

Information Services in a Complex Environment

The Good, The Bad & the Human Factor

Topics for today

- ☛ Identify gateways to resources we offer to clients – what is behind each “door”
- ☛ Identify characteristics of each “door”
- ☛ Consider communication techniques that help us understand the “real” question.
- ☛ Consider both customer service & the “teachable” moment
- ☛ Identify ordinary language to use rather than “library speak”
- ☛ Relax, no panic, have fun!

What is information or reference service?

- ☛ What words describe it?
- ☛ Who provides it?
- ☛ Where is it provided?
- ☛ What do you need to know to “do” it?
- ☛ What does the word “reference” mean to most people?

Reference service is . . .

The art of translating a user's question into a representation that "the system" will accept.

It is about providing the link between people and the "stuff"





What is good information service?

"Provision of information in the manner most useful to its clients is the ultimate test of all a library does."

ALA Guidelines for Information Services
Available online at: www.ala.org/rusa/std_consumer.html

Reference emphasis . . .



For more than 50 years, the emphasis was on sources.

More recently, the emphasis has been on communication with users.

Reference Services

Yesterday	Today
<ul style="list-style-type: none"> ☛ Corral desk: imposing, authoritative, intimidating ☛ Very large reference collection, although most seldom used ☛ A "just in case" model ☛ Staff stationary/you go to them ☛ Often an element of condescension 	<ul style="list-style-type: none"> ☛ Wandering on the floor ready to help where users are ☛ Very small print collection with electronic access as primary information source ☛ "Just in time" model ☛ Staff up & about offering help & meeting & greeting ☛ Much more of a "we" environment – you & I

Consider "the system" gateways

1. Print reference collection
2. ILS -- "the catalog"
3. Collection itself
4. Internet in general – Google search?
5. Proprietary databases library provides
6. Known reliable websites for topic
7. Referral to other source
8. Other?



1. Print reference materials

- ☛ Criteria for putting something in reference in your library?
- ☛ What does the term "reference" mean to us?
- ☛ What does "reference" mean to our clients?
- ☛ What are characteristics of a "reference source" really?



On a desert island imagine . . .

- You have good reliable Internet access including key databases.
- What 5 print reference sources would you also want? Why each of these?



So – what does this mean for what you need in your reference collection?

Studies about reducing print reference

- All types & sizes of libraries
- Most reduced print collection 10 to 30% of its original size without changing the ability of staff to answer questions
- Some materials went into circulating collection but many were simply withdrawn.
- Many mention the difficulty of getting rid of items that once cost a lot.
- This is the change from “just in case” to “just in time”.

2. ILS – the catalog!

- Usefulness depends on quality/reliability of records -- “garbage in, garbage out”
- Usefulness depends on what we choose to put in it – everything but the kitchen sink or only what we own in a physical format?
- Usefulness depends on functionality of software platform – ways to search, format of results, etc.
- Usefulness depends on which other libraries’ collections can be searched while searching your own holdings.
- Usefulness depends on user-friendly codes, language, etc.
- Other “usefulness” issues?

3. Collection itself

The usefulness of going directly to the collection depends on:

- ☞ Size of collection & facility
- ☞ Your knowledge of resources including collection strengths & weaknesses, authors & titles, and classification details
- ☞ General philosophy in your library regarding segmentation of information
- ☞ Staffing levels – are you free to walk off or are you the only staff member?
- ☞ What percentage of what you have is likely to be on the shelf!
- ☞ Other "usefulness" issues?



4. Internet itself – the web!

- ☞ Usefulness depends on "garbage in, garbage out" principles & skill of searcher. User be careful!
- ☞ Choice of search engine can make a difference.
- ☞ Usefulness will depend a great deal on your ability to:
 - Understand the real inquiry/question
 - Identify key words or concepts
 - Move from narrow term to broad term or vice versa
 - Consider various aspects of the key terms that will make a search more successful. (narrow or focus it geographically, chronologically, topically, or in some other manner)
- ☞ Other "usefulness" issues?

5. Databases & proprietary e-sources

- ☞ Usefulness is dependent on your skills:
 - Knowledge of what is available in terms of title & content type
 - Knowledge of how to get there ASAP. (no hassle!)
 - Experience searching
 - Understanding of codes, abbreviations, hot links
 - Knowledge of "how to" --- print, email, save, sort, etc.
- ☞ Usefulness is dependent upon the library:
 - To encourage "play" on these resources on work time
 - To hold staff accountable to knowing, using & getting skilled
 - To provide time for discussing discoveries, how-to info, fun stuff

6. Reliable websites

- ☛ Think in terms of what you use for your personal information retrieval.
- ☛ What do you or could you use for your clients' questions?
- ☛ Have you & the library bookmarked sites that are authoritative & you might use frequently? (on which computers?)
- ☛ How does a client find these sites without asking for help?

7. Referral to other source

- ☛ Phone call to the appropriate office, business, agency, etc. to answer the question.
- ☛ Ask another staff member.
- ☛ Provide directions to a location through a map, a diagram, Google Earth, or going out the door & pointing!
- ☛ Make a phone call to someone known to be an expert or to have knowledge of something. [respect confidentiality & privacy]
- ☛ Referring someone to another library [but first call & verify that this person can walk in & use resources. Find out what they might need as ID, if they will have borrowing privileges or just reference use, hours, contact person, etc.]
- ☛ Other?

8. Other gateways?



Communication

Being approachable:

- Be poised & ready to engage users by not being engrossed in reading, filing, chatting with colleagues, doing email, etc.
- Establish initial eye contact.
- Acknowledge the presence of the patron by smiling & having open body language.
- Acknowledge patron . . .
 - Friendly greeting to initiate conversation
 - Standing up, moving forward, moving closer to patron.

Skills for the first 30 seconds

- ☞ Nonverbal
 - Eye contact
 - Smiling & Nodding
 - Pausing
 - Posture
 - Tone of voice
- ☞ Oral
 - Acknowledgement
 - Repeating or paraphrasing
 - Listening



The reference interview

The purpose is to find out what the user wants to do & then provide information that will help reach that goal (not your goal or what you think should be the goal)

It is a purposeful conversation in which we ask questions to get a clearer picture of what someone wants to know and then to link the user with information or item through one or more of the gateways.



Findings of study*

- ☛ Users depend on library staff to help them.
- ☛ Complex info needs are "demanded" in small as well as large libraries.
- ☛ Users' questions appear to be easily answered but often are difficult.
- ☛ Clients depend on staff to find answers & to help them learn to use "the system".

* Dowdney, P. & Mitchell, G. (1996) Mental Models of Information Systems: A Study of Ill-Formed Queries Presented in Public Libraries. New York: A.A. conference presentation.



Is 55% right good enough?



- ☛ Studies show this as average for ref service.
- ☛ Even if correct, might not be useable because:
 - Incomprehensible to user
 - May be too late
 - Provided by a surly person (someone with "an attitude")

Common causes of failure

- ☛ Not acknowledging the user
- ☛ Not listening
- ☛ Talking over the patron
- ☛ Playing twenty questions
- ☛ Interrupting at inappropriate times
- ☛ Making assumptions
- ☛ Not following up
- ☛ Using library "speak"



Often these things occur

- Users ask for something very broad and general.
- Users ask for something specific but there is mismatch between it & the real question.
- Users aren't exactly sure how the "system" works.
- Keywords in the user's question are ambiguous.
- What is said isn't what is heard - pronunciation.
- User's question involves a reconstruction.
- User's question contains an error or misconception.

Real answers in context

- Questions are important in life of user.
- They want to use the information to do something.
- There is a difference between "correct" answer and "helpful" answer.

The purpose of the reference interview is to find out, quickly and tactfully, the context for the user's question, including the user's goal.

System-centered questions

- Have you looked in the catalog, MARC record, checked the shelves, etc.?
- Do you know the subject heading, key words, author, etc.?
- Do you want an encyclopedia, dictionary, bibliography, biography or an electronic source?
- Do you want books or articles?
- That book is out. Do you want to put a hold on it?
- We don't have that title but we could borrow it on ILL.

Can you identify the "library talk" in these comments?

User-centered questions

- ☛ What have you done so far?
- ☛ Where have you already looked?
- ☛ Can you tell me a bit more about your topic?
- ☛ What would you like the book/article/DVD to cover?
- ☛ How do you plan to use the information?
- ☛ What format would help you most? [give examples]
- ☛ For an inquiry about a specific item: Perhaps we have another X that will cover the same topic or we might have something in a different format such as . . .
- ☛ This might take us ___ to locate/figure out. Do you have that time today or can I contact you with further information or make an appointment for another time to work together on this?

Making users go away!

- ☛ Provide unmonitored referral.
- ☛ Immediately refer the user to somewhere else.
- ☛ Imply that the user should have done something else first.
- ☛ Try to get the user to accept more easily found information.
- ☛ Warn user to expect defeat.
- ☛ Tell user that the search has reached dead-end.
- ☛ Go away to "do something" and never return.
- ☛ Fail to explain what you are doing with each step.



Questioning skills

- ☛ Use open not closed questions.
- ☛ Avoid jumping to conclusions.
- ☛ Put the inquiry in context. Use sense-making questions. You need to know the situation, the user's gap in understanding, & how they intend to use info.
- ☛ Reflect content back to user.
- ☛ Have clear closure – the art of tactful ending.

Your suggestions for phrases for ending on a positive note?

Using inclusion

Inclusion is a way of making the other a partner in the search by explaining what you are doing. Using "we" not "you" and using "let's" not "I" or "you" when possible.

Inclusion is particularly useful when:

- The other person cannot see what you are doing.
- When the reason for your behavior is not immediately apparent to a lay person.
- When you want to instruct the user (& the user wants to be instructed).
- When you need to ask a question that might seem unrelated or inappropriate.
- When the user will have to wait.

Four steps for inclusion:

1. Acknowledge. Restate the problem, indicate that you are listening.
2. Describe briefly what you are doing.
3. Explain briefly why you are doing it.
4. If appropriate, indicate how much time the task will take.
5. If you know their name, give them yours. Levels the field.



Follow-up questions

- Can make the difference between "good" and "bad" reference service.
- Assures the user that it is okay to ask again.
- Assures the user that you are interested in helping them find what they need – not in getting rid of them.
- Encourages them to return to you if they need some additional ideas for their search.

Giving someone your name and/or business card also encourages them to ask more or return.



Helping people is what we do!

Regardless of where we work in a library or the size or type of library . . .

- ☛ We meet people of all ages where they are interacting with collections, computers or anything else. That is when we should offer assistance -- do reference!
- ☛ If someone does not want assistance, don't be a pest but do be available.

Stopping to think, pausing to reflect are practices that help both you & the person you are helping. It sends a message that you are taking them seriously & it gives you time to decide where to begin!

Information Services are . . .

- ☛ The fun part of what we do!
- ☛ We can get better with practice.
- ☛ We are the link between the "stuff" & our clients. Without us, the "stuff" is of little use to most people.

Be the strongest link you can be!



Thanks so much

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**All the best
--Mary!**
