

EXCELLENT REFERENCE SERVICE

Montana State Library Training
August 29, 2009
Wibaux Public Library

WHAT'S THIS SESSION ABOUT?

- ◉ Understand what types of questions patrons are asking
- ◉ How to conduct a positive and helpful reference interview
- ◉ How to locate and use appropriate resources for finding answers
- ◉ How to adapt the process to the virtual environment
- ◉ What do we need to keep in the library reference collection

REFERENCE SERVICE

- ⦿ Meets information needs of community
- ⦿ A variety of information needs: product evaluations, readers' advisory, health information, government information, How-to-do-it (fixing a car, building a swing set, baking a cake, etc), personal enrichment, work, school
- ⦿ Information Services may include searching and Information Literacy instruction

THE REFERENCE PROCESS

- ◉ Outreach
- ◉ Conduct interview to determine the information need
- ◉ Use reference sources to fulfill need - provide answers, citations, or referral if necessary
- ◉ Follow up by making sure the need has been met

SERVICE OUTCOMES

- User gets the information needed
- User is satisfied with the interaction
- User learns something about how to find and evaluate information

TYPES OF REFERENCE QUESTIONS

- ◉ Ready Reference questions that can easily be answered using 1 or 2 sources such as an atlas, dictionary, thesaurus, encyclopedia, almanac, or statistical abstract
- ◉ Title Searches that can be done using a library collection, statewide resource sharing, or library consortia
- ◉ Research information that uses books, electronic databases or Internet

THE REFERENCE TRANSACTION

Behavior, the interview, the search &
follow-up

BEST REFERENCE BEHAVIOR

- ◉ Greet the patron by name or title when known
- ◉ Show receptive, cordial listening - give the patron your full attention
- ◉ answer/clarify
- ◉ Keep the patron with you on the search, or keep patron updated on the status of the request
- ◉ Use proper spelling and grammar, avoid use of lingo

MORE GOOD BEHAVIOR

- ⦿ Relay information carefully - cite sources
- ⦿ Respect the patron's privacy
- ⦿ Make sure the patron's question was answered completely
- ⦿ Identify yourself according to policy guidelines
- ⦿ Ask patrons to return if they need additional assistance

WHAT'S MOST IMPORTANT TO USERS?

According to RUSA Reference Guidelines:

- ◉ Approachability
- ◉ Showing Interest
- ◉ Listening/Inquiring
- ◉ Searching
- ◉ Follow-up

THE REFERENCE INTERVIEW

Why is it so hard for some people
to
express an information need?

WHAT DOES THE PATRON REALLY WANT TO KNOW?

Skills and Tips for a successful reference interview:

- ◉ Ask open questions
- ◉ Practice active listening
- ◉ **Clarify** - the request by paraphrasing
- ◉ **Verify** - restate the question and ask the patron if it is the correct question
- ◉ At the end of the interview, you should have...

...AN UNDERSTANDING OF THE PATRON'S REAL INFORMATION NEED

1. Purpose - why is the information needed?
2. Deadline - when is the information needed?
3. Type and amount - how much and in what format is the information needed?
4. Who is asking and how much do they already know?
5. What is the real question?

THE SEARCH

Once you know what the information need is, you can use a search strategy to find the most appropriate resources

FINDING THE RIGHT INFORMATION

- ◉ What are the most appropriate resources to consult?
 - Tools you have on hand: books, magazines, indexes, pamphlet files, library catalogs, other libraries and institutions, govt. agencies, universities, online databases, persons inside and outside the library
 - Know recommended web sources in your library; how they relate to the library collection and how they are organized

SEARCH STRATEGIES - INDEXES

- ◉ Indexes are finding tools that help you find whole works, parts of works, parts within works, topics within individual works, quality web sites.
- ◉ Can also use table of contents
- ◉ Library catalogs are indexes
- ◉ Back of book indexes help you find information for which there is no special article or heading

SEARCH STRATEGIES - SEARCH TERMS

- Start with a broad concept then break the concept down into parts - can the question be restated or organized differently? Consider index terms - keywords and subject headings; use synonyms, broader and narrower terms
- Try to think of as many terms as you can for your concept, then try them all
- Keep track of the terms used on a reference work sheet and pass the list on if you refer the question

WEB SEARCH STRATEGIES

- ◉ Successful Search strategies require knowledge of subject terms used in invisible web sources and knowledge of how search engines work
- ◉ Invisible web (library catalogs, databases) uses controlled vocabulary of subject headings
- ◉ Search engines use keywords and algorithms
- ◉ Choose your search engine carefully. Search engines are indexed in different ways - know the differences and don't just rely on one

KEEP A RECORD OF YOUR SEARCH

The Reference Worksheet

- ◉ Question (s)
- ◉ Interview information
- ◉ Search information - terms used
- ◉ Sources used
- ◉ (other librarians can use this information if question is referred, repeated or refined)

DON'T FORGET TO TAKE THE PATRON WITH YOU

- ⦿ Keep patron informed during the search
- ⦿ Update them often - maintain contact
- ⦿ If you must be gone somewhere else looking, provide a resource for patron to review
- ⦿ Good opportunity for Information Literacy instruction

FINDING THE RIGHT INFORMATION

- Use authoritative sources

- Evaluate resources carefully

In print - author, publication date, edition, title, intended audience, coverage, writing style

On the web - author, content, domain name (.edu,.org,.gov), date of last revision, objectivity, authority, accuracy

- Accuracy and Currency - if material at hand is outdated, offer the patron a source for updated information

EVALUATE SOURCES

- ⦿ Check facts
- ⦿ Name the source before giving out information - provide citations
- ⦿ Always cite sources
- ⦿ Add value to the information you provide through annotation and pathways
- ⦿ Consult experts - identify people who can answer better

CITING SOURCES

“Can you tell me
when Valentine’s Day is?”

- Why is it important to cite sources?

FOLLOW-UP

The conclusion of the reference transaction involves finding out if the patron's question has been answered and inviting the patron to return.

- ⦿ “Does this completely answer your question?”
- ⦿ “Do you need any additional information?”
- ⦿ “Please let us know if we can be of further assistance.”

WHEN TO REFER?

- ◉ When you don't have or can't find an answer
- ◉ When someone else (an expert) can answer more accurately and quickly
- ◉ Refer patrons to local agencies & groups
- ◉ When patrons want immediate answers, referral is especially touchy
- ◉ Follow guidelines in policy

THE LIBRARY REFERENCE COLLECTION

Today, most reference service involves use of electronic sources

- ⦿ “What do we need to keep in hard copy?”
- ⦿ The format-based reference collection
- ⦿ The library reference collection should contain information needed to answer questions expected at a particular library

REFERENCE GOES VIRTUAL

Special considerations in the online
environment

IT'S DIFFERENT IN THE ONLINE ENVIRONMENT!

- ◉ Why is it harder to interact in an online environment?
- ◉ How can you be approachable?
- ◉ How do you demonstrate listening behavior?
- ◉ How do you stay with your patron?

PROVIDING EXCELLENT ONLINE SERVICE

- ◉ Set aside other projects
- ◉ Address patron my name if known
- ◉ Show interest and humor, if appropriate
- ◉ Ask questions and pay attention to answers (active listening)
- ◉ Maintain word contact - let the patron know what you are doing
- ◉ Remember to follow up

DEALING WITH PROBLEMS

- ⦿ Inappropriate questions and comments
- ⦿ Impatience - patrons want immediate answers
- ⦿ Silence or connection problems
- ⦿ Does your policy provide guidelines on dealing with problem situations?

ASK MONTANA RESOURCES

- ◉ Ask Montana website:

<http://askmontana.org>

- policies
- tips
- training materials

PRACTICE QUESTIONS

- ⦿ “A few years ago I read about a study of library reference services and how often librarians actually provided a correct answer. They called it the ___% rule. What percentage is it? I’d like information about that study or ones like it.
- ⦿ “I’ve heard that studies show patron satisfaction with reference service depends more upon their experience of the reference transaction than the accuracy of the answers they receive. Is that true?”

QUESTIONS?

Thanks for your attention

Lauren McMullen

lmcmullen@mtlib.org

Tracy Cook

tcCook@mtlib.org