THE REFERENCE INTERVIEW

In the reference process, knowing how to get the question is a critical step toward finding the right answer. Determining the real question is accomplished through the reference interview. The reference interview is a discussion between you and your patron. It involves asking the right questions and listening carefully to the answers.

**Being Approachable and Demonstrate Interest**

In order to have a successful reference transaction, patrons must be able to identify that you are available to provide assistance, and must feel comfortable in going to you for help. Approachability behaviors, such as your initial verbal and non-verbal responses, will set the tone for the entire communication process, and will influence the depth and level of interaction between you and your patrons. At this stage in the process, the behaviors exhibited should serve to welcome the patrons and to place them at ease. Your role in the communications process is to make the patrons feel comfortable in a situation that may be perceived as intimidating, risky, confusing, and overwhelming. By demonstrating a high level of interest in the inquiries of your patrons, you will generate a higher level of satisfaction among users.

Please do:
- Be alert to people approaching a service desk.
- Be inviting to those who appear to be hesitant to ask for assistance.
- Be aware of the traffic, activities, and needs in the area in general.
- Leave the desk to help a patron at a public workstation, either with their research query or if they have technological problems with a workstation or printer.
- Maintain or re-establishes eye contact with patrons throughout the transaction.

Please do not:
- Give the non-verbal impression that you are too absorbed in your own work to be interrupted.
- Be focused on a computer, reading material, writing, or personal discussion with a desk colleague.

**Listening and Inquiring**

The reference interview is the heart of the reference transaction and is crucial to the success of the process. Effective identification of the patron's information needs is essential and must be done in a manner that keeps patrons at ease. Strong listening and questioning skills are necessary for a positive interaction.

As a good communicator, you should use both verbal and non-verbal skills:

**Verbal:**
- Listen to the whole question.
- Restate or paraphrase the question.
- Avoid assumptions about the query and premature diagnoses.
- Ask to see the syllabus for clarification.
- Do not talk down to a patron.
- Do not be flippant or sarcastic; use humor carefully, if at all.

**Non-Verbal:**
- Give patron your full attention.
- Be patient – do not rush or interrupt.
- Make eye contact.
- Avoid distracting, nervous gestures.
- Be relaxed.
- Be non-judgmental.
Things to consider about communication barriers .....  

✓ If you are working with a person with a disability, focus on the person, not the disability. Speak directly to the disabled person, not an assistant who may be accompanying them.

✓ When working with a disabled person or a person for whom English is their second language, if you cannot understand what they are saying, ask them to write it down (unless it is apparent that their disability limits their ability to write).

✓ Also, do not judge a person’s social status, level of sophistication, or intelligence based on appearance. We serve a diverse clientele and we need to be respectful of their differences, whether that difference is patron attitude (demanding, frustrated, angry), culture, or disability.

*If you find yourself in an uncomfortable situation related to any of the above, remain calm and professional and seek assistance from a subject specialist or other staff member.

The Interview Process
Getting to the real information needs requires asking the right questions during the interview. The following methods are recommended:

✓ Paraphrasing: Paraphrase a patron's question by repeating back what the patron said in their words without adding thoughts or questions of your own. This lets the patron hear what the questions sounds like to you and confirms that you've understood what they are saying. It is easy to misunderstand what a user means, to hear incorrectly, or to make assumptions based on questions in the past.

Paraphrasing is a statement, not a question, that lets the patron know that you are listening to them and have heard correctly. At this point you do not want to make any assumptions or conclusions about your own interpretation of what the user wants. Paraphrasing often encourages the user to expand on the question.

✓ Using Open Questions: Open questions help to keep the patron focused on the subject and encourage them expand on their needs, thus eliciting the information the library staff member needs. Encourage patrons to continue by using such statements as “Tell me more,” “Can you expand on that?,” “Could you give me an example?” Other examples include:

  Can you define_______?
  What further clues can you give me?
  What examples can you give me?
  I’m not familiar with_____.
    Can you explain it to me?
  What do you need to know about_______?
  Where did you read or hear about_______?
  Who was_______?
  What sources have you already checked for information?
  What do you already know about_______?

✓ Clarify & Verify: Clarifying with closed questions to get specific details and to refine the question. Verifying to confirm that the exact question has been determined.
The Interview Essentials: Six Pieces of Evidence

In a reference interview, use paraphrasing, open questions, clarifying, and verifying to help identify the user's real information need. What do you want to end up with at the conclusion of the interview? Six pieces of evidence. Much of this information will come out naturally during a good reference interview.

What are the six pieces of evidence?

1. Purpose
2. Deadline
3. Type and Amount
4. Who
5. Where
6. The Basic Question

**Purpose:** Why is the information needed? What does the patron plan to do with it? Material needed for a term paper could be very different from material needed for a five minute speech. You may also wish to see their syllabus, reading the exact assignment can help to clear up uncertainties in what the professor is asking.

**Deadline:** For the assignment question, when is the assignment due, or when does the user need it in order to work with it for the assignment.

**Type and Amount:** How much information is needed? In what form will it be most useful, for example: citation or whole article, book, online book, a web site, photograph or pamphlet? If for an assignment, ask about required resources – the instructor may have requested a specific type and amount of resources to be used.

**Who:** How knowledgeable is the user about the subject, an expert or a beginner? What sources have already been checked and what information does the user already have?

**Where:** Where did the patron hear about this? What is the source? What prompted the question?

**The Basic Question:** What does the user really want to know? If you don't understand, ask, then listen, and use your reference interviewing skills to get to the basic question.

**Follow-Up**

You are responsible for determining if the patrons are satisfied with the results of the search, and is also responsible for referring the patrons to other sources, collections or subject specialists. For successful follow-up, you should:

- Asks patrons if their questions have been completely answered.
- Encourages the patrons to return if they have further questions by making a statement such as “If you don’t find what you are looking for, please come back and we’ll try something else.”
Making a Referral
When you are not sure or do not know which resource to direct a patron to or how to use a particular database or if we own or have access to something, **admit to the patron that you do not know the answer:**

“I don’t know, but I will get someone else to help you.”
“I don’t know, but let me call ______ to find out.”
“I don’t know and, since I’m the only one here, I will leave a message for a librarian to get back to you.”
“Here is the business card for _____ who is the subject specialist in this area.”

Unless the online catalog indicates that an item is checked out or missing, a student assistant should **never** tell a patron that the information or resource that they need is not available without first checking with a subject specialist or other staff member **who may have further suggestions.** KU Library staff **constantly** ask each other questions because we are striving to provide patrons with the best possible information. We may also save the patron time by consulting with the subject specialist.

**Privacy and Confidentiality:**

The needs of library patrons are to be treated with respect and confidentiality. Patrons and their requests should not be discussed outside of a professional context.

**Sources:**


Tips for the Reference Interview developed by Kathy Graves, June 2004; revised ajm 8/2010