

Practicing Reference . . .

Teaching the Art of the Reference Interview*

Mary Whisner**

Ms. Whisner focuses her attention on a skill that is used in virtually every interaction with a patron—the reference interview—and offers suggestions on training novice librarians to conduct them effectively. An appendix includes a list of tips on conducting an effective reference interview.

¶1 One of the joys of my job is training, working with, and mentoring people who are new to reference work. The Gallagher Law Library employs as interns many of the students enrolled in the law librarianship program at the University of Washington Information School. The interns work in technical services, in access services, and in my department, reference.

¶2 Many of the students arrive with very good legal research skills which they developed in law school and practice. Then they are required to take two quarters of legal research, where they get more training and practice. In addition, we teach them some research skills during their time in the reference office, for instance, walking them through the steps of researching Washington state legislative history.

¶3 But research skills are just a part of being an effective reference librarian. Transferring calls and changing the toner in the printer are examples of the many practical skills that, though frequently used by reference librarians, are not taught in library school. In this essay, I would like to focus on how we train students in a skill that is used in virtually every interaction with a patron—conducting a reference interview.

¶4 The reference interview includes many aspects of the interaction between reference worker and patron. How do we make it clear that we are available to help? How do we find out enough about what the patron needs to know so that we can work on the question? How do we instruct the patron in research skills? How do we direct the patron's question toward areas in which it is appropriate for us to respond (as opposed to, say, asking for what amounts to legal advice or psychotherapy)? How do we know whether we are helping?

* © Mary Whisner, 2002.

** Assistant Librarian for Reference Services, Marian Gould Gallagher Law Library, University of Washington, Seattle, Washington.

¶5 We use many approaches to train students in this complex art. Their training begins outside the reference office, in a seven-hour program we call Reference Camp.¹ After introductions, we begin with the mission of the Gallagher Law Library.² Rather than taking for granted that they know what reference service is all about, we describe several of the ways reference librarians (and reference interns) help patrons use the library:

Reference librarians *direct*.

- “The copy center is on the fourth floor.”
- “The restrooms are along that wall.”
- “The ALRs are at KF132 in the reference stacks.”

Reference librarians *instruct*.

- “Let me show you how you can search for law review articles using LegalTrac.”
- “Here’s how you can see whether your CFR section has been amended.”

Reference librarians *advise* on research strategies and sources.

- “You might try a hornbook or treatise for that question.”
- “The BNA Tax Management Portfolios would be a good source for your question.”

Reference librarians *refer*.

- “We don’t have the text of United Nations resolutions, but the Government Documents Department at the main library does.”
- “For the trial transcript of that case, you should call the Alameda County Superior Court—here’s the number.”

Reference librarians *provide information*.

- “According to *Who’s Who in America*, Chief Justice Rehnquist graduated from Stanford Law School.”
- “The phone number for the Washington State Bar Association is (206) 727-8200.”

1. The first two years we offered Reference Camp, it was a one-day program. This year, because of scheduling conflicts, it was offered on two consecutive afternoons.

2. “The primary purpose of the Marian Gould Gallagher Law Library is to support the curricular and research needs of the University of Washington School of Law. The law library’s collections and services are available to the University of Washington community at large. As a publicly supported institution, the law library makes its resources available to the general public, including the legal, business, and academic communities of Washington State and to all libraries through cooperative agreements. Financial resources and academic priorities may limit services and materials to secondary patrons.” MARIAN GOULD GALLAGHER LAW LIBRARY, UNIV. OF WASH. SCH. OF LAW, LAW LIBRARY MISSION STATEMENT (1992), <http://lib.law.washington.edu/dir/mission.html>.

¶6 We follow this affirmative list of what we *do* with a discussion of the limits we set—for instance, we do not interpret the law or offer legal advice, and we do not do students' homework for them.

¶7 Students listen to the lecture politely, but the information is still somewhat abstract for them. The next segment of Reference Camp makes the points much more vividly, through improvisational acting. Two or three of us play the role of reference librarian (a role that should come easily to us), while Nancy McMurrer, our best thespian, plays multiple roles, based on patrons she has met—pro se patrons, professors, attorneys, and undergraduates. She “telephones” or approaches each reference librarian with a question, well-articulated or not, and the reference librarian conducts the reference interview. We reference librarians do not know the questions in advance, any more than we know in advance what our real patrons will ask us. Sometimes we intentionally play a “bad” reference librarian, treating the patron (Nancy) rudely or answering her questions with jargon that she (in her role as patron) clearly does not understand. Then we try again, showing what a difference a good reference interview can make. We all have some laughs and the students learn important lessons.

¶8 Later in Reference Camp, the students conduct short reference interviews in two separate exercises. In the first exercise, “Reading Room Adventure,” Ann Hemmens and I give them index cards with questions on them (e.g., “Where can I find the *United States Code*?” “Where can I find this case? My textbook had these numbers and letters in the footnote.” “Where is the men’s room?”). The interns work in pairs to find the answer and come back to tell us how they would direct us to the source, starting from the reference office. We sometimes ask them follow-up questions (e.g., “Do I have to read the case in both *Washington 2d* and *Pacific 3d*?”) to simulate the reference interaction further.

¶9 The second exercise takes place at computer terminals in our legal research training center. By this point in Reference Camp, the students have had hands-on sessions to learn about our Web site and our catalog (as well as some other resources). Now they sit at terminals and take “phone calls” from a couple of us librarians asking typical telephone reference questions: “Do you get *Business Lawyer*?” “Do you have a civil procedure book where one of the authors is Mary Kay Cain?” (It’s really Kane.) “Can you run a LexisNexis search for me?” “I’m not a law student. Can I still use your library?” The students ask us clarifying questions, provide information, and explain policies. In short, they are conducting reference interviews.

¶10 All of this occurs before the students take their first shift in the reference office. Once they start working there, the interns have many opportunities to observe the librarians they work with and to develop their own reference interview skills. We have them work with each librarian in the department so that they can observe a variety of styles. There is no one perfect way of being a reference librarian, but each of us models friendly, professional, competent service. Students develop their skills by practicing them. They reflect on how their interactions went

by discussing them with the reference librarians who, in turn, offer feedback to the interns: “You were very patient with that patron on the phone.” “Going out to the reading room with that man was very good. He needed your help to see how the index related to the main volumes of that set.” “I’m not sure that student understood what you meant when you said to try LegalTrac. She’s still sitting at the terminal—maybe you can check with her.” “When that guy came in, I assumed he was a law student. You were right to ask and find out he was an undergraduate before suggesting he use Westlaw.”

¶11 To complement all of these training methods—simulation, demonstration, and practice—we give the interns a handout with tips on conducting an effective reference interview.³ For me, the hardest lessons are in the first tip, which includes advice about body language and nonverbal cues. In our reference office, we have a wall of books behind the desk and, very often, I need to turn around to pull a directory or guide off the shelf in order to help someone. I remember realizing how rude my 180-degree turns must seem to patrons: I was literally turning my back on them! Once I realized this, I taught myself to tell them why I was turning. I also have to remind myself to give my full attention to each patron, even if, just before the patron entered the office, I was writing an e-mail message, conducting a catalog search, or reading a memo. Even if I can continue looking at something else while listening to the patron (and that’s debatable), the patron probably does not see it that way. Knowing that even after many years of reference experience these skills still are challenging for me makes it easier to train, coach, and mentor the interns. If they forget to look up and engage with the patrons, I realize that it is not because they are being intentionally rude. They can learn, just as I have learned.

¶12 Excellent reference work demands knowledge, technical skills, and creativity. It also calls for the ability to interact well with people—setting them at ease, finding out what they want to know, teaching them how to use the tools in the library, and so on. It is satisfying to work on those skills myself—and to experience the pleasures of reference interactions that go well. I believe the students we train also experience the challenges and joys of developing those skills.

3. See *infra* Appendix: Tips on Conducting an Effective Reference Interview.

Appendix

Tips on Conducting an Effective Reference Interview

1. **Be approachable.** Be aware that some patrons feel intimidated by the law library. They may be shy about asking questions. Try to put them at their ease. Be aware of body language and nonverbal cues. Look up when patrons approach (don't be buried in a book or the computer screen). Smile. Sit up. Welcome patrons into the office. When you turn to look something up, you may be turning your back on the patron. If so, then it helps to say what you're doing:

- I think that phone number will be in a directory here; let me see.

Sometimes you can approach *them*, rather than waiting for them to come to you. Watch for patrons who look lost or confused. Possible openers:

- Are you finding what you need?
- Can I help you find something?
- Would you like a little help with our catalog?

2. Ask **open-ended questions** to get patrons to tell you what they're looking for. Examples:

- Can you tell me more about what you're looking for?
- Could you be more specific about _____?
- What sort of material are you hoping to find?

The idea is to give patrons a chance to state their own questions and not to have the reference librarian define what the patrons want. However, there are times when you need to **focus the question** to fit within some legal categories, especially jurisdiction:

- Do you think the statute was federal or state?
- Do you know what state that case was in?
- How recent do you think that case is?

3. Once you think you know what the patron is looking for, **verify** by paraphrasing the request and asking a yes-or-no question. Examples:

- You're looking for some books and articles about desegregation; is that right?
- You'd like to find Washington statutes and cases about first degree murder; is that right?

4. It is often a good idea to give patrons a **research framework**. That is, as you recommend that they start with a particular source, tell them why:

- The *Washington Real Property Deskbook* is a multivolume set that covers all sorts of property and land use issues. Why don't you start out with that for an overview? You'll see that it cites statutes and cases—I can show you how to look those up later.

- For a question like yours, it's a good idea to start out looking for recent periodical articles. If you find a good article, the author will give you an overview and cite cases that you can then look up.

5. **Avoid jargon** (or be sensitive to it and explain it). Many patrons are unfamiliar with legal jargon ("code," "session law," "certiorari"). Think of synonyms or thumbnail definitions:

- Let's go out to the *Revised Code of Washington*—it contains the statutes that the legislature has passed, arranged by subject.

Be aware of library jargon, too: terms you are used to ("CD-ROM," "full-text," "monograph," "classified," "URL") can confuse some patrons.

6. Ask **follow-up questions**, such as:

- Are you finding what you need?
- Was that source helpful?

7. **During busy times**, try to help patrons in the order in which they come to the reference office. It is unfortunate, however, if someone has to wait five or ten minutes just to ask where the restroom is or whether we have Kentucky statutes, so if the first patron's question is long and involved, try suggesting:

- Your question is going to take a while. I wonder if I can quickly see what the next person needs. I'll be back with you soon.

Try not to spend so much time with one patron that you are unavailable to other patrons who may need you. If you need to leave the office, don't forget to put the sign up ("The librarian is helping someone else and will be back soon."), and then return quickly by showing the first patron where to start (e.g., RCWA, catalog, LegalTrac) and saying:

- This should get you started. Come on back to the reference office when you have more questions.

If patrons are in the reference office when you come back, thank them for waiting.