Reference Interview Analysis

Using Physical and Virtual Reference Interview Interfaces

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Abstract

Analysis of reference interviews conducted in physical libraries and virtual reference interfaces demonstrate that it is important for librarians to provide the fullest level of service to patrons. The attitudes of librarians towards patrons’ queries are influential in how librarians are perceived and in the decision by patrons to continue to use the services offered by libraries. Librarians bring their own perceptions of the validity of patrons’ questions into the reference interview experience. They also work in an environment where the attempt to impose order on information is brought into contact with the unpredictability supplied by people from many walks of life and with many different types of information needs.
Experiences and Observations

For this analysis, the two physical libraries I chose were part of the San Francisco Public Library system. They were the Main Library (Appendix A) and the Park Branch (Appendix C). For the virtual reference service, I chose the New York Public Library’s “Ask NYPL” service that allowed interaction via telephone, chat and email, as well as providing an option for speakers of Spanish (Appendix B). I chose the chat option.

The question I composed for this analysis was “I’m looking for information on making a career transition”, as I figured that it is a common question. I felt that the way the question was phrased was general enough to allow room for the reference librarian to probe deeper in the course of the reference interview.

For the first physical reference interview I went to the reference desk for the Business, Science & Technology Center on the Main Library’s fourth floor. There were two librarians at the reference desk, and I approached the one who was younger, as I felt more comfortable with someone in my general age range. I was nervous and approached her without saying anything. She looked up, I asked my question, and she probed deeper by asking me to clarify, at which point I said I was thinking of moving into information technology. She consulted with the other librarian at the desk who was older, and whom I took to be her superior. The second librarian recommended that I go to the Jobs & Careers Center that was nearby on the same floor, and that I should browse around in the material located there as that should give me “plenty of food for thought”, and that some of the materials in that section were also available for circulation nearby. At no point did either of the librarians offer to accompany to the resources, nor did I ask them too.
The second reference interview was done online via the New York Public Library’s “Ask NYPL” chat service. I used this service due to the reputation of the library, as well as the fact that I wanted a real time response. The interface was very user-friendly. There was a sidebar on the left where the conversation took place, and in the main section on the right was the co-browser, in which the librarian presented the material that he. This time I was a more proactive. For example when I noticed that the materials being returned based on my query were geared towards physicians, I wrote that I was interested in information technology. Still, the answers were rather general, and I was not guided towards any resources on careers in information technology. Instead, I was shown an article on career change in general, as well as a list of databases where I could find information on careers. At the end of the interview the librarian asked if he or she had answered all my questions, and I said yes, mainly as it felt a bit alienating talking to a machine, and also as I was tired.

The third interview (at the San Francisco Public Library’s Park Branch) was the most productive of all. The librarian came from behind the desk and showed me where the material I was interested in was located, as well as looking through them with me, and pointing out ones that I might find useful. I mentioned that I was interested in information technology, and she pointed out a series of reference books that had a lot of very helpful information, as well as a book on changing careers that I subsequently borrowed. I looked through the reference books at a table and when I returned it to her, I asked if it was available online via the library’s website. She didn’t know, but looked it up and found out that it was. I was most impressed with the service provided, as it was a small, one-room branch library, about which I did not have high expectations.
Analysis

McKenzie (2004) studied data collected from MLIS students at the University of Western Ontario who posed as patrons asking reference questions at various types of libraries. She focused on the situations where there was more than one librarian on hand to potentially help a patron. Her study revealed that many times, the librarians either seemed more interested in doing their own work, or saw the patron as a task to be taken care of. Conversely, however, there were occasions when the students were approached by librarians who saw that their colleagues were busy, and who then proceeded to offer assistance. This was a much more positive experience.

McKenzie also mentions Section 5.4 of the Guidelines for Behavioral Performance of Reference and Information Service Providers (Reference and User Services Association, 2009) that states that proper behavior is for a librarian to consult with another librarian or expert when he or she does not know the answer.

This did indeed take place during my interaction at the San Francisco Public Library’s Main Library. The first librarian did ask her colleague at the desk for assistance, at which point the second librarian seemed to take over the interview process. McKenzie’s study also mentions that it is important for librarians to have a good interpersonal working relationship, which indeed seemed the case in this situation.

Ross, Nilsen and Dewdney (2002, pp. 43-66) discuss the importance of being approachable by use of posture, smiling, and scanning the area periodically to see if there are patrons who need assistance. Neither librarian in this case seemed to be demonstrating any of these means to indicate their approachability. The first librarian seemed somewhat hidden by her computer. My impression was also that she seemed to
be slouching, though this may have been the effect produced by sitting on a stool for long periods of time. My personality is such that I do not often speak up if a librarian or other service staff does not notice me, but wait to be noticed first. However, she did notice me as I walked up to the desk, and asked if she could help me, though she did not smile. She also seemed visibly confused by my question, and I felt that she was a bit annoyed that she had to ask for clarification. She did, however, stop what she was doing to address my question.

Whitlatch (1990) points out that library patrons are actually a source of unpredictability in a system that is geared towards uniformity in the management of information. A librarian, therefore, must be prepared for any kind of question at any time. Librarians also bring into the interaction their personal judgments as to what kinds of questions are considered valid. The librarian I queried may have felt that the question was “not interesting enough” to warrant more active intervention on her part. It could also be that the fact that there was a designated resource for job seekers nearby provided what to the librarians must seem to be an easy answer to a common question.

The colleague whom she approached for assistance had not looked up when I approached the desk, and seemed content to give directions to where the resources were located. They did not assist me in searching for any of the resources. I did not feel comfortable asking for more direct assistance, partly due to their demeanor (i.e., they seemed to be very engrossed in their work), so I left the reference area.

The second reference interview, done online via the New York Public Library’s “Ask NYPL” chat service, demonstrates what Paster and Osif (1992) describe as a library acting as a “gateway” that provides patrons with access to electronic resources that may
be beyond their reach. This is true today, even taking into account the fact that the scope of electronic reference resources as well as the degree of access to them has expanded exponentially in the period of time since their study was published. Aside from the online public access catalog (OPAC) that is available without charge to the patron via the Internet, libraries still provide access to databases and journal articles to holders of library cards.

I admit that I was reluctant to use the service as, despite my knowledge of and experience with the Internet, this particular service still seemed new to me, and I was afraid that it wouldn’t work. However, the reputation of the New York Public Library is such that I tend to trust a service that they provide. The initial interface served to allay these fears, as it was somewhat prominently displayed on the library’s home page. The “Ask NYPL” page itself was designed in an easy-to-read style that also increased the approachability factor, thus tending to alleviate anxiety on the part of the user.

The chat feature did not state its question and answer policies anywhere on the website, nor did it indicate how long the process would take (Reference and User Services Association, 2009, Section 2.8). Once I had entered the chat feature, I was told that there would be a brief delay before the librarian would be available, and that I could ask my question. However, due to my anxiety with using this system for the first time, I asked the question first, before the librarian arrived.

The librarian actually asked only two questions, the first of which was “Are you trying to find books?” Once he had started the process, he did not ask any more questions, and it was up to me to clarify what I was looking for. At one point I had to ask him if he was still there as it had been about seven minutes since he had posted any
statements in the dialogue box. The second question was asked at the end, when he asked, “Does it answer your question?” after he had posted an article in the co-browser. The librarian did indicate that the service was available should I need it again, though he did not suggest that I visit the physical library (Reference and User Services Association, 2009, Section 5.9).

The co-browser feature was actually a good demonstration of how technology can be used to make a somewhat unfamiliar setting such as the chat room more accessible, by providing a view of a familiar environment, such as a web page in a section of the patron’s browser window. As I had entered my email address at the beginning of the process, I was able to receive a transcript of my chat, which contained the URLs of one of the articles I was shown, as well as the page listing databases that could be of use. The fact that the URLs still worked independently of the chat room meant that I was able to follow up with the resources I had been given at any time, which was very helpful.

The interview at the San Francisco Public Library’s Park Branch was almost the perfect reference interview experience. The librarian stepped away from what she was doing to assist me and lead me to the resources, as well as point out specific resources. Though she did not actually ask if my question was answered, she did say that these sources could be of help in difficult times such as these, which was a rather personable remark, and made me feel like I was speaking with a “real person” who was actually interested in my situation. Whitlatch (1990) reports that the warmth displayed by a librarian as well as the interest shown regarding the patron’s query has a positive impact on the patron’s experience and will make the patron more likely to return to that librarian for future queries.
Conclusion

The attitude of the reference librarian and their willingness to provide as much assistance to patrons as possible is vital given the crucial role that libraries play in providing access to knowledge and information not always available to the general public. The perception that the librarian is not only able to help, but is also interested in helping, is one that will influence the decision of patrons to choose to continue to use – and value – libraries.
References


Appendix A

Physical Library Reference Observation Form

Name: San Francisco Public Library – Main Branch - 100 Larkin Street, San Francisco, CA 94102

Type of Library: Public – Reference and Circulating

Date and Time of Interview: 4/12/2009 – 3:15pm

Question Asked: “I’m looking for information on making a career transition”

Your Actual Question: “I’m looking for information about making a career transition”

Was the reference desk visible and easy to identify? YES

Describe the reference desk area...was it an approachable place?

Yes it was located directly in front of the main stairway on the 4th floor, just to the right when you come out of the elevator bank. It had a large sign that said [look up later]

Was the librarian approachable? Did he/she indicate approachability through:

<table>
<thead>
<tr>
<th>Eye contact</th>
<th>Yes</th>
<th>No</th>
<th>Unsure</th>
</tr>
</thead>
<tbody>
<tr>
<td>Smiling and nodding</td>
<td>Yes</td>
<td>No</td>
<td>Unsure</td>
</tr>
<tr>
<td>Posture</td>
<td>Yes</td>
<td>No</td>
<td>Unsure</td>
</tr>
</tbody>
</table>

The librarian got up from her stool when I approached with my question

Did librarian indicate interest in your and your query through:

<table>
<thead>
<tr>
<th>Encouraging Comments</th>
<th>Yes</th>
<th>No</th>
<th>Unsure</th>
</tr>
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<tr>
<td>Smiling and nodding</td>
<td>Yes</td>
<td>No</td>
<td>Unsure</td>
</tr>
<tr>
<td>Posture</td>
<td>Yes</td>
<td>No</td>
<td>Unsure</td>
</tr>
</tbody>
</table>

Did the librarian conduct the interview using:

<table>
<thead>
<tr>
<th>Open questions</th>
<th>Yes</th>
<th>No</th>
<th>Unsure</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hypothetical Questions</td>
<td>Yes</td>
<td>No</td>
<td>Unsure</td>
</tr>
<tr>
<td>Closed questions</td>
<td>Yes</td>
<td>No</td>
<td>Unsure</td>
</tr>
</tbody>
</table>
Did the librarian include you in the search process by:

**Explaining what he/she was doing**  
Yes  No  Unsure

Yes, she told me she was going to consult with another librarian nearby.

**Providing Instruction**  
Yes  No  Unsure

**Seeking clarification during the search**  
Yes  No  Unsure

She did not provide any specific resources but directed me to the section where I could find information.

**Identifying sources**  
Yes  No  Unsure

How did the librarian communicate the information?

**Provided name of source orally?**  
Yes  No  Unsure

**Accompanied and found answer in source?**  
Yes  No  Unsure

**Gave answer orally?**  
Yes  No  Unsure

Did the librarian follow up by:

**Offering additional help?**  
Yes  No  Unsure

**Asking if the response complete answered your question?**  
Yes  No  Unsure

**Checking on you after you left the desk?**  
Yes  No  Unsure

Was the environment conducive to good reference service?  Why or why not?

Yes. As mentioned above, the reference desk is centrally located, with plenty of open space around it, meaning one doesn’t have to navigate obstacles to get to it.

Were you satisfied with the answer to your query?  Why or why not?

Not really. After my initial question, I narrowed the focus career transitions to jobs in information technology, whereupon the librarian consulted with a second librarian, who pointed in the direction of the Jobs and Career Center, and indicated that there were plenty of resources there for me to browse through to get ideas. She also pointed in the general direction of where some of those resources were available to be checked out. I might have preferred her to accompany me to actually identify sources particular to my needs.

Were you satisfied with how your query was handled?  Why or why not?

They were friendly and answered my question, but did not seem to be interested in stepping away from the reference desk to assist me further.

Are there aspects of this librarian’s behavior that you would like to emulate?
Consulting with another librarian or staff professional when I’m unsure of the answer.

**Are there aspects of this librarian’s behavior that you would like to avoid?**

Not taking the time to accompany me to the location where resources are located and helping me identify resources based on clarification of my query (e.g. that I was interested in information technology.

**Would you return to this librarian?**

The fact that it is such a large library makes me wonder if I would even see or recognize the librarian if I saw her again, but I might return to her in the hopes that she may recognize me and thus be open to providing further service.

**Other comments?**
Appendix B

Virtual Reference Observation Form

Name: New York Public Library

Service (Name and URL): Ask NYPL/Chat With A Librarian (http://nypl.org/questions/chat.html)

Format: Asynchronous (email) or Synchronous (chat)

Date and Time of Interview: 4/15/2009 - 9:00pm

Question Asked: “I'm looking for information on making a career transition”

Your Actual Question: “I'm looking for information on making career transitions.”

Was it clear when you entered the site that you could submit individual questions? YES

Was it easy to find the virtual reference desk on the web site? Yes. It was easily visible at the upper right hand of the library’s main page (http://nypl.org/). It was listed as “Ask NYPL” and was the first item under the “Services” heading.

How many clicks did it take to get to the place where you could ask your question? 3: two clicks to get to a page where you enter your name, as well as giving you the option to enter an email address. Entering an email address allows you to receive a transcript of your chat. After you enter your name and/or email and click “Chat”, you are brought to another window that has the chat interface.

Was the librarian approachable? Did he/she indicate approachability through:

- An attractive design (appearance) Yes No Unsure
- User friendly language Yes No Unsure
- Effective design (usability) Yes No Unsure
- Immediate response (even if automatic) Yes No Unsure
- Providing identification Yes No Unsure

Did librarian indicate interest in your and your query through:

- Neutral Comments Yes No Unsure
- Emoticons Yes No Unsure
<table>
<thead>
<tr>
<th>Use of your name</th>
<th>Yes</th>
<th>No</th>
<th>Unsure</th>
</tr>
</thead>
<tbody>
<tr>
<td>Language</td>
<td>Yes</td>
<td>No</td>
<td>Unsure</td>
</tr>
<tr>
<td>Did the librarian conduct the interview using:</td>
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<td></td>
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</tr>
<tr>
<td>Open questions</td>
<td>Yes</td>
<td>No</td>
<td>Unsure</td>
</tr>
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<td>Yes</td>
<td>No</td>
<td>Unsure</td>
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<tr>
<td>Closed questions</td>
<td>Yes</td>
<td>No</td>
<td>Unsure</td>
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<tr>
<td>If a form was used, did it include:</td>
<td>N/A</td>
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<tr>
<td>Open questions</td>
<td>Yes</td>
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<td>Did the librarian include you in the search process by:</td>
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<tr>
<td>Explaining what he/she was doing</td>
<td>Yes</td>
<td>No</td>
<td>Unsure</td>
</tr>
<tr>
<td>Providing Instruction</td>
<td>Yes</td>
<td>No</td>
<td>Unsure</td>
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<tr>
<td>Seeking clarification during the search</td>
<td>Yes</td>
<td>No</td>
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</tr>
<tr>
<td>Identifying sources</td>
<td>Yes</td>
<td>No</td>
<td>Unsure</td>
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<tr>
<td>Using a co-browser to demonstrate</td>
<td>Yes</td>
<td>No</td>
<td>Unsure</td>
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<tr>
<td>How did the librarian communicate the information?</td>
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<tr>
<td>Provided name of source</td>
<td>Yes</td>
<td>No</td>
<td>Unsure</td>
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<tr>
<td>Provided a link to a source</td>
<td>Yes</td>
<td>No</td>
<td>Unsure</td>
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<tr>
<td>Gave answer</td>
<td>Yes</td>
<td>No</td>
<td>Unsure</td>
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<tr>
<td>Used a co-browser to find answer together</td>
<td>Yes</td>
<td>No</td>
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<td>Did the librarian follow up by:</td>
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<td></td>
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<td>Offering additional help?</td>
<td>Yes</td>
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<td>Asking if the response complete answered your question?</td>
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<td>Was the environment conducive to good reference service?</td>
<td></td>
<td>Why or why not?</td>
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There were long periods of silence, and at one point I asked the librarian if he/she was still there, at which point he/she explained that they were helping multiple users. I think this would make it difficult to provide in-depth service.

Were you satisfied with the answer to your query? Why or why not?

Not really. I felt more that I was pointed in a general direction, rather than given more specific info. At one point in the chat I pointed out that the books being listed in the search result were geared towards physicians, and I requested information about careers in information technology. I was pointed towards a list of databases.

Were you satisfied with how your query was handled? Why or why not?

Not entirely. I think I was expecting more one-on-one behavior.

Are there aspects of this librarian's behavior that you would like to emulate?

I admired the fact that he/she had knowledge of the resources and was able to summon them rather quickly.

Are there aspects of this librarian's behavior that you would like to avoid?

It was hard to tell sometimes if I was talking to a person or a machine. The librarian stated his/her name as "Al (24/7 Librarian)". At first I wasn’t sure if it was short for Albert or Alfred, or if it was really A.I., thought it turned out that it really was "Al". It made the whole experience feel as if I was talking to a computer.

Would you return to this librarian?

Only for the speed of service.

Other comments?

I have a feeling that a user would have to be really comfortable with this interface in order to try it. I found it’s a good method for being pointed in the right direction, but am concerned about those users who have a limited personal information infrastructure and who thus require more hands-on guidance. I think they would gain more by going to a physical library. I feel as if this service is more of an adjunct to those who need information quickly then those who need in-depth research assistance.
Appendix C

Physical Library Reference Observation Form

Name: San Francisco Public Library – Park Branch - 1833 Page Street, San Francisco, CA 94117

Type of Library: Public Branch Library

Date and Time of Interview: 4/18/2009 – 2:50pm

Question Asked: “I’m looking for information on making a career transition”

Your Actual Question: “I'm looking for information on careers…making a career transition”

Was the reference desk visible and easy to identify?

Yes

Describe the reference desk area...was it an approachable place?

There was no reference desk as such. There is a circulation desk to the left as you walk in the main entrance, which is used for circulation, reference, and storing books on hold for patrons. It was easily approachable.

Was the librarian approachable? Did he/she indicate approachability through:

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Did the librarian include you in the search process by:

- Explaining what he/she was doing: Yes  
  No  
  Unsure
- Providing Instruction: Yes  
  No  
  Unsure
- Seeking clarification during the search: Yes  
  No  
  Unsure
- Identifying sources: Yes  
  No  
  Unsure

How did the librarian communicate the information?

- Provided name of source orally? Yes  
  In writing? No  
  Unsure
- Accompanied and found answer in source? Yes  
  No  
  Unsure
- Gave answer orally? Yes  
  In writing? No  
  Unsure

Did the librarian follow up by:

- Offering additional help? Yes  
  No  
  Unsure
- Asking if the response completely answered your question? Yes  
  No  
  Unsure
- Checking on you after you left the desk? Yes  
  No  
  Unsure

Was the environment conducive to good reference service? Why or why not?

Yes. It was quiet and not crowded or busy. However, there was no specifically designated reference desk (i.e. a desk set aside solely for reference queries).

Were you satisfied with the answer to your query? Why or why not?

Yes. The staff person actually walked with me to where the resources were located and pointed out specific resources which might be helpful.

Were you satisfied with how your query was handled? Why or why not?

Yes. I’m happy that she took the time to show me resources.

Are there aspects of this librarian’s behavior that you would like to emulate?

Personal aspects with patron. Taking time to assist the patron (e.g. stepping away from the desk to help the patron).

Are there aspects of this librarian’s behavior that you would like to avoid?

I can’t think of any.
Would you return to this librarian?

Yes.

Other comments?

The entire transaction took roughly four minutes from the initial query to identification of resources. When I was done, I saw her sitting at a desk in the children's section, and asked her if one of the resources she had pointed out was available online through the SFPL website. She did not know, but took the time to look it up and find out. The answer is that it is available online.
Author’s Note

Jonathan Leff is a Master’s student in the San Jose State University School of Library and Information Science. Any queries regarding this paper may be addressed to jleff@comcast.net.