Virtual Reference Interview Reflection

Inna Gogina

LIBR 210 – Reference and Information Services

San José State University

March 30, 2015
Virtual Reference Interview Reflection

The synchronous virtual reference has been used in libraries since the 1980s, but they came to prominence in the 1990s, “mainly so far in the U.S.A. where some 10% to 15% of public libraries and some 50% of university libraries are now providing e-reference services,” according to Johnson, Reid, and Newton (2011, p. 6). In some cases, particularly in online universities, virtual reference is the only type of library reference services offered. Several services have been developed since, in support for digital reference. The 24/7 Reference, for example, was designed to provide an around the clock reference service, built by a cooperative of participating libraries (Online Computer Library Center).

The traditional reference interview, being the core of face-to-face reference interactions, carried on its important role and functions into the digital environment. “To be effective reference librarians, we must pay close attention to the content of our online or digital dialogues with our patrons,” Passonneau and Coffey assert (2011, p. 277).

This paper presents analysis of two synchronous online chat-based reference interviews. Chat reference, according to the Online Dictionary for Library and Information Science, is a variety of digital reference, which is defined as “Reference services requested and provided over the Internet, usually via e-mail, instant messaging (“chat”), or Web-based submission forms, usually answered by librarians in the reference department of a library, sometimes by the participants in a collaborative reference system serving more than one institution. Synonymous with chat reference, e-reference, online reference, real-time reference, and virtual reference” (Reitz, Western Connecticut State University, & Libraries Unlimited, Inc., 1996).
At the core of the analysis are the chat transcripts—“the artifacts of synchronous virtual reference transactions,” per Passonneau and Coffey (2011, p. 279). The reference interviews were conducted on March 18, 2015 using a synchronous communication technology, Blackboard IM.

The transcript analysis is structured around the evaluation criteria set forth by the Reference and User Services Association in Guidelines for Behavioral Performance of Reference and Information Service Providers (Reference and User Services Association, 2013), for brevity named RUSA Guidelines. The following RUSA Guidelines’ evaluation criteria are used in this paper, in particular as they apply to general and remote reference transactions:

1. Visibility/Approachability
2. Interest
3. Listening/Inquiring
4. Searching
5. Follow-up

There exist several reference evaluation guidelines in the professional literature. In addition to the RUSA Guidelines, IFLA Digital Reference Guidelines were published by the International Federation of Library Associations in 2005 with emphasis in digital reference service, as title suggests. Some libraries designed recommendations of their own, such as the Model Reference Behaviors Checklist, part of the Ohio Reference Excellence (ORE) Manual, published by the OLC (Ohio Library Council).

The author finds RUSA Guidelines particularly helpful because, in addition to remote guidelines, “specific to reference encounters where traditional visual and non-verbal cues do not exist” (Reference and User Services Association, 2013), RUSA also provides general guidelines
that can be applied in any type of reference interaction, including both in person and remote transactions, and in-person recommendations that are specific to face-to-face and video-based reference encounters. Focusing on technology-based reference encounters, RUSA’s remote guidelines apply to phone, virtual, text-based (e-mail, chat, texting, IM), and internet-based voice-only transactions. As the reference interviews analyzed in this paper were conducted via Blackboard IM communication technology, RUSA remote guidelines are directly applicable to this analysis. Finally, RUSA Guidelines are most up to date, in comparison to other sets of guidelines: the current version was revised by the RUSA Reference Committee in 2011, and approved by RUSA Board on May 28, 2013.

The detailed description of the evaluation criteria used in this paper is available in the Appendix B section. The transcripts analyzed in this paper are enclosed in Appendix A.

In addition to the language used in the transcript, the analysis presented in this paper incorporates the ideas of how the librarian-patron interactions might have been improved, as well as the author’s reflection on her experience in the role of the librarian and in the role of the patron.

**Reference Interview Questions**

The patron’s question in the first reference interview was related to professional associations; the second reference interview question was biographical in nature:

Reference Interview 1: Inna – Librarian, [Student 2 - Jane]1 – Patron

Q: I'd like some information about library groups in Colorado.

Reference Interview 2: Jane – Librarian, Inna – Patron

Q: I recently found out that a public library in my neighborhood, North Hollywood Regional

1 Name of the classmate has been replaced with “Jane” to protect the classmate’s privacy.
Library, is named after Amelia Earhart, an American aviation pioneer. I’m looking for a source where I can find information about Amelia Earhart, including her full biography as well as some citations for additional research. Can you direct me to some sources?

Reference Interview Analysis

Visibility/Approachability

“A successful reference transaction requires a high level of visibility. In order to have a successful reference transaction, it is essential that the reference librarian be approachable,” RUSA Guidelines emphasize (Reference and User Services Association, 2013, 1.0). As visual contact is absent in the online environment, self-introduction plays an important part during the virtual reference interview, adding a human touch to the faceless digital encounter. In addition, RUSA Guidelines recommend that in order to be approachable, the librarian must acknowledge patrons by using a friendly greeting to initiate conversation (Reference and User Services Association, 2013, 1.1.3).

At the initial stage of the reference transaction, Inna acknowledged Jane using a friendly greeting “Hi Jane!” and introduced herself by name, work title “reference librarian,” and the institution she was affiliated with, “the King Library”:

[8:33:34 pm] Inna Gogina: Hi Jane! Thank you for contacting the King Library Virtual Reference Desk! My name is Inna, I’m a reference librarian. How can I help you today?

Whereas Jane used welcoming greeting at the beginning of the interview as well, she chose not to disclose her name, work title, and affiliated institution:

[9:05:48 pm] Jane: Good evening, Inna! Thanks for using our IM reference service!

When librarians are unwilling to provide their own names and titles, they fail to establish not only a basis of trust with their users, as Mon and Harris point out in The Death of the Anonymous Librarian, but also the level of expertise that is critical in boosting the users’
confidence during the reference interaction: “For librarians, an unfortunate consequence of being unnamed and unknown is that users cannot easily discern the librarian from any other worker in the library” (2011, p. 357). If users are not certain that they are served by a professional reference provider, they will likely be not at ease at the beginning of the interview process. This, in turn, might elevate the users’ anxiety, which is known to be a critical factor in the information search process. According to Kuhlthau’s Information Search Process model, uncertainty and anxiety are an integral part of the information search process (ISP), particularly in the beginning stages, such as initiation, selection, and exploration (1991, 1993). “By neglecting to address affective aspects, information specialists are overlooking one of the main elements driving information use,” the author argues (1991, p. 370). In order to alleviate the patrons’ uncertainty and anxiety and accommodate library users by facilitating the search for information, Kuhlthau’s Information Search Process model requires intensive interactions with patrons, in the user-centered environment. Providing the name and the area of the reference provider’s specialization to the patron allows the librarian not only to add a human touch to the reference interaction, but to successfully maintain expert-level, intensive interaction with the patron.

Further, RUSA Guidelines for remote services recommend that reference librarians provide jargon-free responses and respond to remote queries in a timely fashion (Reference and User Services Association, 2013, 1.3.2). “The patron should not wait any longer than one minute before the chat provider accepts the question,” Schwartz and Trott argue (2014, p. 10). Based on the time stamps provided in the reference interview transcripts, both Inna and Jane succeeded in providing timely responses to patrons, while using a jargon-free language in their answers. Whereas the time lags between the user questions and the librarian answers intermittently exceeded the one-minute limit, all answers were consistently less than two minutes long.
Interest

In order to ensure a successful reference transaction, both online and offline, the librarian “should embrace each patron’s information need and should be committed to providing the most effective assistance. Librarians who demonstrate a high level of interest in the inquiries of patrons will generate a higher level of satisfaction among users,” RUSA Guidelines advise (Reference and User Services Association, 2013, 2.0). In remote environment, the librarian meets sufficient interest level by acknowledging user questions in a timely manner; maintaining regular online contact with the patron to convey interest and provide assurance that the query is still viable and a response is forthcoming; and signaling an understanding of the patron’s need (Reference and User Services Association, 2013, 2.3).

Both Inna and Jane were successful in acknowledging the patrons’ information needs and maintaining a high degree of objective, nonjudgmental interest in the reference transactions. During the greeting phase, they both expressed their interest and readiness to help their patrons:

[8:33:34 pm] Inna Gogina: […] How can I help you today?
[8:35:00 pm] Inna Gogina: I will be happy to help you with your research.

[9:05:48 pm] Jane: […] I can definitely help you with that. Before I start searching, I'm going to ask you a few questions to make sure I find exactly what you need.

When, during the search phase, providing an answer required extra time, both Jane and Inna maintained regular contact with the patron, providing assurance that the query was still viable and a response was forthcoming—each using a distinct communication technique. While Jane used ellipses as a nonverbal compensator to indicate her online presence while searching:

[9:15:15 pm] Jane: ...
[9:16:25 pm] Jane: ...
[9:18:11 pm] Jane: ...,

Inna used word contact phrases, sending prepared written prompts:
Inna Gogina: Ok, great! I will start searching now. I will keep checking in with you, while I search…
Inna Gogina: It will be a couple of more minutes…
Inna Gogina: still searching...

Language of communication in the online reference environment has been subject of discourse in the professional literature since the inception of the digital library services. For example, in order to compensate for the lack of visual cues, Nebraska Library Association recommends, in addition to word contact, using: repeated punctuation for emphasis; ellipses to indicate more to come; spell out nonverbal behaviors (ha ha, oh, hmmm) rather than using emoticons; and trying to avoid ALL CAPS (Hillyer & Nebraska Library Association, 2009).

Both Jane and Inna did well with signaling an understanding of the patron’s need, using words of encouragement during the question negotiation phase, as well as the search phase, such as “Certainly,” “That sounds great,” “OK, great!”, “Perfect,” etc.

**Listening/Inquiring**

Effective listening and questioning skills are necessary for a successful reference transaction. “The librarian should effectively identify the patron's information needs in a manner that puts the patron at ease,” RUSA Guidelines maintain (Reference and User Services Association, 2013, 3.0). In order to ensure effective listening and inquiry, RUSA recommends that the librarian communicates in a receptive, cordial, and supportive manner; allows the patrons to fully state their information need in their own words before responding; identifies the goals and objectives of the patrons’ research; rephrases the question and asks for confirmation to ensure accurate understanding; uses open-ended questions to encourage the patron to expand on the request; uses closed and/or clarifying questions to refine the search query; maintains objectivity; and respects the patrons’ privacy (Reference and User Services Association, 2013, 3.1).
Both Inna and Jane were consistent in maintaining receptive, cordial, and supportive communication with the online reference chat recipients. Inna thanked the patron for using the service, both at the beginning and end of the interview:

[8:33:34 pm] Inna Gogina: Hi Jane! Thank you for contacting the King Library Virtual Reference Desk!
[8:59:15 pm] Inna Gogina: Thank you, Jane, for using our service! Have a great day!

Jane thanked her patron only at the beginning of the interaction: “[9:05:48 pm] Thanks for using our IM reference service!”; and expressed her own satisfaction while concluding the interaction: “[9:43:42 pm] I’m glad I could help,” demonstrating the positive outlook and enthusiasm about the interaction outcome.

According to RUSA guideline 3.1.3, Inna and Jane allowed the patrons to fully state their information need in their own words before responding to their queries. In addition, whereas no specific goal-related questions were present in either of the interviews, Inna was able to get the answer clarifying the purpose of patron’s research—networking with professional association members—by posing the open-ended, neutral question at the beginning of the interaction: “What kind of information are you looking for?”

[8:35:00 pm] Inna Gogina: I will be happy to help you with your research. Let me just ask you a few questions to get a better understanding of your question. What kind of information are you looking for, regarding the library groups in Colorado?

[8:35:32 pm] Jane: Are there any groups that I could look into to meet other librarians or students that I could network with?

A neutral questioning strategy, designed in the 1980s, is a valuable tool in improving the information need identification as it helps librarians understand what patrons really want. Neutral questions are a subset of open-ended questions that “guide the conversation along dimensions that are relevant to all information-seeking situations. The neutral questioning strategy directs the librarian to learn from the user the nature of the underlying situation, the gaps
faced, and the expected uses,” according to Dervin and Dewdney (1986, pp. 508-509). In this instance, the neutral question helped Inna assess the use of the information her patron was seeking.

Jane, on the other hand, did not clarify the purpose of her patron’s search, failing to meet the RUSA guideline 3.1.4, aimed at specifying the goals and objectives of the patron’s research. Instead, she delved into clarifying the types of sources early on into the interview, posing the closed question: [9:05:48 pm] “Would you like articles, books, websites, or other resources?” Had Jane posed neutral, open-ended questions, such as “Tell me what you’re ultimately trying to do, so I head in the right direction” or “Tell me a bit about how you plan to use this information,” that might have encouraged the patron to expand on her topic of interest, which in turn might have added more value to the original information need (Reference and User Services Association, 2013, 3.1.7).

Furthermore, continuing using closed questions early during the interview, Jane lost sight of the full scope of her patron’s information need—namely, additional sources about Amelia Earhart—even though the patron clarified, after the initial information exchange, that in addition to Earhart’s biography, she would also like to find books and articles written about the female pilot:

[9:07:38 pm] Inna Gogina: I'd like to find her biography and also maybe some books or articles that have been written about her, or by her. If there are other resources available, I'd like to check them out too.

Here, Jane again ignored the “other resources” part of the information need, and proceeded with focus on the biography, asking another closed question:

[9:08:09 pm] Jane: Would you like the biography to be short, such as you would find on a webpage, or an entire book?
Both Inna and Jane followed the RUSA guideline 3.1.5, concerned with rephrasing the question and asking confirmation to ensure accurate understanding of the information need. Rephrasing the question is particularly noteworthy here, as according to the results of the study of adherence to RUSA Guidelines as reported by Shachaf and Horowitz, only 9.5% respondents used this strategy (2008, p. 132).

[8:41:00 pm] Inna Gogina: Perfect. Before I start though, let me just make sure I have your question right. You are looking for library groups, specifically those in Colorado, and you’d like to see if they have a website where you could find additional information. Is there anything you’d like to correct or add?

[9:12:06 pm] Jane: Okay - so you’re looking for a biography and some supplemental information on Amelia Earhart, the pilot. I’ll start by looking for a shorter biography so that you can get a good overview of her life without reading a whole book. Does this sound like what you’re looking for?

While Inna was able to rephrase patron’s question successfully, it looks like Jane, perhaps without realizing how it might affect the entire reference transaction, oversimplified the patron’s information need. Whereas in the first part of rephrasing Jane did seemingly well “so you're looking for a biography and some supplemental information on Amelia Earhart, the pilot,” she then went on to suggest: “I'll start by looking for a shorter biography so that you can get a good overview of her life without reading a whole book.” At this point in the interview, Jane’s focus switched entirely to the biographical part of the information need. Consequently, the patron was hesitant to revert to her original query and continue insisting that in addition to biography, she would also like to get information about additional literature for her research. Instead, the patron complied, saying: “[9:12:25 pm] Yes, that sounds great!”

**Searching**

In the course of the reference transaction, searching is the stage “in which behavior and accuracy intersect,” RUSA Guidelines state (Reference and User Services Association, 2013,
4.0). “Proper searching behavior during the virtual reference interview is important to the patron’s perception of success in his or her quest to obtain the needed information from the librarian,” Schwartz and Trott point out (2014, p. 10). “Without an effective search strategy, not only is the desired information unlikely to be found, but the patron may become discouraged as well.”

Moreover, the traditional reference interview process, when “librarians too often answer questions by responding at their own level of expertise” thereby excluding library patrons from “the many judgements and decisions the librarian makes in determining what is relevant and useful,” is “very unhealthy for the learner, who needs to participate in every decision in order to learn to be independent,” Elmborg argues (2002, p. 462). This is why, in addition to ensuring the credibility of sources used, and accuracy of the information provided to the patron, reference librarians have been tasked with teaching information literacy skills and explaining their search strategies to the patrons. Both Jane and Inna met the information literacy demand by providing the detailed search strategy to the patrons, during this reference interview phase.

In addition, both Inna and Jane did well in finding out what the patron had already tried, according to the RUSA guideline 4.1.1:

[8:38:12 pm] Inna Gogina: That sounds great. Have you already done any preliminary research, and if so, what have you already found?

[9:09:13 pm] Jane: Okay, great! Have you done any research yourself yet? I don't want to give you information you've already found.

Following the RUSA guidelines 4.1.2 and 4.1.8, Inna identified an appropriate source that was most likely to contain information relevant to the patron’s query for library organizations in Colorado, the electronic version of Associations Unlimited database, and provided full citation of the resource. Finally, she offered to guide, and guided, the patron
through the online database, to make sure she not only found the information she needed at that moment, but also that she could learn how to answer similar questions on her own in the future.

At first glance, Jane provided a proper resource as well: a link to Amelia Earhart’s biography authored by Tom Beer, which was published in the November 2003 Biography issue. Jane explained that she retrieved this record searching the Biography Reference Bank database, part of the King Library ([9:21:01 pm] - [9:21:31 pm]). When the patron wanted to know how to get to the database from the King Library homepage, Jane complied and explained how to accomplish that ([9:22:59 pm] - [9:28:51 pm]).

The problem with the source of Jane’s choice was that, whereas it did contain Amelia Earhart’s biography, it fell short of providing additional sources for the patron’s research. The author feels that had Jane used an online database entitled Gale Biography in Context, she would have not only retrieved Amelia Earhart’s biographical information, but a list of additional resources that the patron was originally asking about, as well. The additional resources featured in Amelia Earhart’s Gale Biography in Context record include links to articles about Amelia Earhart published in the academic journals, magazines, and newspapers, as well as selected websites. Coincidentally, Amelia Earhart’s profile is featured on the database’s landing page, and therefore is available without additional search, as of this writing.

This demonstrates again, the importance of assessing the patron’s information need completely and accurately at the very beginning of the reference interview, in order to identify an appropriate information source to utilize during the search phase.

Jane was able to partially remedy the situation—it must be noted—at a later point during the interview, by referring the patron to the New York Times Historical database, for additional research.
Follow-up

“Supplying information is not the end of the reference transaction. The librarian is responsible for determining if the patron is satisfied with the results of the search, and referring the patron to other sources including those not available through the local library,” RUSA Guidelines indicate (Reference and User Services Association, 2013, 5.0).

Both Inna and Jane succeeded in adhering to the RUSA guidelines during the follow-up phase. They ensured that their questions had been completely answered (Reference and User Services Association, 2013, 5.1.1) by assessing the patrons’ answers to their suggestion of searching for additional information:

[8:56:50 pm] Inna Gogina: Can I help you any further with this source, or would you like to take a look at any additional sources?
[8:57:05 pm] Jane: No, I think I'll browse their website when I have some more time later

[9:37:19 pm] Jane: If you have a little more time, I can track down some more supplemental information for you
[9:38:03 pm] Inna Gogina: I think I am good for now. I will start with the link to the bio you found, and go from there. Thanks!

Finally, both librarians encouraged their patrons to return if they had further questions (Reference and User Services Association, 2013, 5.1.2), by making the following statements:

[8:58:18 pm] Inna Gogina: […] If you have any further questions, please don’t hesitate to contact us again! You can find several support features in the top navigation menu of the King Library website, under Research Support, such as Ask A Librarian, Subject Librarians, and others.

[9:41:33 pm] Jane: […] If you have any more questions, don't hesitate to contact us. Clicking the "Ask a Librarian" link on our home page will show you some information on getting in touch at our physical desk, on the phone, or through email. We're also part of a collaborative IM program, so that even when it's 3 in the morning, a librarian can help you with your questions.

The use of this strategy is particularly remarkable in contrast to the results of the study of adherence to RUSA Guidelines as reported by Shachaf and Horowitz: “Lower levels of
adherence to RUSA guidelines are observed in […] making follow-up remarks (28%)” (2008, p. 131).

**Conclusion**

In summary, this analysis demonstrates that whereas Inna and Jane equally succeeded during the Interest and Follow-up phases of the reference interview process, the author believes that Jane could have done a better job adhering to the Visibility/Approachability, Listening/Inquiring, and Searching guidelines as outlined by RUSA. She could have (1) added a human touch to the interview by providing her name, work title, and the name of the affiliated institution at the beginning of the interview (Visibility/Approachability); (2) assessed the patron’s information need with greater accuracy by posing neutral questions early on during the interview process (Listening/Inquiring); and (3) provided a more suitable information source that was most likely to contain information relevant to the full scope of the patron’s query (Searching).

In the user-centered information environment of today, library patrons expect to not only be able to retrieve accurate information, but also feel empowered in the process. “Evolving technology in the digital environment invites an increased emphasis on empowering the library user and on optimizing reference library service as a whole,” Buckland explains (2008, p. 84). The RUSA guidelines, as well as studies evaluating the use of these guidelines in practice, help accomplish user satisfaction and avoid the missed chances in meeting the user needs. “Of all the service challenge categories, the “missed chance” code has the starkest potential to adversely affect users’ desire to request reference assistance. The missed chance represents the antithesis of synchronous learning,” Passonneau and Coffey point out (2011, p. 291).
While thinking about the future of reference service, librarians must continuously assess the information and learning needs of their users. In addition to the guidelines and quality standards set by professional associations such as RUSA, Elmborg’s emphasis on the need of information literacy instruction in the reference service of the future is what every librarian should keep in mind while striving for success in reference service: “If reference is to remain a significant library service, as I believe it absolutely must, reference librarians need to continue to work on ways to become full partners in the educational enterprise. Librarians need to become coaches and collaborators at the reference desk, people willing to teach students to “talk the talk” of research” (2002, p. 463).
References


Appendix A

Digital Reference Interview Transcripts: Jane and Inna

Wednesday, March 18, 2015

Reference Interview 1: Inna – Librarian, Jane – Patron

[8:33:34 pm] Inna Gogina: Hi Jane! Thank you for contacting the King Library Virtual Reference Desk! My name is Inna, I’m a reference librarian. How can I help you today?

[8:34:22 pm] Jane: I’d like some information about library groups in Colorado.

[8:35:00 pm] Inna Gogina: I will be happy to help you with your research. Let me just ask you a few questions to get a better understanding of your question. What kind of information are you looking for, regarding the library groups in Colorado?

[8:35:32 pm] Jane: Are there any groups that I could look into to meet other librarians or students that I could network with?

[8:36:50 pm] Inna Gogina: Certainly, I could look that up for you! And how much information do you need?

[8:37:30 pm] Jane: I guess I would need to know the name of possible groups and how I could join them

[8:38:12 pm] Inna Gogina: That sounds great. Have you already done any preliminary research, and if so, what have you already found?

[8:38:30 pm] Jane: No, I haven't really looked into it yet.

[8:38:52 pm] Inna Gogina: Okay. And lastly, what types of sources are you looking for – books, articles, websites, or anything else?

[8:39:05 pm] Jane: Probably websites

[8:39:20 pm] Inna Gogina: Ok, great! I’m going to search in a couple of different sources now. I will be away for a few minutes and if it takes longer, I will check back in with you. Does this sound good?

[8:39:30 pm] Jane: Yes, thank you!

[8:41:00 pm] Inna Gogina: Perfect. Before I start though, let me just make sure I have your question right. You are looking for library groups, specifically those in Colorado, and you’d like to see if they have a website where you could find additional information. Is there anything you’d like to correct or add?
[8:41:18 pm] Jane: No, I think that covers it!

[8:41:37 pm] Inna Gogina: Ok, great! I will start searching now. I will keep checking in with you, while I search…

[8:43:41 pm] Inna Gogina: It will be a couple of more minutes…

[8:45:30 pm] Inna Gogina: still searching...

[8:47:25 pm] Inna Gogina: Okay, I think I was able to find a very helpful source: the electronic version of Associations Unlimited database:

Gale Group. Associations unlimited. Retrieved from http://galenet.galegroup.com.libaccess.sjlibrary.org/servlet/AU?locID=csusj It contains 152,000 detailed listings for organizations all over the world. I'll send you the URL, to get you started, and walk you through the search. Would you like that?


[8:48:42 pm] Inna Gogina: Please go to this URL: http://galenet.galegroup.com.libaccess.sjlibrary.org/servlet/AU?locID=csusj and log in using your SJSU credentials. Tell me when you are on the Associations Unlimited home page and are ready to continue.

[8:49:10 pm] Jane: Okay, I'm ready

[8:49:42 pm] Inna Gogina: Perfect! Now click on Custom Search, it is fourth from top on the page...

[8:50:00 pm] Jane: Found it

[8:51:41 pm] Inna Gogina: Ok, great! Now type "libraries" in the Association Name field and "CO" in the State/Province field and Click "Search."

[8:52:18 pm] Jane: Okay, I got 5 results

[8:52:24 pm] Jane: Wow, I didn't even know Jewish libraries were a thing!

[8:52:52 pm] Inna Gogina: That's great! Is there any organizationo on the list that you'd like to explore further now?

[8:53:17 pm] Jane: Yes, I think the Colorado Association of Libraries will be helpful for me!

[8:54:28 pm] Inna Gogina: Excellent! Click on the title link, Colorado Association of Libraries, and you will be redirected to the page that displays more details about the organization.

[8:55:36 pm] Inna Gogina: Here is their main contact info: 12011 Tejon St., Ste. 700 Westminster, CO 80234 USA
Primary Contact: Rochelle Logan, Contact

[8:56:12 pm] Jane: Okay, cool, I'll check out their website! Thank you very much!

[8:56:26 pm] Inna Gogina: Yes, and this is their website: http://www.cal-webs.org/

[8:56:50 pm] Inna Gogina: Can I help you any further with this source, or would you like to take a look at any additional sources?

[8:57:05 pm] Jane: No, I think I'll browse their website when I have some more time later

[8:57:14 pm] Inna Gogina: Great! In case you’d like to use this database in the future, here is a link to the Associations Unlimited Navigation Guide: http://www.gale.cengage.com/pdf/navguide/assun_nvg.pdf

[8:57:58 pm] Jane: Oh, okay, thank you!

[8:58:18 pm] Inna Gogina: YOu are very welcome, Jane! If you have any further questions, please don’t hesitate to contact us again! You can find several support features in the top navigation menu of the King Library website, under Research Support, such as Ask A Librarian, Subject Librarians, and others.

[8:58:57 pm] Jane: Thank you Inna!

[8:59:15 pm] Inna Gogina: Thank you, Jane, for using our service! Have a great day!

[8:59:24 pm] Jane: You too!

[8:59:30 pm] Inna Gogina: Goodbye!

Reference Interview 2: Jane – Librarian, Inna – Patron

[9:03:50 pm] Inna Gogina: Hello, I am Inna. I recently found out that a public library in my neighborhood, North Hollywood Regional Library, is named after Amelia Earhart, an American aviation pioneer. I’m looking for a source where I can find information about Amelia Earhart, including her full biography as well as some citations for additional research. Can you direct me to some sources?
[9:05:48 pm] Jane: Good evening, Inna! Thanks for using our IM reference service! I can definitely help you with that. Before I start searching, I'm going to ask you a few questions to make sure I find exactly what you need. Would you like articles, books, websites, or other resources about Amelia Earhart?

[9:07:38 pm] Inna Gogina: I'd like to find her biography and also maybe some books or articles that have been written about her, or by her. If there are other resources available, I'd like to check them out too.

[9:08:09 pm] Jane: Would you like the biography to be short, such as you would find on a webpage, or an entire book?

[9:08:32 pm] Inna Gogina: A webpage would be a great place to start!

[9:09:13 pm] Jane: Okay, great! Have you done any research yourself yet? I don't want to give you information you've already found.

[9:10:18 pm] Inna Gogina: I googled her name but there were so many results that I got confused. I'd like some guidance in finding a good source.

[9:12:06 pm] Jane: Okay - so you're looking for a biography and some supplemental information on Amelia Earhart, the pilot. I'll start by looking for a shorter biography so that you can get a good overview of her life without reading a whole book. Does this sound like what you're looking for?

[9:12:25 pm] Inna Gogina: Yes, that sounds great!

[9:13:38 pm] Jane: Great! Now, this may take a bit while I search for sources. I'll send you messages here every once in a while, just to let you know I'm still here and searching!

[9:13:49 pm] Inna Gogina: Okay, thanks!

[9:15:15 pm] Jane: ...
[9:16:25 pm] Jane: ...
[9:18:11 pm] Jane: ...

[9:19:48 pm] Jane: Okay, I've found a short biography. Would you like me to send you the link, or explain how I reached it?

[9:20:46 pm] Inna Gogina: I would like the link, and it would be great if I knew how to reach it next time I look for it, as well, please.
[9:21:01 pm] Jane: Okay - here's the link first:
http://web.b.ebscohost.com.libaccess.sjlibrary.org/ehost/detail/detail?sid=f91a8fbc-418a-4b39-9dda-29d18c460be3%40sessionmgr110&vid=0&hid=125&bdata=JnNpdGU9ZWhvc3QtcGltZQ%3d%3d#db=brb&AN=503888397
Jane: One of the databases that King Library subscribes to is called Biography Reference Bank. This is the link to the main search page: http://web.b.ebscohost.com.libaccess.sjlibrary.org/ehost/search/advanced?sid=454a758f-b00a-4759-ac16-37581390f6f8%40sessionmgr112&vid=0&hid=125

Inna Gogina: I got it. It looks great!

Jane: There's a lot going on here - you could search using gender, occupation, and a lot of other filters. But for your search, since we knew the name of the individual you were curious about, the search was very simple.

Jane: I just typed Amelia Earhart into the first search box.

Inna Gogina: Or, so you look for the database first, is that right?

Jane: Oh, yes, I'll tell you how to get to that page from our main website.

Inna Gogina: Great, I appreciate it!

Jane: At library.sjsu.edu, do you see in the center column a dropdown list under titled "subject guides"?

Inna Gogina: Yes, I do

Jane: Clicking on "B-C" will bring up all the databases that start with those letters. So if you do that, you'll see Biography Reference Bank along with a couple of other biographical sources.

Inna Gogina: Oh yes, I see it now. Thank you!
Jane: If it seems like there are a few similar databases that could help you answer your question and you want to narrow it down, you can click on the question mark next to any database name and it will tell you a bit about that source and what it includes.

Inna Gogina: That's great. I will explore those too!

Jane: Okay, so now that we've gotten to a potentially helpful database, we'll figure out what to search on. If you learned about someone in class, say, a female atmospheric chemist who worked in the 1980s, but you didn't remember her name, you could use some of the advanced search features here.

Inna Gogina: Absolutely! This is very helpful, thank you!

Jane: Since you already know the individual's name that you're interested in, our search can be quite simple. If you just type amelia earhart into the upper search box, you should get 220 results.

Inna Gogina: Great. I will check them out.

Jane: To find the particular link that I sent you, I narrowed down the search using the tools on the left. You specifically wanted a biography, and the database lets you limit your results to a certain source type. I checked the box for Biographies. That narrowed it to 22 results, which is much easier to look through than 220!

Inna Gogina: Oh, ok. I understand now. Thank you for explaining this!

Jane: No problem!

Inna Gogina: Oh, ok. I understand now. Thank you for explaining this!

Jane: If you have a little more time, I can track down some more supplemental information for you.

Inna Gogina: I think I am good for now. I will start with the link to the bio you found, and go from there. Thanks!

Jane: Great! That database can give you magazine articles or articles from academic journals - something else that may interest you is New York Times, Historical database we subscribe to. That could have some interesting news articles from her lifetime.

Inna Gogina: Oh, yes, that's a great idea! I will check it out.
[9:41:33 pm] Jane: Have fun researching! If you have any more questions, don't hesitate to contact us. Clicking the "Ask a Librarian" link on our home page will show you some information on getting in touch at our physical desk, on the phone, or through email. We're also part of a collaborative IM program, so that even when it's 3 in the morning, a librarian can help you with your questions.

[9:42:55 pm] Inna Gogina: Oh wow! I didn't know your service is available 24/7! Definitely good to know, especially during the midterms or finals!

[9:43:42 pm] Jane: For sure! Have a good night, Inna! I'm glad I could help you with your question!

[9:44:01 pm] Inna Gogina: Thank you so much, Jane! You too have a good night!
Appendix B

Reference Interview Evaluation Criteria

The following RUSA Guidelines’ evaluation criteria are used in this paper:

1. **Visibility/Approachability**

The librarian:

1.1 **General**

1.1.1 Is to be found in a highly visible physical or virtual location (the library, outreach locations, or the library website). Proper signage or notification that indicates the location, hours, and availability of in-person and remote assistance is available.

1.1.2 Is poised and ready to engage patrons. The librarian is aware of the need to stop all other activities when a patron approaches and focus attention on the patron’s needs.

1.1.3 Acknowledges patrons by using a friendly greeting to initiate conversation.

1.1.4 Acknowledges others waiting for service.

1.1.5 Employs a system of question triage to identify questions and service priorities.

1.3 **Remote**

1.3.1 Provides prominent, jargon-free pointers to all forms of reference services via the library’s web or mobile site.

1.3.2 Responds in a timely fashion to remote queries.

2. **Interest**

2.1 **General**

2.1.1 Focuses complete attention on the patron and his/her information need.

2.3 **Remote**

2.3.1 Acknowledges user questions in a timely manner.

2.3.2 Maintains regular online or voice contact with the patron to convey interest and provide assurance that the query is still viable and a response is forthcoming.

2.3.3 Signals an understanding of the patron’s need.

3. **Listening/Inquiring**

3.1 **General**

3.1.1 Communicates in a receptive, cordial, and supportive manner.

3.1.2 Uses a tone of voice and/or written language appropriate to the patron and the nature of the transaction.

3.1.3 Allows the patron to fully state his/her information need in his/her own words before responding.
3.1.4 Identifies the goals or objectives of the patron’s research, when appropriate.
3.1.5 Rephrases the question or request and asks for confirmation to ensure accurate understanding.
3.1.6 Seeks to clarify confusing terminology and avoids jargon.
3.1.7 Uses open-ended questions to encourage the patron to expand on the request or present additional information.
3.1.8 Uses closed and/or clarifying questions to refine the search query.
3.1.9 Maintains objectivity; does not interject value judgments about the subject matter or the nature of the question into the transaction.
3.1.10 Respects patron privacy; maintains confidentiality after the transaction.

3.2 Remote
3.2.1 Uses current technology during the reference interview to gather as much information as needed to serve the patron’s need without compromising patron privacy.

4. Searching

4.1 General
4.1.1 Finds out what the patron has already tried, and encourages the patron to contribute his/her ideas.
4.1.2 Constructs a competent and complete search strategy. The librarian:
   • Selects search terms that are most relevant to the information desired.
   • Verifies spelling and other possible factual errors in the original query.
   • Identifies appropriate sources that are most likely to contain information relevant to the patron’s query.
4.1.3 Explains the search strategy to the patron.
4.1.4 Works with the patron to evaluate results, revise search terms, and identify other sources to try if the search is unsuccessful.
4.1.5 Works with the patron to narrow or broaden the topic when too little or too much information is identified.
4.1.6 Attempts to conduct the search within the patron’s allotted time frame.
4.1.7 Explains how to use sources when appropriate.
4.1.8 Offers pointers, detailed search paths, and names of resources used to find the answer, so that patron can learn to answer similar questions on his/her own, when appropriate.
4.1.9 Recognizes when to refer patrons for more help. This might mean a referral to a subject librarian, specialized library, or community resource.
4.1.10 Asks the patrons if additional information is needed after results are found.

4.3 Remote
4.3.1 Uses appropriate technology to help guide the patron through information resources, when possible.
5. Follow-up

5.1 General
5.1.1 Asks the patron if his/her questions have been completely answered.
5.1.2 Encourages the patron to return if he/she has 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.”
5.1.3 Consults with other librarians or experts in the field when additional subject expertise is needed.
5.1.4 Makes the patron aware of other available reference pathways (e-mail, chat, etc.).
5.1.5 Makes arrangements with the patron, when appropriate, to set up an individual research appointment to continue researching the question.
5.1.6 Refers the patron to other sources or institutions if the query has not been answered to the satisfaction of the patron.
5.1.7 Takes care not to end the reference interview prematurely.

5.3 Remote
5.3.1 Encourages the patron to contact the library again if he/she has further questions by making a statement such as “If you need additional information, please contact us again and we’ll try something else.”