Unobtrusive Evaluation of Reference Interaction

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It was around 9:30 in the morning, and there were three reference librarians in the reference desk. One was working with a patron, and the other two were working with another computer, busy with setting up the machine. There were only two users before me. One was in the reference desk, and the other was lining up in front of me. The reference librarian soon finished reference service with the first user and was working with the other user, when one of the two librarians who had been working with the computer left the reference desk and the other one was dealing with some leftover setup. By glancing over the reference desk and saw me standing there waiting, she said to me, “just give me one second, please.”

“Ok,” I said, while I was thinking, I really would not mind if it takes her longer, because the other librarian next to her, who had been working with the users, gave very pleasing smile and seemed to be more approachable. He also looked older and more sophisticated, and I hoped secretly that he could take me. (I realized afterwards that this was not the right way to think, because I might have held a bias towards age, and it was not fair to the younger librarians. When I finished this program and started to work, I would quite possibly work as a relatively “young” librarian as well, and I would feel very irritated if someone has doubts on my professionality just because I am younger than other librarians.) The other reason for me preferring the other librarian might be that the librarian who greeted me was not smiling at all. I did not mean that she was mean or unwilling to help. Actually, her voice was gentle and looked willing to help, but her face just had no expression. I could not help guessing that she might have something on her mind and today was just not a good day for her.

It only took the librarian several seconds to arrange everything and she was ready
to help. She said to me, “Ok. How can I help you?” She was still nice, but not smiling. “I’m looking for a book that tells me how to do the tax return...” She looked a little serious and avoided my eyes when she was listening, and I was wondering if there was some problem with my English and did I make myself clear? I went on saying, “...and I remember my friend mentioned a book called ‘tax’, ‘dummy’ or something.” She got what I meant and responded quickly. She was about to type something into the computer and said, “Ok, let me see...” I was curious about the process of her searching for the right answer, so I asked, “Can you also show me how you do it?” “Yeah. Of course.” She gladly turned the screen so I could see it. This is really helpful, because I not only wanted to have the answer for this particular question, but also the searching method for later search when I could do it by myself. “First go to the library homepage, and search here...” As she speaking, she did not notice that the cursor was not in the searching box, and as she was typing the page somehow turned to “page not found.” At the same time, by looking at the screen I saw the problem and tried to tell her by saying, “Oh, it is not...,,” only she realized it at the same time. It is a mistake that happens everyday for everyone, but when it happens in the reference desk I cannot help being critical about it. Reference interviews with users in the reference desk usually take only a couple of minutes or sometimes even less. What librarians do during this short period of time would largely impress the patrons and decide the patrons’ opinion on them. One careless mistake or mistype has very negative impression on the user, and in this case I was given the impression that the librarian was not efficient and professional enough and was also a little concerned that it wasted my time.

She quickly returned to the library homepage, and said, “Ok, in here, let’s try ‘taxes for dummies.’” One result came out immediately. “Right here. This is the ‘Taxes for Canadians for Dummies.’ This book is a little old...” She looked towards me and paused for a moment. The word “old” made me hesitated a little bit, and some thoughts just flashed in my head, how “old” is the book? If the book was “old,”
should I still take it? Should I ask the librarian for another tax return related book which is relatively new? The look also made me feel that she might be thinking this book (I found out it later that it was published in 2001) might be a little too old for me to DIY tax return and whether she should suggest me a newer one. She did not ask me further questions, however, and went on saying, “…and it’s in the law library. I’m gonna write down the call number for the book, then you could go to the law building and grab it, ok?”

“Ok… Thank you,” I said. It occurred to me later that I might ask for a relatively new book on the same subject which would serve my objective better, but at that moment the idea just flashed in my head and I never uttered it.

Then the librarian finished recording the call number on a piece of notepaper, and handed to me, “Here you are. The law building is on that side of the Rutherford.” She was pointing to a direction. Seeing that I was at a loss, she further explained, “It’s this way along the HUB to the end, and the law building is on the left side.” When she was pointing the direction, I was trying figuring out the location of the HUB and the place I was. When she finished describing it, I thought I might have got a vague idea of where the library building was, and said, “Ok, thanks a lot!”

“You’re welcome. You know where it is now?” she asked.

“Um… yeah, I think I get it. I can always ask the direction, anyway,” I replied.

“I can get you a campus map here.” She went to the back shelf and brought me a map. “We are now here, in No.6.” She pointed in the map and said, “The law library is here in No.4.” This is very helpful. By reading the map, I got a clear picture of where the law building was located and which way I should take.

“Thank you.”

“No problem.”

After leaving the reference desk, I took a look at the call number she recorded for me, and found I had the problem of identifying one of the numbers to be “9” or “a,” and it was really frustrating. Suppose the patrons go to the stacks with the call numbers and just could not find the book, it is quite likely that they would blame it on the librarians who have provided the reference service, and think the librarians
have failed to do their jobs. Although it was not a problem for me in this case, because all the letters in this call number were capital letters, it would be very important for librarians to produce correct recording of the call number that would not cause any confusion.

The RUSA (Reference and User Services Association) of the American Library Association Ad Hoc Committee on Behavioral Guidelines for Reference and Information Services published “Guidelines for Behavioral Performance of Reference and Information Service Professionals” in 1996 to provide a guideline for reference services in the library environment, and revised it as “Guidelines for Behavioral Performance of Reference and Information Service Providers” in 2004, to cope with the development of the multimedia tools and technology for the communication and interaction between librarian and patron in reference service. Cassell and Hiremath (2006) valued this guideline by writing that “these performance guidelines may form the backbone of a library’s staff evaluation instruments, whether the instrument is a simple self-evaluation checklist, a peer-evaluation tool, or a formal evaluation system influencing earning potential.” (p.25)

The guidelines provide five categories to cover all the aspects in reference service:

1. Approachability

Approachability is important for the reference service in that it starts the very first contact between librarians and users. The guideline states “approachability behaviors, such as the initial verbal and non-verbal responses of the librarian, will set the tone for the entire communication process, and will influence the depth and level of interaction between the staff and the patrons.” (RUSA, 2004) Katz also emphasized the importance of approachability by writing “One circumstance, which is neither special nor unique, but all-important in the reference interview, is the matter of approachability. The librarian should appear willing to assistance.” (Katz, 2002, p.134) Schwartz and Eakin (1986) included the factor of approachability into Reference Service Standards that reference librarians convey
an attitude and manner that encourages users to seek assistance.

In general cases, the reference librarians shall “roves through the reference area offering assistance whenever possible” and “acknowledge others waiting for service”. (RUSA, 2004) At the very beginning of the unobtrusive evaluation process, the reference librarian was busy dealing with some computer set-up, but she roved the desk area at the same time to see if there was someone waiting for help. When noticed that I was waiting in the line, she acknowledged my existence by kindly asked me to “give her one second.” Although I was notified to wait a little longer, which is not so pleasant in ordinary cases, I felt it was understandable. I found the initial direct and personal contact between librarians and patrons very important. Being greeted appropriately, patrons usually get the feeling that the librarian is willing to help. Notwithstanding the promising beginning, I still found the reference librarian not so approachable in this case, because there are other factors considering the criteria of approachability.

During the process of in-person reference service, it is suggested in the guideline that the librarian “establish initial eye contact with patrons, and acknowledge the presence of patrons through smiling and attentive and welcoming body language.” (RUSA, 2004) This helps build the foundation for a friendly atmosphere and develop an easy and creative communication, which would more likely lead to a productive result. The atmosphere was created at the very beginning when the librarian asked me to wait a moment. Although she said it in a gentle way, I did not see her smile at all, which gave me an impression that she was reluctant to give the service and was not so approachable, while the other librarian beside her giving professional smile impressed me with his work in a very professional way. I could not help compare them both and thought to myself I would prefer the other one. In this reference process, except the initial eye contact for greeting, the librarian kept on avoiding my eyes and was not smiling at all. I got the impression that she had some other things on her mind and was quite concerned about that. Her voice was tender, but I still had the feeling that I might interrupt her during the middle of something and I felt neither welcomed nor
comfortable.

2. Interest

It is stated in “Guidelines for Behavioral Performance of Reference and Information Service Providers” that “While not every query will contain stimulating intellectual challenges, the librarian should be interested in each patron’s informational need and should be committed to providing the most effective assistance.” (RUSA, 2004) The impression that other persons take an interest in his query encourages the user to give more information about the reference topic and be willing to confide to others something about the object topic which in other ways would not be told.

When I asked for a book that would help me do tax return, the librarian responded by simply saying, “Ok...Let me see,” and searched in the U of A library catalogue immediately. She did not say any other words or give any expression showing any interest in the subject, and reference service she provided was just like one necessary part of her work and searching process was just one part of her responsibility.

Fritch and Mandernack (2001) wrote in their paper “The emerging reference paradigm” that “the librarian should be open to a mutual learning experience with the user, learning the true dimensions of the query, the user’s present knowledge and actual needs, and then responding appropriately.” As a result, the “interest” which is required for librarian to take in patron’s each inquiry should not be a forced or faked one. Instead, the librarians might take it as “a mutual learning experience.”

3. Listening/inquiring

About developing the reference interview, the Guidelines suggests librarians “rephrase the question or request and ask for confirmation to ensure that it is understood” and “use closed and/or clarifying questions to refine the search query.” (RUSA, 2004) During the interview process, care is required to avoid misunderstanding the user’s need or prematurely assuming one has fully
understood it. (Bopp & Smith, 2001, p.47)

Considering the result I got for this reference interview is not satisfying for me, I have been asking myself if I am responsible for misleading the librarian. However, the fact also is the librarian has not asked any reassuring reference question at all. The first question I put was “I’m looking for a book that tells me how to do the tax return...,” and then I added “...and I remember my friend mentioned a book called ‘tax’, ‘dummy’ or something.” I guess there is much space to explore in this subject area in the question being brought out and my main purpose by going to the desk is to ask for a useful, efficient and easy book to guide me to do tax return. Experienced reference librarians know that the original question put to them by a user is rarely the real question. Different people, with equally different needs, phrase their queries in different ways. (Katz, 2002, p. 130) However, in this case the question was treated in its easiest way, and the librarian picked the most comfortable part of the question and gave me the most convenient answer. Although there are obvious limits to the assistance which a librarian can undertake to render, (Green, 1993) like providing medical implications or legal suggestions to patrons, inquiry for information on DIY tax return is obviously not one of them. However, no efforts were put on inquiries, analysis or proper considering, and I was not given a chance to explain myself and make myself clear. Before I could give any more detailed information, I was given an answer and sent away.

Ross, Nilsen and Dewdney (2002) also believe that for a reference interview, “the eventual goal, of course, is to integrate all these skills into one seamless interview that moves smoothly from acknowledgement to an open question or two to a summary to a concluding statement that includes a follow-up question and an invitation to return.” (Ross, Nilsen & Dewdney, 2002, p.83) Hence, a good reference interview process would be a couple of open questions to clarify patron’s needs, followed by follow-up questions to confirm and an invitation for further exploration.
4. Searching

Concerning the searching component, RUSA puts that “the search process is the portion of the transaction in which behavior and accuracy intersect.” (RUSA, 2004) One of the reasons for people coming to the reference desk is that the librarians in the reference desk can provide the information sources to fulfill patrons’ information needs. Being able to locate the information and provide answers, in most cases, is the main job for librarians working in the service section, and the searching skills enable them to do that. Librarians in the reference desk are supposed to perform an efficient and accurate search to provide the right answer for information seekers.

In this unobtrusive evaluation case, the librarian put in the search terms “taxes for dummies” in U of A library catalogue and quickly found the book I mentioned. Although she went through some typing mistakes and yielded one Page not Found, I was still impressed by her sensible searching methods and her air of professionalism. Upon request, she also turned the screen to show me the whole process of searching and explained the search strategy and sequence, as well as the sources to be used. During the searching session, the librarian did well, although more sophisticated searching could be conducted on the same subject and more suitable and useful items might be located.

5. Follow-up.

The librarian is responsible for determining if the patrons are satisfied with the results of the search, and is also responsible for referring the patrons to other sources. (RUSA, 2004) Gers and Seward’s (1985) report of the Maryland study confirmed the crucial role in the reference transaction of the follow-up question and concluded that the follow-up question "may be the single most important behavior because it has the potential for allowing one to remedy lapses in other desirable behaviors." Librarians in the reference desk are required to ask confirmation questions to make sure the patrons get what they really need and also give notification inviting them to come back for further information.
After searching and finding the book I mentioned, the librarian even noticed that the book she found was an old one. It was published eight years ago and obviously it will not properly serve my purpose—provide guidance for my tax return this year. Some reference tools’ value decreases along with the growth of their ages, especially the tools with those contents that keep changing, reference on regulations and laws being one of them. However, she did not present further questions like “Is this book good for you” or “Are you looking for something newer,” although she did make up, to some extent, for the insufficiency in her answers by giving me detailed information on the direction.

Asking confirming questions may not be a reference routine procedure, as the results shown in some unobtrusive observation of some Ohio libraries participated in the OREI workshops, and “staff providing reference service in these libraries are usually approachable and friendly, but they usually do not employ the various strategies available to identify a patron’s hidden need and determine if the patron received what the patron wants.” (Watson, 2001) Sometimes, they did not realize a single confirmation question or an invitation would help in the reference interview, and in other cases they just intended to avoid more trouble and extra work.

Conclusion:
Unobtrusive testing has the advantage of demonstrating the effectiveness of the librarian when he/she is not performing to an audience and is probably more indicative of how he/she routinely handles reference queries. (Green, 1988) As in this unobtrusive testing, valuation is made on the most everyday and natural basis and the reference process is not influence by any special factors either on the identity of the participant or the evaluation purpose.

By using the evaluation criteria originated and revised by American Library Association’s subdivision Reference and User Services Association, the performance of the librarian in reference desk is divided and analyzed according to approachability, interest, listening and inquiring, searching and follow-up. For a
good reference service, the librarian is required to be easy to approach, willing to help, interested in the patron’s inquiry, asking for open question to get a whole view of the reference question, searching efficiently, asking follow up question to make sure the patron really get what he wants and giving invitation for the patron to come back for further inquiries.

In this particular case, the librarian seemed to be obsessed with something else when she was giving the reference service and, during the process of interview, did not show much interest in the subject I brought forward. She also seemed to avoid potentially more complicated search, and picked an easy part of the topic and then sent me away. No invitation was given for me to come back for further information.

Priority shall always be given to patrons who come to the reference desk, since it is decided by the role it plays in the whole library system that it is the interface between the library as an organization and patron as individual. Supported by complex and affluent information resources both inside and outside the library building, thus an information professional can serve as an information consultant, advising, training, and guiding clients on appropriate information sources. (Genz, 1998)
References


