edition of this book was a workshop that Patricia Dewdney and Catherine Ross developed to teach the skills required for effective reference interviews. Over the years, Dewdney and Ross presented this workshop to thousands of information professionals in Canada and the United States. We called the workshop “How to Find Out What People Really Want to Know,” although privately we thought of it as “Why Didn’t You Say So in the First Place?” Anyone who has worked in reference will instantly recognize the problem—“everything you have on travel” turns out to be a request for information about how to get a visa for travel to China. A person asking for “information on allergies” actually wants to know whether naturally fermented sourdough bread is a good bet for a person with gluten sensitivities. Workshop participants shared with us hundreds of examples of this sort, which became classroom examples and sources of
teaching exercises. *Conducting the Reference Interview* was written initially in response to the many librarians, educators, and students who have asked us, “Can we use your handouts for our own staff training?” or “Where can we read about skills for the reference interview?” or “I have to develop a training package for my staff/my course, and I need any help I can get.”

Although knowing sources and how to navigate information systems is crucially important, this book is not about reference sources or about where to look for information. It is about the librarian’s acquiring enough understanding of the user’s information need to be able to know, quite specifically, *what* to look for. The most comprehensive knowledge of sources is wasted if the information intermediary is looking for the wrong thing. Whether the reference encounter is in-person, over the phone, or virtual, the process of finding out what the user really wants is the bedrock of successful reference service upon which everything else depends. At its heart, this book is about communication. And because the basics of human communication have not changed in the past decade, we have retained the microskills training approach, developed by Allen E. Ivey and adapted for the library context in the third edition of *Communicating Professionally* by Ross and Nilsen (2013).

As we stress throughout this book, effective communication is not an innate gift possessed by the lucky few, but consists of a set of skills that can be learned and practiced and taught to others. But learning skills on their own is not enough. Therefore, our discussion of skills is contextualized within a framework that lays out some basic assumptions, specifically about the underlying mission of libraries and the need for a user-oriented library service. In this book, we try to connect theory and practice, research findings and specific applications as they occur in different library settings. Our goal here is to translate research findings about the reference transaction into practical guidelines and exercises that can be used by professionals who work in information settings. The constant theme uniting everything is the crucial importance of taking a user-centered rather than a system-centered approach to thinking about reference service.

**Features**

We have designed this book with a number of features that we hope readers will find helpful.

**Integration of theory and practice.** We are convinced that a useful book on conducting the reference interview must be informed by relevant theory and research while also being purposefully practical. This is the only published book on reference interviewing that provides a detailed, step-by-step introduction to communication skills and how to use them effectively in the reference encounter. But the goal is not to provide a magical list of behaviors and scripts to be followed mindlessly. We offer instead a framework of theory and practice
designed to help information providers develop a repertoire of skills that they can use flexibly and intentionally in helping users. It is important to understand why a particular skill works and in which situations. Therefore, we stress the theoretical underpinnings to be found variously in work by Brenda Dervin on sense-making, Allen E. Ivey on microtraining, Erving Goffman on face-work, and others. Sense-making is an approach developed by Brenda Dervin that focuses our attention on how people use information to make sense of their lives. Instead of assuming that information is a commodity that is valuable in itself, sense-making directs us to ask, “How will this information help this particular individual deal with a particular situation in the context of his or her own life?” Microtraining was developed by Allen E. Ivey as an effective way to teach interview skills to counselors, and it is based on the idea that complex communication behaviors can be broken down into constituent parts that can be taught, one at a time. We have modified these innovative models in order to focus on the strategies and skills that are most useful for the reference interview.

Research-based conclusions. Because all of this book’s authors have taught reference courses in graduate professional programs and have conducted research on the reference interview, we have a rich storehouse of empirical data on which to base our recommendations and conclusions. For example, for the Library Visit Study conducted at The University of Western Ontario, we asked MLIS students to go to a library of their choice, ask a question that matters to them personally, and write a step-by-step account of what happened. They also evaluated the experience, describing what they found helpful and not helpful about the service provided. Successive classes of students have provided accounts of about 260 in-person reference transactions, 150 virtual reference transactions, and 640 in-person readers’ advisory transactions. This corpus has been especially valuable for the insight it has offered into users’ perceptions of their experiences asking a reference question. For the IMLS funded large-scale, multiyear grant projects Seeking Synchronicity and Cyber Synergy, the Radford, Connaway, and Shah research teams have analyzed a vast amount of longitudinal qualitative and quantitative data, especially dealing with virtual reference services (VRS) from librarian, user, and potential user points of view.

Real examples. None of the quoted examples involving conversations between users and librarians have been made up. All are verbatim excerpts from actual reference transactions, derived for the most part from our own research programs
and occasionally from the published research of others. This means that the points we make about communication in the reference interview are illustrated throughout with real examples taken from the field. We have drawn on the transcripts of 332 reference interviews that Patricia Dewdney audio-recorded in public libraries. We also have used data from the Mental Models study, in which Patricia Dewdney and Gillian Michell observed reference transactions in three different public library settings and afterward interviewed the librarians and thirty-three users about their perceptions of the transactions. We have drawn extensively on data from Radford and Connaway’s research on virtual reference service (VRS) from 2004 to the present day. Their research agenda produced a large number of phone and online surveys of VRS librarians, VRS users, and VRS nonusers, as well as an international sample of a great many verbatim transcripts of chat reference. This corpus of transcripts and survey results has allowed analysis of types of questions asked, communication behavior of users and librarians, accuracy of answers to ready-reference questions, barriers and facilitators of chat reference, and more. We use real, rather than made up, examples in order to ground our discussion of the reference interview in the everyday context of the library environment and of actual interpersonal engagement. With these rich research-based data sources, we have been able to illustrate particular aspects of the reference interview—the physical environment of the library, communication accidents, ill-formed queries, appropriate use of specific skills such as open questions, special adaptations required in the text-based environment of virtual reference service, what happens when appropriate skills are not used, and so on—with specific examples drawn from real reference transactions and real statements from users. Although the challenge of finding out what the user really wants to know is the same in public, academic, governmental, corporate, and other special libraries, we have tended to illustrate our discussion with straightforward examples drawn from public libraries, so that a specialized subject background is not needed to understand the context of the user’s question.

Real reference cases presented for analysis and reflection. In a feature called ‘Analyze This Reference Encounter,’ we provide eighteen cases drawn directly from real transactions in face-to-face and virtual reference. Each case includes a verbatim exchange between the user and librarian, plus some commentary to provide context and perhaps some questions for discussion. These cases, which illustrate and elaborate on
themes developed in their respective chapters, are intended to provide opportunities for further reflection and can be used both by individual readers and as the basis for a group exercise and discussion.

**Voices from practicing librarians.** In a feature new in this edition called “Lessons Learned,” we asked practicing reference librarians who are leaders in the field to tell us about a reference transaction that stands out for them as the most memorable and instructive. We said, “We would like to hear about a case that illustrates either the good or the bad of what can happen. Your best example of a ‘lessons learned’ case might be a challenging transaction during which you learned something unexpected about what makes for success. Or you might want to tell us about a case that caused you to reflect on what went wrong and say afterwards to yourself, ‘Yikes! Who knew! Here’s what I’ll do to prevent this from happening next time.’” We asked them to describe the following: the situation (type of library, the initial question asked, and any relevant special circumstances); what happened that made this reference interview so challenging; and the lessons learned that could provide guidance for others. We were hoping for—and got—wonderful examples drawn from a wide range of reference encounters: different settings (academic libraries, public libraries, a law library, a prison library, chat reference services); different categories of users (seniors, young adults, agents with imposed queries asking a secondhand question, persons with disabilities, incarcerated persons); and using different modes (face-to-face and virtual). The stories of lessons learned provided by these experienced librarians vividly illustrate key principles relating to conducting the reference interview, but they also demonstrate the life-changing difference a helpful librarian can make in the lives of users. Contributors’ descriptions of the situation and what happened were lightly edited for consistency, but the “Lessons Learned” have been presented exactly as we received them.

**Tested exercises for use in classrooms and library training programs.** The genesis for this book was the teaching environment of the classroom and the reference interview workshop. In both settings, we found that a combination of methods worked best, including assigned readings, mini-lectures, modeling, group exercises, role-plays, and discussions. Throughout this book and accessible through the index, we have included some of the exercises we have found most successful from our own training programs and those of others. We recommend that instructors in reference courses teaching the reference interview focus on one basic skill at a time over the period
of the course. One of the external reviewers of this edition suggested “using this text for a course or ongoing training using the exercises as ‘Five-Minute Teaches’ to build in some time talking, thinking, and practicing the reference interview across many weeks. This would embed the reference interview across the semester so that learning about this complex topic is sequenced and reinforced through repetition.” To this end, chapter 8 provides suggestions on how these exercises can be used in the classroom and in developing in-house training programs in libraries.

**Organization**

This book has been designed to be read in two different ways. If you start at the beginning and read consecutively, there is an unfolding order and linear development: from skills to applications; from individual practice to the institutional context in policy and training; and from foundational and historical underpinnings to future trends. We know, however, that you may come to this book with a particular area of interest in mind. You may want to zero in on particular skills such as attending skills or questioning skills. Or you may want to focus on specific applications, such as interviewing children, or conducting the readers’ advisory interview, or new developments in chat environments.

Therefore, we have designed this book to be modular. You can dive into the book at any point and read backward or forward, following your specific interests. Each section is more or less self-contained, with selected suggestions for further reading at the end of the chapter. An extensive index and a system of cross-referencing allows you to start with whatever interests you and follow links to other places in the book where a particular skill or concept is further explained. The sidebars and text boxes are in dialogue with the main text, offering tips, exercises, and interesting nuggets excavated from the research literature. It is our hope that you can open this book anywhere and find something on the spread to engage you and draw you in.

In chapter 1, “Why Bother with a Reference Interview?” we describe the theoretical foundations for this book and review perspectives on the need for conducting a reference interview. We argue that taking users’ initial questions at “face value” does not work. Chapter 1 introduces a theory of mental models to explain why users do not always present their initial questions clearly and completely. To provide historical context in this chapter, we also review landmark research studies that have evaluated reference service and identified areas where that service falls short. We conclude that if librarians want to provide helpful answers beyond “the 55 percent rule,” they must hone their communication skills to perform “the art of translation.”

In the next three chapters, we use Allen E. Ivey’s microtraining approach to identify those communication skills that are most helpful in the reference
We illustrate these with examples, both positive and negative, from our own research and training programs. Chapter 2, “The First Thirty Seconds,” covers the basic skills needed for the crucial first seconds of contact—nonverbal, listening, and verbal skills that establish a positive communication climate. Chapter 3, “Finding Out What They Really Want to Know,” begins with some common problems observed in reference interviews, such as negative closure and unmonitored referrals, and then sets out the major skills for the reference interview—asking open and sense-making questions, avoiding premature diagnosis, paraphrasing, summarizing, and achieving closure. Chapter 4, “Beyond Negative Closure,” includes skills that are useful for later stages of the interview— inclusion, one-to-one instruction on library use, and essential follow-up techniques. We also give tried-and-true tips for practicing and integrating these skills into everyday behavior.

Chapters 5, 6, and 7 cover a variety of the special contexts in which librarians must adapt generic skills for particular purposes and user groups. Chapter 5, “Special Contexts for the Reference Interview,” considers phone reference service, the secondhand reference interview, and the needs of special categories of users. We discuss special considerations required for the reference interview with the following types of users: children and young adults, seniors, adults from diverse communities, people with disabilities, and users who are “problematic.” This chapter also considers the communication challenges arising from users’ medical and legal reference questions. Chapter 6, “The Reference Encounter in Virtual Environments,” has been almost entirely rewritten since the second edition to take into account the past decade’s burgeoning interest in, and research on, VRS. Here we deal with the principles of communicating effectively in the VR interview and emphasize both continuities—the things that are the same as in the face-to-face (f2f) reference interview—and the important differences. Chapter 7, “The Readers’ Advisory Interview,” has likewise been expanded, with added facets covered, in order to acknowledge the growing profile of readers’ advisory work within public and academic libraries. Finally, in chapter 8, “Establishing Policy and Training for the Reference Interview,” we consider the broader institutional context—library policies and training programs that are designed to help librarians improve information service through more effective reference interviews.

At the end of each chapter, we provide reference lists of the sources cited in the chapter, as well as annotations for references that can be used for further reading and study. This way, helpful sources appear at the point of use for the reader, rather than in one long bibliography at the end of the book.

Applications

We have written this book to provide a single accessible source that draws together the scattered findings of research and practice and translates them into practical guidelines and exercises that can be used for training and for
individual learning. Over the past three decades, research programs have filled in a lot of gaps in our understanding of the reference interview—what works and what doesn’t, what can go wrong despite the best intentions of the librarian, and what explains puzzling user behavior (why do users ask for “everything on refrigeration” when they want to know how to repair a refrigerator?). Our goal here is to integrate the most valuable work done by ourselves and others on the reference transaction in one complete and comprehensive volume.

The pages that follow combine our most useful training materials for the reference interview with a map to the most useful research—all set within a framework for thinking about information service. This book is based on the idea that people learn best when they are actively engaged. Each chapter therefore combines explanatory text with modeling, many examples drawn from actual reference interviews, exercises that provide opportunities for practice, and annotated references that provide recommendations for further reading. We have designed this extensively updated edition to be useful both to individual learners and to trainers and supervisors who want support materials for staff training on the reference interview.
Acknowledgments

It’s a commonplace to say that it takes a village, and this claim is especially true in the formation of this book. It could not have been written without the help and cooperation of the hundreds of individuals who participated in various capacities in research studies that were conducted over the years by the coauthors of all three editions of Conducting the Reference Interview. That research has shaped our thinking on the reference interview and forms the bedrock for much of what we say here. First, there are those pioneering librarians who participated in Patricia Dewdney’s original field study of audio-recorded reference transactions as well as in her Mental Models study, which was co-conducted with Gillian Michell at The University of Western Ontario. Then there are the more than 400 graduate students from that university and the University of Toronto who were coinvestigators in the Library Visit Study, phases 1 to 3, over a period of fifteen years. In person and through e-mail and chat, these participant observers asked questions in libraries that mattered to them personally, and they provided detailed accounts and incisive evaluations of their experiences. A similar debt is owed to the more than 500 graduate students from The University of Western Ontario who participated in the RA Library Visit Study and wrote accounts of their experiences, good or bad; and to Jennifer Noon, who analyzed the RA Visit data reported in chapter 7. And finally, we are indebted to individuals who participated in and supported research on VRS. For the valuable research contributions and live-chat VRS examples from QuestionPoint, we thank OCLC Inc., especially Senior Research Scientist Lynn Silipigni Connaway and Erin Hood. Dr. Connaway is coprincipal investigator with Marie L. Radford on the Seeking Synchronicity and Cyber Synergy grant projects, and she continues to be a collaborator and coauthor on the Face-Threats and Microaggressions project, which is highlighted in chapter 6.

In addition, we owe heartfelt gratitude to the many colleagues who have graciously shared their expertise by contributing to sections of the
text. Lynne (E.F.) McKechnie wrote in its entirety section 5.4 on the reference interview with children and young adults. Eight experienced reference librarians contributed to the new feature in this book that we call “Lessons Learned.” We asked researchers and librarians from various types of institutions to share some of their most memorable reference interviews, good or bad, in which they learned something that made a significant difference to their thinking about reference interviews. We thank these contributors for their generosity in eloquently sharing these deeply personal learning experiences: Nicole A. Cooke, Tonya Garcia, Nancy Huling, Cathay Keough, Jameson Rohrer, and Susan Wengler, plus two anonymous contributors.

We also thank the many individuals, including PhD students and recent alumni of Rutgers University, whose work contributed to chapter 6 on virtual reference service. We especially want to recognize the contribution of Dr. Vanessa Kitzie (assistant professor at the University of South Carolina) for her work on section 6.2.3, “Avoiding Face-Threats and Microaggressions in VRS,” in summarizing and extending the research of Radford, Kitzie, Connaway, and Floegel (2017). Vanessa Kitzie and Diana Floegel (a PhD student at Rutgers University) helped to create the table “Instead of This . . . Try This: Avoiding Face-Threats and Microaggressions” and to identify examples. The material on face-threats in these sections draws upon Radford, Radford, Connaway, and DeAngelis (2011). Diana Floegel provided excellent assistance, especially in helping to compile and edit section 6.5.2, “Articles, Books, and Websites, including Cited References,” and in writing annotations. She also composed the “Did You Know?” sidebar item in section 6.1 on the Internet Public Library. Additionally, we recognize the contribution of Hannah Kwon, PhD (Rutgers University, and part-time lecturer in the Department of Library and Information Science at Rutgers), for summarizing the literature on texting reference and for drafting section 6.2.4, “Virtual Reference Service via Texting.”

We also want to acknowledge the many individuals who provided inspiration, suggestions, tips, and support, including Pam Bidwell, Mary K. Chelton, Susan DeMaine, Joan Durrance, Pamela McKenzie, Gillian Michell, Sarah Morrison, Duncan Smith, Wren Spangler, David Ward, and the “super-readers” interviewed by Catherine Ross: Cindy Orr, Nancy Pearl, Joyce Saricks, Sharron Smith, and Neal Wyatt. Grateful thanks are also due to the attendees in our workshops, the students in our graduate courses, and the readers of earlier editions who have tried out the exercises and given us feedback, suggestions, and fresh examples. And finally, we thank our editor Rachel Chance, the advisory board, and the great designers and production folks at the American Library Association for their feedback, support, and encouragement.
1.1 What Is a Reference Interview?

An interview is a special kind of conversation directed intentionally to some purpose. There are, of course, many different types of interviews, from face-to-face interviews between two individuals, to in-person group interviews, to online interviews mediated through various emerging technologies. In the discussion in this section, we often refer, for the sake of clarity, to the in-person interview between two individuals. But it should be understood that the reference interview has many different modulations and variations, which we specifically address in chapters 5, 6, and 7.

Whatever the medium used, an interview can vary widely along many dimensions, including the power relations established between the participants, the degree of trust involved, the duration of the interview, the length of responses, the degree of structure in the questions, and the purpose of the interview. Consider the difference between two very different kinds of interviews. At one end of the spectrum there is the police interrogation in which the interviewer is totally in charge and sets the agenda for the questioning. Trust is low in such interviews, whereas questions are structured and often closed (“Did you leave your house on the evening of the twentieth?”), and answers are often uninformative or not forthcoming (“No”). The purposes of the police interrogator and the suspect are usually diametrically opposed. At the other end of the spectrum there is the oral history interview or research interview, in which both parties are equal partners. Trust is relatively high, with open-ended questions geared to eliciting the interests and priorities of the interviewee. Because answers are often very lengthy, these interviews may last an hour or more, and the purpose of the interview is mutually shared.

Irrespective of the duration of the interview, a key factor is the extent to which the interviewer and interviewee share a common purpose. Sometimes an interviewer makes an erroneous assumption about the interviewee’s purpose, as in the case of a young user who asks for “information about a classic novel,” hoping to find a brief plot summary for a book report due that
day. The student wants to do the minimum amount of work possible to get through the assignment and is not really interested in reading the “classic novel” itself. The librarian, on the other hand, thinks that everyone should take advantage of educational opportunities to read great works such as Moby Dick. Such interactions are likely to go badly.

Despite obvious differences among different types of interviewing, all interviews share some common features. A growing body of literature has been developed to explain what some of these important features are. Although interviews seem to resemble ordinary conversations, they actually differ from everyday talk in important ways. It is the job of the interviewer, not the interviewee, to keep in mind these differences between a well-conducted interview and a friendly conversation.

- Participants in conversations are expected to follow the rule of turn-taking where each person has a relatively equal share of talking and listening. In interviews, on the other hand, it is acceptable, and in fact highly desirable, for the interviewer to do a lot more listening while encouraging the interviewee to talk. See “Listening” (section 2.4.5).
- Unlike typical conversations, interviews involve the asking and answering of questions, where one person normally asks the questions and the other answers. See “Open and Closed Questions” (3.2.1) and “Sense-Making Questions” (3.2.3).
- Unlike typical conversations, interviews are directed toward a purpose. Any topic not relevant to the purpose of the interview can appropriately be excluded by a comment that brings the discussion back to the purpose of the interview (e.g., “that's interesting about your holiday trip, but to get back to your question on submarines, what aspect of submarines interests you?”). See “Closure” (3.2.5).
- Redundancy and repetition are drawbacks in conversation, but they are desirable in interviews, in which the interviewer often asks the same question in different words in order to get a fuller picture. Interviewees often don't spill the beans right away because they are following the rules for conversationalists (don't be boringly repetitive or talk at length about yourself) rather than the rules for interviewees (provide as full an account as is useful about the topic of the interview). Effective interviewers use encouragers and probes to reassure the interviewee that they are not bored and to get the interviewee to expand on a statement (e.g., “What else can you tell me about your research project on bagpipes?”; “Uh-huh, anything else?”; “That's interesting. Anything else?”; “Could you give me an example of that?”). See “Minimal Encouragers” (2.4.4).
- Unlike a participant in a typical conversation, a good interviewer uses a number of strategies to make sure that the interviewee
Why Bother with a Reference Interview?

has been fully understood and that the message has been accurately received. These strategies include paraphrasing and summarizing what has been heard (e.g., “Okay, so it sounds as if X is the case”; “You feel Y”; “You want Z to happen. Did I get that right?”). See “Reflecting Content” (3.2.4).

• Unlike ordinary conversation, an interview has a structure that must reflect its purpose. The stages of an interview usually are

1. greeting the interviewee and establishing rapport;
2. general information-gathering or getting the big picture;
3. specific information-gathering;
4. intervention, such as giving information, advice, or instructions; and
5. ending, including feedback or summary.

These stages may be iterative, occurring in loops throughout the interview, such as when the interviewer needs to reestablish rapport or do some more general information-gathering before the interview ends.

But what about the reference interview? The term reference interview suggests to most librarians a short face-to-face, telephone, or online interview conducted for the purpose of finding out what the user really wants to know so that the staff member can match the user’s question to the library’s store of information. Librarians generally agree that users’ initial questions are often unclear or incomplete. The purpose of the interview is to elicit from the user sufficient information about the real need so that the librarian understands it enough to begin searching. The user’s initial question often needs to be clarified, narrowed down, made more detailed, and contextualized. Questions asked during the reference interview are intended to elicit specific kinds of information: What does the user want to know? How does the user plan to use the information? What level of detail, technical specialization, or reading complexity is wanted? What is the preferred format for the information? Other restrictions may emerge such as how much work the user is willing to do to get the answer, whether there are time limits or deadlines, and how current the information must be.

The typical reference interview is considerably shorter than most types of interviews such as counseling interviews, ethnographic interviews, oral history interviews, and journalistic interviews. However, although reference interviews typically last on average only three to five minutes, a reference interview with a client with complex research needs may go on much longer. Variations on the basic form often occur. In the readers’ advisory interview (see 7.5), librarians have directed conversations with readers about their reading tastes, experiences with books that they have read and enjoyed (or disliked) in the past, their current reading situation, and what they are in the mood to read at present. Sometimes librarians, when they are unable to communicate directly with a user who wants the information, must work through a delegate who is asking the question on behalf of the end user. Melissa Gross has called this situation “the imposed query” (5.3.1).
special case of the imposed query occurs when students need to get material to complete a school assignment about which they may have no personal interest (5.4.3). Reference interviews are conducted through various channels, including telephone (5.2), online (chapter 6), and in person. Not infrequently, a question that begins in one communication channel moves to another channel before the interaction is completed (see 6.4).

All reference interviews in their various guises can be defined simply as purposeful conversations between librarians and users in which librarians ask questions in order to get a clearer, more complete picture of what users want to know—all with the goal of linking the user to appropriate resources. In addition, the reference interview may include related functions such as giving information, advice, or instruction; getting feedback; and following up to assess users’ satisfaction with the help provided. Although all reference interviews are unique, they have common structural features and go through similar stages: establishing contact with the user, finding out the user’s need, and confirming that the answer provided is actually what was needed. There are a standard set of skills that staff members can learn, practice, and use to increase the likelihood that the interview will be productive. The interview can go wrong in predictable ways, and there are standard ways of recovering from “communication accidents.” Whatever the purpose of the interview, interviewers should have a clear idea before the interview starts of why they are conducting it and what they hope to accomplish by the end.

1.2 The Service Orientation of Libraries

Is a reference interview really needed? Reference service as a core function in libraries has been around for scarcely more than a century. For the first half of that period, all attention was directed to learning about sources, not communicating with users. Some authorities say that a reference interview is needed only under certain circumstances, and definitely not for directional queries or for ready-reference questions. Two arguments, which we call myths, have been advanced against worrying too much about reference interviewing skills. Both arguments, in our view, are wrong. When they prevail, people don't get the service they need, which is a problem because institutions that will survive in the twenty-first century are those that continue to adapt to serve their clients’ needs. This book is founded upon the principle that libraries must take a service orientation. If they don't, people will turn to competing services that do. The Reference and User Services Association’s “Guidelines for Information Services” (RUSA 2000) states: “ Provision of information in the manner most useful to its clients is the ultimate test of all a library does.”
Myth 1: Because users are usually pretty clear about what information they need, the reference interview is not often necessary.

According to this view, library users know what they need and they ask for it clearly. The user’s question is straightforward; the tricky part for the intermediary is knowing the range of tools that contain the answers. However, research in many fields has drawn attention to the complex nature of human interactions. Observational research that has studied reference transactions in field settings has demonstrated the fallacy of taking the user’s initial question at face value. Some 40 percent of users do not ask clear and complete initial questions, especially those who are unfamiliar with how libraries work. The reference interview is crucial when interviewing such users, but it also enhances the likelihood for all users of receiving a helpful answer.

Myth 2: The onus is on users to know what they want and express their needs clearly.

Patrick Wilson’s “face value” rule puts the onus on the user: “Assume that information requested is information wanted; interview only to clarify the initial formulation of the request” (1986, 469). If users ask for the wrong thing, too bad; that’s their look-out. The face value rule puts the onus on users to become more informed about library systems so that they can ask better questions. The rule makes the reference interview unnecessary, but the result is that many users won’t get what they need and will therefore not come back to the library to get answers in the future.

Pioneering observational research carried out by Mary Jo Lynch (1978) and Patricia Dewdney (1986) revealed that in fully half of reference transactions, staff members followed the face value rule and bypassed the reference interview. Both Lynch and Dewdney audio-recorded reference transactions in public libraries so that they could look closely at exactly what the users and the staff members said and did. Three things became very clear. Users don’t express their informational needs clearly and completely in their initial question. In half of cases, staff members accepted the initial question at face value and didn’t conduct a reference interview. And when the initial question is taken at face value, users often wind up not getting the help they want. Similarly, in virtual settings, research studies have found higher levels of accuracy when librarians asked “clarifying questions” (either an open question or a closed question) in order to understand the real question. A recent study suggests that the likelihood that a reference interview will be conducted varies by the type and size of institution. LeMaistre, Embry, and colleagues (2012, 261–26) analyzed reference encounters in ten libraries of different kinds. They reported that in small four-year academic libraries, librarians asked at least one clarifying question in almost three-quarters of the cases, whereas in two-year academic libraries and in public libraries, clarifying questions were asked about half the time.

EXERCISE

Is an Interview Needed? Part 2

Compare the 17-second interview in “Is an Interview Needed? Part 1” with this one, conducted by the same librarian in the same library a short time later:

Librarian: Can I help?

User: I have a list of publications [reads from paper]. I don’t know if those are magazines or journals or . . .

Librarian: They’re all magazines [looking at paper]. [Reads names of magazines and gives directions on where to find them.] But before you look at magazines themselves, you’d want to know which particular articles you are looking for. (functions as an open question)

User: Do you have an index?

Librarian: Yeah. Are you looking at a particular topic? (closed question that functions as an open question)

User: Yes. I’m looking at wage restraint in the federal government.

Librarian: Okay. You might want to use the business index. [Explains index; shows index.] Have you used an index before?

User: No.

Librarian: [Explains and instructs. Together they find several headings related to wage restraint. Librarian gives directions on how to find the specific articles on wage restraint in the magazines themselves.]

User: Okay. Thank you. (Dewdney, “Wage Restraint”)
CHAPTER 1

DID YOU KNOW?
Karen Hyman (1999) identified a surefire way to reduce the number of users who put demands on library services. She called it the “Rule of 1965,” but it can easily be updated to the “Rule of 1995.” Under this rule, anything that a library did prior to 1995 is a basic, essential service and everything else is extra, to be offered grudgingly. For example, you offer services that you don’t publicize because too many people might want them. Or you offer virtual reference service (VRS) or form-based readers’ advisory, but the link is three clicks away from the main page, which weeds out all but the most persistent users. You offer chat reference, but only on weekdays from 1:00 p.m. to 4:00 p.m. and only for “ready-reference questions.”

ANALYZE THIS REFERENCE ENCOUNTER

CASE 1: System Routines vs. User Needs

**Librarian:** Can I help you?

**User:** I don't know if it's published anymore, but did you get the *Million Dollar Directory*? The last one published? I want to see the third section.

**Librarian:** No, we don’t. We didn’t subscribe to it.

**User:** Pardon?

**Librarian:** We didn’t subscribe to volume 3.

**User:** You didn’t get it?

**Librarian:** No. The reason is that the companies included were mostly smaller companies not in our area. So we didn’t think we needed it. Did you find a reference to it? (closed question)

**User:** I thought it was here—the brown one.

**Librarian:** The brown one. (acknowledgment) No, that’s a periodical directory. [She explains.] If you need volume 3 of the *Million Dollar Directory*, the university still has a copy in the business library. (referral)

**User:** I can get it if I want it. Okay. Thank you.

(Adapted from Dewdney, “Million Dollar”)

**Comment:** Does this user really need volume 3 of the *Million Dollar Directory*? Maybe not. We'll never know. This 75-second transaction focused almost exclusively on the library's subscription policy. No headway whatsoever was made on finding out what information the user hoped to locate in the *Million Dollar Directory* because the librarian chose not to conduct a reference interview.

In some circumstances, a user absolutely needs to see a specific reference tool and not a substitute (to write a review on it, for example, for a library school assignment). In the majority of cases, however, the requested reference tool is just a way station on the path to finding a specific piece of information. In this case, the question was taken at face value and the user was directed to another distant library. But without conducting a reference interview, the librarian has no way of knowing whether there are other tools within her own library that could have answered the user’s question. The user’s question could quite possibly have been answered by another directory that the library did possess or by an online business directory.

Why the Reference Interview Should Happen in (Almost) Every Transaction

In almost every transaction, one or more questions should be asked to give users a chance to expand on or clarify what they want. Some librarians may complain that they are too busy, but additional seconds spent in finding out the user’s real informational need saves time in the long run. By asking questions, less time is spent by staff in face-to-face (FtF) settings looking for the wrong thing and by staff in virtual settings directing users to the wrong electronic sources or making incorrect referrals.
An important part of providing good service is the desire to understand the user’s perspective. A research study by Patricia Dewdney and Gillian Michell (1996a) called “Mental Models of Information Systems: A Study of ‘Ill-Formed’ Queries Presented in Public Libraries” demonstrates how the users’ initial questions are influenced by their “mental model” of how libraries work. Dewdney and Michell observed and recorded reference transactions in public libraries, conducted in-depth personal interviews with thirty-three adult public library users who had asked for help from a librarian, and later interviewed these same librarians. Among other questions, both the users and the librarians were asked how difficult they thought the question would be at the outset and how hard it actually turned out to be. Here are some of their findings:

1. **Users depend on librarians to help them find the information they need.** Even frequent library users do not have a very accurate or complete understanding of how library resources are organized and how to use them. Despite a general willingness to help themselves, they rely heavily on professional librarians to help them cope with this complexity, which is increasing with new information technology.

2. **Complex informational needs are presented in small libraries as well as in large ones.** Even in small branch libraries, people ask difficult reference questions that require staff assistance. It is important for staff to be able to make effective referrals and to be knowledgeable about the resources in other locations.

3. **Users’ questions may appear to be easy to answer but are often difficult.** Apparently simple requests (e.g., “Can I look at the city directory?”) often mask complex informational needs requiring a range of resources and often a referral. Neither librarians nor users could initially predict how difficult a question might be to answer. Users in general thought their questions were easier than they actually turned out to be. Furthermore, users who thought questions had been easy to answer gave the presence of the librarian as the reason for this assumption. Users thought their questions were easy for the librarians because of the librarians’ skills, knowledge, helpfulness, understanding, technological abilities, and so on.

4. **Nearly half of these questions could not have been answered without the librarian’s help.** About 40 percent of these questions probably would not have been answered completely without the help of a professional librarian. Users often have only a sketchy understanding of electronic information systems. Even when users are knowledgeable about the library system, unexpected barriers may intervene. When the user’s own strategy fails, the user needs a librarian to suggest alternative strategies.

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**DID YOU KNOW?**

Radford and colleagues (2011) analyzed a random selection of 850 live chat transcripts from the QuestionPoint consortium and found that librarians used reference interviews to clarify the question in 75 percent (581) of these transcripts. In those transcripts in which a reference interview was conducted, 66 percent of the questions were closed and 34 percent were open. The most frequently-asked questions were about the topic of the query, background information, and the librarian’s understanding of the user’s question.
5. Users depend heavily on librarians not only to find the information they need, but also to find out how to use the system. Users spoke of “learning one new thing each time I come to the library,” usually through instruction by the librarian.

The data from this study repeatedly showed that the librarian is the key to the information-seeking process for users. The solution to current stresses on library systems is not to reduce the human element but to make it stronger, more efficient, and more effective. The most important resource of a public or academic library is the staff that links people with collections, both virtual and print. The role of librarians as intermediaries between users and information has not diminished; it may actually be even more crucial.

1.3 Beyond 55 Percent

Unobtrusive studies have shown repeatedly that when users ask reference questions in academic and public libraries, they get accurate answers from 50 to 60 percent of the time. So frequently has this result been found that it has been enshrined in the literature as the “55 percent rule,” first articulated by Peter Hernon and Charles McClure (1986) in their analysis of unobtrusive studies of reference service. Unobtrusive observation and testing got its start in the library field when Terrence Crowley and Thomas Childers published their two studies of reference service in 1971. In these two pioneering research reports and the many that replicated their methods, the researcher typically developed a list of questions with a known right answer. A research assistant or proxy asked the questions in a library and tabulated the percentage of correct answers provided. In these studies, the accuracy of the answer given was the single measure used to evaluate the effectiveness of service. Answer accuracy is a popular measure because, like precision and recall, it is a reliable variable that is not dependent on subjective judgments.

More recently, the availability of chat reference transcripts has provided a new arena for evaluating real reference transactions (Pomerantz 2008), but the success rates are not too far off 55 percent. When Kwon (2007, 80) examined the transcripts of some 415 chat reference transactions, coders determined that 56.4 percent achieved “answer completeness.”

Challenges in evaluating reference boil down to two basic issues. The first has to do with determining what to measure. Is the measure to be the correctness and completeness of the answer? Or is it the librarian’s observed use of various recommended behaviors as prescribed in RUSA standards? Or is the measure the user’s satisfaction, as determined by the user? The second issue, which is related to the first, has to do with who gets to judge the quality of the answer—the librarian, or the user? Completeness and accuracy are measures that typically are evaluated from the perspective of librarians. But an answer could be accurate and might still fail, from the user’s perspective, because it was incomprehensible, or it was provided too
late to be useful, or it was provided by a surly librarian. Moreover, many reference questions have a range of acceptable answers, depending on how the user is planning to use the information. Joan Durrance (1989) asked the rhetorical question, "Does the 55 percent rule tell the whole story?" and her answer was "No."

Durrance proposed and tested a new indicator: the user’s willingness to return to the same staff member at a later time. In her study of 266 reference interviews in academic, special, and public libraries, Durrance (1989) found that a user's willingness (or unwillingness) to return was significantly related to eleven interpersonal and search skill variables. She observed that users were “far more forgiving when library staff members had weak interviewing skills or gave inaccurate answers than they were if the staff member made them feel uncomfortable, showed no interest, or appeared to be judgmental about the question” (1989, 35). In fact, in some cases where the answer was rated as largely inaccurate, over one-quarter of Durrance’s users said they would return to that same librarian. Her study raised some interesting questions: Are users more impressed by the demeanor of the librarian than by the quality of the information provided? What factor or combination of factors influences the user’s willingness to return?

In *The Reference Encounter*, Marie L. Radford (1999) examined the factors that enter into users’ perceptions of reference success. Drawing on communication theory, she made a key distinction between the content-oriented dimension and the relational dimension of interpersonal communication. Unobtrusive tests of accuracy measure only the content-oriented dimension. The relational dimension of the reference interaction encompasses the feelings of the participants and their attitudes toward one another and toward the reference encounter itself. Radford gathered the data for her study by observing reference encounters in three different academic library settings and then interviewing both parties. She observed a total of 27 reference encounters, and she audio-recorded and transcribed in-depth interviews with 9 academic reference librarians and 29 users. Her real interest was in users’ perceptions of the reference encounter and, specifically, whether the user’s perception differed from that of the librarian involved in the same interaction. Not surprisingly, there were substantial differences.

According to Radford, users almost always attributed the success or failure of a reference encounter to relational factors. They said the librarian was “nice and helpful and pleasant,” or “went out of her way,” or, contrarily, was “not very patient,” or was “really sour” (1999, 76, 80). In contrast, librarians, especially when discussing successful interactions, were apt to talk about issues of content such as the amount or quality of information available on particular topics. When discussing encounters that were considered unsuccessful, however, librarians focused on the relational factors of feelings or attitudes. Interestingly, librarians explained unsuccessful encounters in terms of the users’ poor attitudes either toward the librarian or toward the task. Users were described as being closed-minded, angry, and interruptive (1999, 76–77).

**DID YOU KNOW?**

In an unobtrusive study of reference service in Suffolk County public libraries on Long Island, Thomas Childers (1980) instructed surrogate users to pose “escalator” questions. The users started initially with a broad request so that librarians would have to use probes to discover the specific questions to be answered. No matter how general the initial question was, in 67 percent of the cases, library staff members asked no questions designed to find out what the user specifically wanted to know. The result was that these staff members got to the last step—the real question—only 20 percent of the time and hardly ever provided an accurate answer. By contrast, the one-third of librarians who did use probes to arrive at the specific question provided an accurate answer 62 percent of the time.
This work on the relational dimension of reference work adds to a growing body of research that acknowledges the insufficiency of answer accuracy as a sole indicator of reference success. Such studies emphasize the importance of other factors, including the relational dimension, and use other indicators such as the user’s “willingness to return” to the same librarian with another question. However, like the unobtrusive studies that use accuracy as the measure of success, these studies have also found a 50 to 60 percent success rate. In the Library Visit Study, which used willingness to return as a measure of reference success, Dewdney and Ross (1994) found that only about 60 percent of public and academic library users expressed a willingness to return. In a replication of the Library Visit study in New Zealand, conducted by Pam Bidwell (2007, 30), the success rate was 50 percent, with the other half reporting themselves as either unwilling to return to the same staff member (31 percent) or unsure (19 percent). The troublesome fact remains that whether we examine public, academic, or special libraries, and whether we measure reference success by answer accuracy or by the users’ willingness to return, the success rate for information service hovers in the 50 to 60 percent range unless there is a concerted effort to improve success.

The good news is that progress is being made. Progress was found in the libraries observed in the Library Visit Study (Nilsen 2006). When we compared the in-person reference transactions in phase 1 (1991–1993) and phase 2 (1998–2000) of the Library Visit Study, we found that overall success rates improved from 60 percent in the earlier period to 69 percent, measured by the willingness of the user to return to the same librarian. Because the Library Visit Study did not measure answer accuracy, this improvement is entirely explained by improvement in the users’ satisfaction with public library service.

The following data compare findings for in-person visits to public and academic libraries in phases 1 and 2, showing the percentage of those who said, “Yes,” they would return:

**Phase 1: 1991–1993 — 100 library visits**
- In both public and academic libraries: 60 percent
- In 71 public library visits: 53.5 percent
- In 29 academic library visits: 76 percent

**Phase 2: 1998–2000 — 161 library visits**
- In both public and academic libraries: 69 percent
- In 111 public library visits: 66 percent
- In 50 academic library visits: 74 percent

The third phase of the Library Visit Study made it possible to compare in-person with virtual reference visits. Phase 3 involved 74 visits to VRS in public libraries and 76 visits to VRS in academic libraries, with 112 participants using e-mail services and 38 using chat services. In all three phases of the research, participants were asked if they would be willing to return to the same in-person librarian or VRS again. The willingness-to-return
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findings for the phase 3 VRS visits are broken down further to indicate both the type of library and the type of service:

Phase 3: 2003–2007—Willingness to return in 150 VR library visits

- In both public and academic libraries: 57.3 percent
- In 74 public library visits: 56.8 percent
- In 76 academic library visits: 57.9 percent
- In 112 visits to e-mail services: 52.7 percent
- In 38 visits to chat services: 71 percent

The success rate for chat services, measured as willingness to return, is much higher than for e-mail services. This difference is quite possibly caused by the relational barriers (see 6.3.1) that are inherent in e-mail transactions in the absence of a well-designed form. Unlike e-mail transactions, chat encounters are synchronous and offer the same opportunity for an immediate back-and-forth exchange and clarification that is available in FtF reference. Successful e-mail reference interviews occur only when libraries provide a well-designed form that users must fill in when submitting their questions. The form acts as a substitute for the reference interview (see 6.3.1).

Radford and Connaway (2013) found improvements in accuracy when they analyzed a randomly selected sample of ready-reference questions and answers from VRS transcripts from OCLC’s QuestionPoint consortium. They found that accuracy had improved from 78 percent correct in 2004–2006 to 90 percent correct in 2010. Their recommendations to improve accuracy included: find out the real question through a reference interview; provide citations along with answers; check for broken links before pushing a URL; make sure that all parts of a query are answered (and multiple queries are answered, if present); and make sure that the specific information requested is actually included, before pushing a general website.

Six Common Causes of Communication Accidents

The reference interview tends to go wrong in predictable ways that can be avoided or at least remedied through the use of basic microskills described in chapters 2, 3, and 4. Avoiding these predictable communication accidents can go a long way toward increasing reference success, well beyond 55 percent. Here are six common problems, together with suggestions for how to avoid them.

1. Not acknowledging the user. Instead, establish immediate contact with users by acknowledging their presence through eye contact and other welcoming behaviors such as smiling and nodding (2.4.2) and by restating the initial question to show that you are listening and want to help (2.4.3).

2. Not listening. The inexperienced interviewer talks more than the experienced interviewer, who does more listening. Librarians
who are talking or thinking ahead about search strategies might be trying to help but they aren’t listening (2.4.5), and they will probably miss important clues. Practice active listening. Pause (2.4.2) or use an encourager (2.4.4) instead of responding at length to everything the user says. To show that you are listening, use appropriate body language and show that you have understood what was said by using the skills of reflecting content or summarizing (3.2.4).

3. **Playing twenty questions.** An open (3.2.1) or sense-making question (3.2.3) such as “What would you like to know about X?” will get you further in less time than playing twenty questions and asking, “Is it this? Is it that?”

4. **Interrupting at inappropriate times.** If you are talking or cutting off a user who is telling you something that’s relevant to the query, you’re not listening (2.4.5). Use pauses or encouragers to signal to users that it’s their turn to talk. When you need to redirect the conversation back to the purpose of the interview, wait until the user finishes and then employ closure: “That’s really frustrating about your parking ticket. Let’s make sure you find what you’re looking for today on your topic X” (3.2.5).

5. **Making assumptions.** Some assumptions are necessary, such as assuming that a user would like some kind of help. But assumptions based on the user’s appearance or on your own perception of the problem are usually inaccurate and may be offensive if you make them explicit. Instead of premature diagnosis (3.2.2), ask sense-making questions (3.2.3) such as “Could you tell me a little bit about how you plan to use this information?”

6. **Not following up.** You can recover from other communication accidents by following up (4.1.3). Ask a closed or open follow-up question such as “Did that help you?” or “What other help would you like?” Even when you’re busy, invite the user to ask for further help or give instructions (“If you don’t find it, ask the person at the Information Desk”). (Ross and Dewdney 1998)

### 1.4 Why Didn’t You Say So in the First Place?

If users were all experts in understanding how information is gathered, organized, and retrieved, they would think about information differently—more like the way librarians do. They would also ask for information differently. But since they are not all experts, they often phrase their informational needs in terms that reference librarians find indirect, incomplete, or misleading. The mirror image of this problem is that your extensive knowledge...
Why Bother with a Reference Interview?

ANALYZE THIS REFERENCE ENCOUNTER

CASE 2: Job Search

User: I'm looking for information on ethnic arts and crafts, especially Mexico.

Librarian: Mmm. There's quite a lot in the section on arts and crafts—745.5. (acknowledgment) Then you would have to find crafts of Mexico. You probably just have to browse through the shelves and see what comes out of crafts of various countries. That's the sort of thing you want, isn't it? (closed question for confirmation)

User: Yes.

Librarian: [Checks catalog.] Okay, there's crafts of Japan, crafts of Mexico, crafts of New England, crafts of Papua New Guinea. They should all be in the same area, but you may have to go further afield for some of them. I'll write these numbers down for you. Crafts of the Indians—you'd like that too?

User: Mmm.

Librarian: Right. That one is crafts of the world, so it should have different crafts in it. And then check these other ones. [Gives directions.] (Dewdney, "Crafts")

Comment: This transaction is a good example of the so-called simple question that some people claim needs no reference interview. In fact, no reference interview took place here, although the librarian may have thought she was offering the user a chance to clarify when she asked the leading question, "That's the sort of thing you want, isn't it?"

When the user was interviewed after this reference transaction as part of the research project, she explained that she was applying for a job where she would need to plan children's programs. She wanted to get some ideas for crafts that were "out of the ordinary" to impress a potential employer. What she really wanted, however, was to be put in touch with "someone who has done this before," so that she could talk to someone involved with arts and crafts programs for children. The user was only "somewhat satisfied" with the service she got and probably would not go back to the same librarian with a similar question. When the user tracked down the call numbers, many of the books were not on her topic. She said she felt that she had been left to sink or swim on her own. She had hoped to get more actual help.

For Discussion

1. How typical do you think this transaction is? What aspects are typical/not typical?
2. Take another look at the librarian's closed question, "That's the sort of thing you want, isn't it?" Why did the user say, "Yes"?
3. What difference, if any, would it have made to the information that the user received had she started out the interview by saying, "I'm preparing for a job interview and I need..."?
4. Was the user right to feel that she had been given very little help? How do you account for the user's assessment of the service provided?
5. How do you think the librarian would rate the success of this interview? What factors would the librarian point to as evidence of success/lack of success? How might the librarian's criteria for success differ from those of the user?
of the library system makes it hard for you to think about information the way that users do. Therefore, it is important to examine how users actually do ask questions. The reference librarian’s job is to be the human intermediary, linking users to the system, and this function involves understanding how users think about information and how they ask questions. In 1968, Robert Taylor wrote a seminal article about this phenomena and coined the term question negotiation to describe the reference interview process.

Consider the following reference requests, which are the initial questions of users who came to various public libraries for reference help. The questions look diverse, but they all have something in common:

- I’m looking for information on ethnic arts and crafts, especially Mexico.
- What I’m looking for is information on stockbrokers—articles that have been written about stockbrokers.
- Where could I find information on a particular company—what they make?
- Is there a listing of companies and addresses?
- Can you tell me where I’d find a directory of museums?
- A friend of mine says that the government has a book out that lists all the different departments—their addresses and all that?
- Can you tell me where the newspapers are?
- Do you have any idea when the next Vancouver Sun will be coming out?

These questions were captured as part of a field study conducted by Patricia Dewdney (1986) in which she audio-recorded and transcribed reference transactions in public libraries. We know more than is usually known about the context of these questions because follow-up interviews were conducted in which the users were asked, among other things, how they hoped the information requested would help them. The element linking these questions is that all of them were asked by job-seekers who needed help to prepare themselves for finding a job. The user asking the question about ethnic crafts was getting ready for a job interview involving programming for children. The question about stockbrokers was really a request for something describing what stockbrokers actually do in their day-to-day work. The user wanted to decide whether being a stockbroker was the sort of job he would enjoy. The questions about the listing of companies, the museum directory, and the listing of government departments were all asked because job hunters needed the names and addresses of potential employers to whom they could send résumés. The users asking for newspapers wanted to find classified job ads.

This juxtaposition of reference requests provides a striking illustration of the way that users typically formulate their questions. None of these users said, “I’m job hunting and I want...” Rather, the three users with questions about ethnic crafts, stockbrokers, and a particular company had a specific...
WHY CAN'T THEY JUST ASK US FOR WHAT THEY WANT?

The library literature is full of guesses and attributions as librarians try to come up with explanations for why users don’t think about information the way they themselves do. Here are some of these explanations:

- Users don’t understand that it is the job of the reference librarian to help get them the right answer.
- Users think that a library is like a supermarket where they are expected to be self-reliant and find everything themselves, and the most they can expect is to be pointed at the right aisle. Therefore, they don’t want to “bother” the librarian.
- Users think libraries are simple. Hence, they could do everything for themselves, if only they had a tiny bit of direction or instruction.
- Users are inexperienced in asking for help because they don’t really expect to get help. They haven’t much confidence in the librarian’s ability to find the information, or even that there is helpful information to be found on their topic or problem.
- Users think that librarians lack the subject expertise to understand their specialized topic.
- Users sometimes avoid self-disclosure, especially with legal, medical, or financial questions. Some want to protect their privacy because the particular topic is sensitive, whereas others generally avoid talking about themselves to strangers, whether the topic is sensitive or not.
- Users are just beginning to explore a subject and don’t really know what they want themselves.
- Users do know what they want, but they can’t articulate it in system terms. Accordingly, they are unclear about what the librarian needs to know in order to be able to help them. Users won’t volunteer information that they don’t perceive as relevant. And they don’t understand the relevance because they don’t know how the system works.
- Users ask overly broad questions because they know that libraries are organized by broad subjects.
- Users don’t know the enormous extent of information available. When they ask for “everything on transportation,” they are not envisioning thousands of items.
- Users don’t know how information is organized and packaged, and they lack the specialized vocabulary to distinguish accurately among different reference tools. They may think that all topics come in book-size packages, and so they ask for a book on topic X, when actually the needed answer is to be found in government statistics or in an online directory or on a web page.
- Users think they are being helpful by suggesting a source.
- Users are unaware of the ambiguity of subject requests (e.g., “I’d like information on fish.” But what information? Catching fish? Cooking fish? Caring for tropical pet fish? Starting up a salmon farm? Diseases of fish? Oxygen transport in fish? The symbolism of fish in Christian iconography?).
- The initial questions that users ask are just a way of starting the conversation.

EXERCISE

Removing Communication Barriers

Consider the communication barriers suggested in the list, “Why Can’t They Just Ask Us for What They Want?” Which of these factors do you think might be barriers for the users of your library? For each factor that you think might be problematic, what solutions can you think of to address the problem? How many are solutions that would need systemwide administrative support? How many are within the control of the individual librarian?
answer in mind, but they phrased their questions as requests for general information on a broad topic. The other users asked questions one step more remote from their original question. Starting with their job-hunting problem, they translated their specific need into a general topic and then prescribed the reference source that they thought most appropriate for their topic—an industrial park listing, a directory of museums, a listing of government departments, newspapers in general, and a particular city newspaper. Unfortunately, the further the presenting question gets from the actual information the user needs to know, the greater the chance of mistranslation, misunderstanding, and mistaken requests for inappropriate reference sources.

On the basis of these initial questions alone, it is unlikely that the librarian would understand what the users really wanted to know. Well, so what? Why be concerned, so long as the librarian provides the list or the directory or the newspaper or the Web source that the user has asked for? Would knowing about the job-hunting context of the question change the kind of answer that the librarian would provide? Well, yes. Surely with at least some of these questions, it would make a difference to know the job-seeking context of the question, but librarians should not ask why directly by querying, “Why do you want to know that?” (for how to find out the context of the question, see 3.2.3).

The rest of this chapter explores, from a variety of perspectives, the contrasts between the ways in which users and librarians think about information.

1.4.1 The Ill-Formed Query

Librarians are familiar with the phenomenon of the “ill-formed” query—a term from linguistics given to a question that doesn’t work because it leads to erroneous inferences. In fact, one experienced librarian in the Mental Models Study said that she had come to expect incomplete or misleading initial questions, remarking, “He was quite specific in what he wanted. He knew exactly what he wanted and that’s what he asked for. And it threw me. Because you’re not used to people asking for what they want.” Over the years, Dewdney and Ross have asked workshop participants for examples from their own experience of cases in which the real question has turned out to be different from the question as initially presented. Participants rarely have any difficulty in thinking of a recent situation. “Yes, it happens all the time,” they say, nodding. From the workshops and other sources, we have collected examples of ill-formed queries and now have a database of 945 examples of question pairs. The list in “What People Really Want to Know” below gives some typical examples of question pairs of the initial question and the negotiated or “real” question.

In a nutshell, the reference interview is needed because the user’s initial question is so often not the real question—or at least not the complete
question. These problematic initial questions, or “ill-formed queries,” are questions that do not state the informational need clearly or completely enough for the librarian to be able to provide a helpful answer. The questions may be perfectly well-formed semantically and syntactically, but in context they are somehow incomplete and even misleading. The key point is that the queries are “ill-formed” with respect to the information system; that is, they do not match the structure or “expectations” of the system.

While every question is different, an analysis of a large collection of ill-formed queries reveals some repeated patterns. Check out some typical examples from the box “What People Really Want to Know.” Here are patterns that we found:

1. Users ask for something very broad and general when they actually want a very specific piece of information within the broad category they have asked for. The example of “anything on housing” falls into this class. Other examples that recur frequently are initial questions that take the following form: “Where do you keep your medical books?” “Where is your law section?” or “What have you got on transportation?” The question “Where is your law section?” can mask many different informational needs requiring different sources (e.g., finding out how to get out of a lease; doing background reading before seeing a lawyer about a divorce; verifying a legal opinion on a problem with a neighbor; researching a project on copyright legislation for a college course). If the initial questions are phrased as directional questions, users will probably not find the specific information they want. The user who asked about the location of medical books was worried about her daughter and she wanted to find out more about anorexia and its diagnosis, treatment, and long-term effects.

2. Users ask for something specific, but there is a mismatch between the specific thing they ask for and what they actually need to answer their question. Often the mismatch happens because users ask for a specific source, thinking that the answer is either there or in that general vicinity, as in examples 2 and 3. Since most users aren't experts on sources, they are often wrong in their diagnosis of the best source. For example, a user who asked, “Where do you keep your encyclopedias?” actually wanted job listings in Australia. The users who asked for books on Canada and books about alcohol in examples 3 and 4 have diagnosed wrongly what the best source would be (the mismatch problem) and then added a second problem by asking for something too broad and general. A variation of the mismatch problem happens when the user is confused about library terms. Requests for bibliographies are often made in error when biographies are wanted, and vice versa.

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**A QUICK TIP**

**Questions about the System**

Often questions about how to use an index or catalog or some other library resource mask the real question. If a user says, "I'm having trouble with this index," it is often helpful to ask, "What are you trying to do?" or "What are you trying to find out?" Here's a case where the librarian did not follow this advice:

**User:** Have you got a book that writes down the Dewey Decimal System? Like in the 700s. I want to copy the divisions for the 700s.

**Librarian:** Do you? Sure. [Gives him the Dewey schedule.] There you go. Start there. (Dewdney, "Dewey")

After the user spent a long time with the book, he came back and asked, "There's nothing in your filing system that gives series? Like a neighbor brought to my door a music book. This book had piano pieces with very simple arrangements by this man Tyndall. I thought the library might have some more of his arrangements."
3. **Users aren’t exactly sure how the library system works** and ask a question based on a misunderstanding or to clarify their confusion. Examples 5 and 6 fall into this class. Sometimes questions about the library system (“I’m having trouble with this index,” or “Excuse me, are the books arranged in any particular order?”) are the users’ way of saying they have run into a barrier and need help—not necessarily bibliographic instruction on how to use an index or understand classification schemes, but rather assistance with finding a helpful answer.

4. **Keywords in the user’s question are ambiguous.** Ambiguity can be caused by either the user’s mispronunciation or the staff member’s faulty hearing. Homophones—words that sound the same but have different meanings, as in example 7—are another source of ambiguity. Consider, for example, bats (baseball bats or the mammal bats), which both sound the same and are spelled the same, with the potential of being a source of ambiguity in both face-to-face (FtF) and virtual questions. In FtF and telephone transactions, pronunciation can introduce misunderstanding, such as the Scottish user whose request for military badges sent the librarian off on a fruitless hunt for military budgies, or the question about venom that turned out to be about the Vietnam War. To demonstrate the range of ways in which confusion can arise, here are some additional examples: Tolkien books/talking books; poultry/poetry; bird control/birth control; hair pieces/herpes; hairdressers in Saudi Arabia/addresses in Saudi Arabia; house plans/house plants; bamboo hearts/baboon hearts; history of jeans/history of genes; gorilla art/guerrilla art; rhapsodies/rap CDs; European manners/European manors; and the source/thesaurus. A request for “something on whales” may be heard as a request for “something on Wales” or, depending on...
Why Bother with a Reference Interview?

the dialect, “something on wills.” China, Greece, Turkey, and Chile are also good candidates for confusion.

Workshop participants have provided us with many examples of ambiguous keywords, some of them humorous: eunuchs/UNIX; tofu/TOEFL; super vision/supervision; reproductive technology (interpreted as artificial insemination)/reproductive technology (pertaining to photocopiers and scanners); makeup (cosmetic)/make-up (psychological). Then there's the old standby that we have heard so often that we suspect it's an urban legend—youth in Asia/euthanasia. One of the best examples of a user's mishearing is the “Oranges and Peaches” incident that provided the title for the Dewdney and Michell (1996b) article on the ill-formed query. A user asks for a copy of Oranges and Peaches, but it turns out that he had misheard the teacher's instruction to find Darwin's Origin of Species.

A further complication that can occur is that the staff member may interpret the ambiguous word(s) in the context of a particular mental set, predisposition, or expectation. For example, one librarian was busy weeding the sports books when he misheard a request for books on Socrates as “soccer tees” and began scanning the soccer books. Another librarian was engaged in bibliographic checking when she misheard a request for books on sea lamprey as a request for books on C. Lamprey, presumed to be an important person.

5. The user's question involves a reconstruction as the user tries to remember specific terms or details and reconstructs the meaning, but not the form, of a forgotten item. Sometimes the reconstruction involves substitutions of synonyms or near synonyms, as in example 8. A user might ask, “Where is your gynecology section?” when the question is really about family trees. A request for information on Trump's closet might be made instead of Trump's cabinet. Users might ask for the book Sex Before Dinner when they want The Naked Lunch. Additional examples to consider include sugar mommy/sugar daddy; IUD/OED; Rockin' Jim/Rock and Gem; the President of Utopia/the President of Ethiopia; the Kingdom of Phylla/an overview of biological classification; Malcolm the Tenth/Malcolm X; chow mein/Charlemagne. This type of problem is more apt to happen with what Melissa Gross has called the “imposed query” (5.3.1), in which the question is generated by someone else such as a teacher, and the user has not completely understood the assignment. For example, the student asks in the library if he can talk to Eric about his research topic, but his teacher has actually said, “See ERIC.”

6. The user's question contains an error or misconception not about the library system itself, but about the outside world. In example 9,
the student might regard anything before 1950 as ancient history, but this view, though understandable, is idiosyncratic and not consistent with accepted conventions of periodization. In this category of ill-formed questions, the error is embedded in the question as a taken-for-granted fact and is not easy to spot without asking a question such as “What are you looking for in ‘ancient history’?”

1.4.2 Mental Models

We can explain the prevalence of ill-formed queries in terms of the users’ mental models of how libraries work. The act of asking a librarian for help is a microcosm of information-seeking behavior governed by the participants’ mental models of the system. A useful theory of mental models suggested by both Donald Norman (1983) and Philip N. Johnson-Laird (1983), experts in artificial intelligence and cognitive science, describes a mental model as a working model that individuals construct in their minds to facilitate interaction with the environment, other individuals, or technology. Such a mental model contrasts with the “real” model or “conceptual model” of the same object, which is, according to Norman, an appropriate representation of the target system “in the sense of being accurate, consistent and complete” (1983, 7).

An individual’s mental model of any system is, by definition, inaccurate and incomplete in relation to the conceptual model. It’s the degree of discrepancy between an individual’s mental model of the system and the conceptual model that is important. When users’ mental models of the library system are at odds with the “real” or conceptual model of the library system, they are more likely to generate ill-formed questions. Librarians, on the other hand, have mental models of libraries that are much closer to the conceptual model. A crucial issue is whether the users’ understanding of the library system—including the collection and its organization, its online resources and the means of access to them, the physical layout, the role of the librarian in the system, and the types of service that users can expect—differs in any important way from the librarian’s understanding of that system. If there is an important difference, does either the librarian or the user discover it, and how does that discovery affect the outcome of the transaction? What can the librarian do to increase the likelihood of discovering such differences?

The mismatch between the user’s mental model and the librarian’s mental model can be used to explain communication accidents and misunderstandings that arise in the reference interview, with implications as described below.
Mental Models of the Library System

Four different users are all looking for color photographs of wild orchids because they want to identify an unusual plant in their gardens. Mary says: “Where's the science section?” Arjun says: “Do you have World Book?” Julia says, “I want information on orchids.” And James says, “I want to see the head librarian.”

All four of these users have a goal, which is to find a color photo of a wild orchid to help identify the plant. All four have a plan to achieve that goal. Underlying the plan is a model that includes various beliefs about the world in general and about library systems in particular. Each person has developed his or her model on the basis of past experience, prior learning, and other factors. Mary’s model of libraries may include some beliefs that can be stated as propositions:

1. Photos of orchids are often found in books.
2. Books can be found in large numbers in libraries.
3. Books in libraries are organized by general subjects.
4. The general subject for orchids is plants, but perhaps this is unduly narrow—so the subject is probably botany or even science. Based on past experience with libraries and their signage, science seems like a good bet.
5. If I can be pointed toward the science section, there will be a book there that contains a photo of a wild orchid. I’ll be able to compare it with the plant in my garden.
6. I should be able to find what I need on my own with a minimum of help. Libraries are self-help places just like supermarkets.

These assumptions are not completely wrong. However, the librarian knows, because of her more accurate model of libraries, that the more efficient procedure is not to start with a broad subject area, because the librarian believes the following propositions to be true:

1. Users don’t always ask for what they want.
2. Not everything to do with science will be classified as science.
3. Science is a huge section. It is inefficient to search for “science books.”
4. If I give directions to the science section, the user will probably not find what she needs.
5. My job is to help users find what they need. Once I find out what the user’s goal is, I can substitute a more effective and efficient plan.
6. The appropriate step is to ask the user what she wants.
7. Photographs of wild orchids can be found easily in a book on wildflowers or online.

When the librarian acts on these beliefs by conducting a reference interview and providing the desired wild orchid picture, she can modify the user’s beliefs or model of the library in a way that will help the user better negotiate her way through the library next time she has a question. She can also show the user how to find images on the Web.

Exercise

Mental Models

Reread the case provided in “Mental Models of the Library System.” We listed beliefs that may have been part of Mary’s model of libraries when she asked, “Where’s the science section?” in order to get pictures of wild orchids. What different beliefs about libraries do you think were held by Arjun, Julia, and James that led each of them to ask their respective initial question?
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