

Practicing Reference . . .

Finding Out What They Want to Know*

Mary Whisner**

A skilled reference librarian knows more than simply where and how to look up information. Recognizing the importance of knowing what to look for as well, Ms. Whisner discusses the venerable reference interview and its role in this key aspect of patron services.

¶1 When people ask how business is, I like to say: “Reference is looking up!” If they groan or roll their eyes, I know my pun has hit its mark. But if they look at me uncomprehendingly, I add: “You know, looking up addresses, looking up statistics, looking up cases. . . .” Then they groan or roll their eyes. It is a dumb joke—but it also misses an important part of the job. “Looking up”—and even showing patrons how to look up things for themselves—is only part of reference. Before we get around to looking up anything, we need to figure out what is wanted or what is needed (they are not always the same).

¶2 Someone who has never worked in reference might imagine that this is the easiest part of the process. After all, don’t our users just ask us what they want? Our special skill should be in knowing where and how to look it up, right? Well, one of our special skills is knowing *where and how* to look it up, but another is knowing *what* to look for. And that ability often requires a mix of skill, tact, intuition, and art.

¶3 When I was in library school, my reference professor told a story about a man who asked a librarian for information about China. The librarian overwhelmed him with books about China, the country, only to discover what he really wanted was to figure out how to match a plate he had broken from his wife’s china set. Carl Sagan told about how as a boy he had asked a librarian for a book about stars and had been handed one “filled with pictures of people like Jean Harlow and Clark Gable.”¹ These examples of failed reference interviews seem too bad to be true. Even if we discount these extreme stories, though, the fact remains that people do ask ambiguous questions; and if we reference librarians spring into action too quickly, we can go wildly astray. It really and truly did happen that two patrons

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1. Thomas Mallon, *Billions and Billions*, NEW YORKER, Nov. 22, 1999, at 196, 197 (book review).

in one week asked me for information about incorporation—and one wanted to incorporate a business and the other wanted to learn about the constitutional law doctrine that holds that the Fourteenth Amendment's Due Process Clause makes provisions of the Bill of Rights binding on the states. I congratulated myself for conducting enough of a reference interview to avoid giving the second patron the same book that had been so helpful to the first.

¶14 Sometimes patrons' questions are just opening gambits. When I asked the man who was stocking shelves in the grocery store where the raisins were, he did not need to conduct a reference interview. This particular store has only two small shelves of raisins (big boxes, little boxes, and bags, for both Sunmaid and the store brand), and they were in one easy-to-describe location (halfway down aisle 13 on the right). But the questions our patrons have often are far more complex.

¶15 A fair number of patrons approach the reference desk with this request: "I'd like some help finding a case." This opening, superficially the same, turns out to lead to three different types of research endeavors. So, in the hope of clarifying which type the patron is really interested in, I ask a friendly, open-ended question: "Can you tell me a little more about the case?" The following responses are typical: (1) "It was mentioned in my textbook (or this article) (or this letter I got). See?" (2) "I heard about it from my teacher (or a friend) (or I read a news story about it three years ago)." (3) "Gee, I don't even know whether there *is* a case. I'm just hoping to find a case about this situation."

¶16 Responses like (1) often lead to the case quickly. Even if the patrons did not realize it, they have citation information or at least good solid clues that will enable us to find the case they want. Responses like (2) might lead to the case quickly, but they also might result in an hour of fruitless searching. The patron may remember the wrong name, or maybe the friend or teacher was inaccurate or incomplete. Maybe the case was really in the news ten years ago. Maybe it was only a trial-level case and is not published. Sometimes we find the case, and sometimes we don't.

¶17 I take a response like (3) to mean that the patron really wants information about the subject. I think that patrons initially say they are looking for "a case" because that's what they believe legal research is all about: looking up law means finding "a case." So this is an opportunity to discuss types of legal sources, what might be available on the subject, and what might be useful to the patron. For instance, if the patron says that he needs to find a case about a tenant disputing an eviction, I say that I would be happy to show him sources for finding cases (in our library, these include *West's Washington Digest* and a commercial Web product called *CD Law*). But I also ask him to say a little more about what he wants to know. Perhaps he would like to read a book about landlord-tenant law² or an online

2. *E.g.*, SIDNEY J. STRONG, LANDLORD/TENANT RIGHTS IN WASHINGTON (9th ed. 1999); JANET PORTMAN & MARCIA STEWART, EVERY TENANT'S LEGAL GUIDE (2d ed. 1999).

guide to tenants' rights.³ Even if he still says he wants cases, I suggest secondary sources that will cite cases and place them in context (while also citing the relevant state statutes and possibly mentioning city and county codes).

¶18 Sometimes the patron's first expressed need ("I want to find a case") is not what the patron most needs. The reference interview can be a way of educating the patron about the possibilities. For instance, in the landlord-tenant example, the patron might not be aware of the range of materials available. The patron says he wants a case, but once he sees what some of the other options in the library are, he may change his mind about what he wants.

¶19 These patrons do not always change their minds to fit my assessment of effective research. I remember one man who said he wanted to read the statutes on a general topic—I don't recall what the topic was, but it was a complex federal area, like immigration law. I suggested that he begin with a secondary source. He insisted that he only wanted "the raw law," and so I showed him the statutes. It was appropriate for me to suggest alternative research paths to him, but when he stuck by his original plan, my job was just to get him started in the source he chose. From time to time, we engage in a similar negotiation about the choice of format. Some lay researchers very much want to use the computer and will not be persuaded that some of the print sources we have may help them more and in less time. I mention the other sources and explain what they can do, but when patrons insist on the computer, I show them how to get into a database and start searching—even if I think they are unlikely to find what they need.

¶10 I recently had a frustrating interaction with a patron who was asking about a repealed statute. He had a volume of *Vernon's Texas Statutes and Codes Annotated* in his hand, and he showed me a section that the pocket part indicated had been repealed. It was not in the bound volume. It appeared that the legislature enacted the section in 1992 (after the bound volume was published) and repealed it in 1995 (before our current pocket part). (I'm making up the years, but it doesn't matter for the example. Trust me.) The patron said he wanted to find the old statute. I carefully explained to him how to read the session law citations in the code and described where, on the fifth floor, he would find Texas session laws in microfiche. There, I said, he could read the law as it was passed in 1992. If he wanted, he could also look up the session law that repealed it in 1995. He listened, but I think he was reluctant to go to another floor and to use microfiche. I tried again to explain just how he could find the old statute. At some point, he said that the reason he wanted to see the old statute was so that he could find cases citing it. Whoa! The session law microfiche was not going to give him that. Even though I had been doing my best to tell him how to find what he was asking for, it turned

3. E.g., CONSUMER PROTECTION DIV., ATTORNEY GEN. OF WASH., LANDLORD TENANT LAW, at <http://www.wa.gov/ago/consumer/lt/home.html> (last visited Aug. 2, 2001); NORTHWEST JUSTICE PROJECT, SELF-HELP RESOURCES: HOUSING, at http://www.nwjustice.org/law_center/housing.html (last visited Aug. 2, 2001).

out that what he was asking for (the old statute) was not going to give him what he wanted (cases citing the old statute). If this had been a Washington State law, I could have helped him find the last pocket part from before the repeal, since we keep and bind one set of our own state's annotated code pocket parts. But we don't have the old pocket parts for Texas. Hey, how about KeyCite? I logged him on (we have a subscription for the public) and, after we figured out the format for Texas statutes, he had his list of cases citing the repealed statute. Whew. It wasn't all that hard in the end, but getting there seemed tortuous because of the long detour about how the session laws would give him the text of the statute.

¶11 So far I have been talking about the sort of reference interaction in which patrons ask for help and librarians show them how to do the research. The patrons are making the ultimate decisions about what to read, what leads to follow, and when to stop. In this situation, there is an automatic check if the librarian misunderstands the question: a patron can say, "Nope, that's not what I wanted." It might take a while—as with the man interested in the repealed Texas law—but as long as the person who actually needs an answer is present, we have the hope of clarification.

¶12 When we get a request from a professor, we might find it ambiguous ("incorporation" versus "incorporation") or vague ("I'm looking for a case"), just as when we help the public, but we also face other challenges because the professor is not present as we do the research. I am sure the challenges are parallel in firm libraries, where librarians are doing research for attorneys, and in court libraries, where librarians research for judges and other staff. When the patron is not present, we cannot always ask clarifying questions and the patron cannot explain ambiguities or choose among possible research paths.

¶13 It is becoming less common for professors to come into or telephone the reference office to ask questions. Much more often, they send us their requests via e-mail. We also have one productive faculty member who still handwrites—or scrawls—his questions on yellow paper. (The longer one's tenure in the reference department, the better the odds that one can read his question on the first try.)

¶14 Even when the professor comes to the reference office, we might lack the opportunity for a thorough reference interview. One busy professor, in particular, makes drive-by requests, asking a question and disappearing out the door and onto the elevator before we can catch our breath, let alone ask him meaningful follow-up questions. My colleague Peggy Jarrett says that he reminds her of some of the lawyers in law firms where she worked.

¶15 We also get some second-hand requests. Usually, a faculty secretary is asking on behalf of the professor. Sometimes another layer or two is added: for instance, the professor has a colleague who asked the professor for something that the professor then asked the secretary for and then the secretary calls us; or maybe a research assistant comes in with fragments of a question the professor told him to ask us.

¶16 One way or another, we get the request. Then what? Everyone in my department has what the library job ads refer to as "an excellent commitment to

service.” So our first reaction is generally to hop right on it. We do our best to figure out the question—whether it came in via e-mail, note, drive-by, or whatever—and then try to find the information we think the professor wants.

¶17 Alas, this eagerness sometimes results in some wasted effort. Several months ago, for instance, one professor asked for news stories about a case. The problem was that she misspelled the defendant’s name, so multiple searches did not turn up anything. When the librarian on duty finally sent an e-mail message asking for clarification, the professor offered the city where the crime took place, the approximate year, and the fact that an appeal was on the Ninth Circuit’s docket. Well, if the librarian had known all of that at the start, her searching would have been much more efficient! I had a similar experience with another professor who asked me to find a congressional hearing on a topic (something to do with bioethics) on a certain date. Various searches yielded nothing and I eventually reported my failure to the professor. That surprised her, because her friend so-and-so from another law school had been one of the witnesses. The professor probably did not know that CIS⁴ allowed searching by witness, but I sure was happy to get the witness’s name because it enabled me to find the hearing she wanted.

¶18 After a few incidents like these, we try to remind ourselves to ask for more information, even when the request comes in via e-mail. A couple of months ago, a professor asked for information about a constitutional amendment, specifically including legislative history and secondary materials. My colleague immediately replied: “I’ll begin working on your request this afternoon. Can you tell me if you have a deadline, or a date by which you would like to see any results obtained so far? Also, would you like a bibliography of articles and secondary sources or copies of them?” The professor knew that his request was getting attention—and the librarian was able to find out more about the dimensions of the project.

¶19 Sometimes we make decisions about how far to go. For instance, if a professor just asks for a list of articles about topic X, there are usually choices. I might choose to start with *LegalTrac*. If I come up with a good list, I might stop there and give the printout to the professor, explaining what *LegalTrac* covers. Depending on the topic, I might then invite the professor to ask for a broader search—for instance, going back further in time (the *Index to Legal Periodicals* in print), looking for foreign journal articles (*Index to Foreign Legal Periodicals*), looking for articles from other disciplines (e.g., economics, business, science), or looking for articles from the popular press. Of course, we might sometimes need to narrow the search, too, and then I might suggest ways to do that (e.g., by date or by subtopic).

¶20 Significantly, these patrons are the patrons with whom we can form long-term professional relationships. The undergraduate writing a speech about gays in the Boy Scouts might not ever come back to the law library, but the professors, secretaries, and administrators are here in the law school week in, week out.

4. We were using *Congressional Masterfile* at that time.

Similarly, in a court library, public patrons and attorneys may come and go, but the law clerks are regulars for a year or more—and you can't get much more long-term than the life tenure of federal judges! Law firm libraries have the most stable of patron bases, since they seldom have one-time-only visitors. Working with patrons over many months and years means that each reference interview and research project builds on the ones that came before. On our end, we are able to interpret their questions better. We know that Professor A is writing a law review article on refugees in international law, that Professor B likes to get documents in electronic format, that Professor C loves the *New York Times* and would prefer its coverage of an event to stories from any other paper, and so on.⁵ On the patrons' end, they come to know what we can do and what their options are. Their questions get better—that is, we are more often able to tell from them what the patrons want and when they want it, without asking for clarification.

¶21 While having requests come in via e-mail (or handwritten note) creates the disadvantage of not being able to discuss the question thoroughly at the start, it also has some advantages. Some professors (and judges and lawyers) are very skilled at writing, and their questions are well thought out and clear. (Unfortunately, even people who are skilled at writing might not take the time to be thorough in their reference requests. They are only human.) It takes some pressure off us if we can read the request and react to it without the requestor seeing us. If we need to experiment with different databases or flail around the reference collection, pulling different directories and guides off the shelf, we save face when the patron is not watching.

¶22 When a patron asks a question—even a “simple” question—we have to work to understand what the patron wants to know. Because language is ambiguous and because patrons often ask vague questions, we need to ask questions to find out more. This can be particularly challenging when the question comes in writing, but we often need to do it nonetheless. We need to explain the range of possible sources to the patron—whether it is telling a pro se litigant about self-help books or telling a law professor about *Social Science Citation Index*. This enables the patron to choose the direction and depth of the research and may shape the patron's question. Reference *is* looking up—but it is much more, too.

5. When we build our knowledge of our patrons, our current awareness service improves, too. “Finding out what they want to know” is about more than the reference interview, although that is the focus of this essay.