Reference Observations Report

Philosophy of Service:

It is my belief that libraries that are attached to institutions of higher learning, whether they are technical schools, colleges, or universities, should primarily serve the students, faculty and staff of the institution of which they are a part. The Association of College and Research Libraries (ACRL) states in their *Standards for Libraries in Higher Education* that such a library’s role is to assist “in educating students, [and] achieving their institutions’ missions”. Libraries that are part of a higher education institution, then, should focus mainly on helping to educate the students of that institution, while still providing the informational needs of the students and faculty in a manner that fulfills their institutional mission.

Reference work and interactions are a vital component of this mission. It is explicitly stated in the ACRL’s *Guidelines for University Library Services to Undergraduate Students* that students “need to be introduced to the academic nature of the services and resources available in university libraries through a variety of means which may include library instruction, either one-on-one or in-class orientations and presentations…”, where reference interactions serve to “not only [answer] specific questions, but also [as] personalized instruction in the methods of identifying and locating research materials”. In a library attached to a higher education institution, then, I believe that reference interactions can serve as a teaching moment, in which the librarian acts as instructor (however informally) to help expand the students’ knowledge and abilities.

In the service of this goal, I believe it is important to note one key point put forth by the *Guidelines for University Library Services to Undergraduate Students*, which states that students “need a user-
friendly environment, where assistance is offered and questions are encouraged”. In this, I feel that making the students feel comfortable and encouraging them to engage with the information being presented is of the utmost importance. The Reference and User Services Association’s (RUSA) Guidelines for Behavioral Performance of Reference and Information Service Providers offer an excellent outline for providing service to students in such a way that serves the goal of encouraging and informative interaction.

Of course, as always in the library science professions, I believe that librarians at who serve at higher education institutions must strive to “provide the highest level of service to all library users through appropriate and usefully organized resources; equitable service policies; equitable access; and accurate, unbiased, and courteous responses to all requests.” (American Library Association, 2008)

Objectives:

My primary objective in engaging in these observations was to observe the different types of reference service provided by the librarians in a library attached to a higher education institution. For this reason, I chose to conduct my observations at a small library attached to a satellite campus of a larger university. This was a location that I had previously engaged with during an internship, which I chose to observe to allow for a larger sample (based partially off my past work) than a single observation period would permit.

I also had several secondary objectives in pursuing these observations. These objectives were: to observe the details of interpersonal contact in the reference interaction, and how these details affected the interaction; to compare reference interactions focused on information and information literacy to the interactions focused on technology questions; and to compare the in-person reference interactions with the virtual reference interactions.
To examine the details of interpersonal contact in the reference interaction, I took the opportunity to make general notes on the librarians’ behavior at the beginning of the interaction, as well as general notes on the patron’s reaction (if any) to this behavior. Unfortunately, it was not possible to get a clear indication of the impact of the librarians’ behavior on the interaction without conducting interviews with the patrons – an option that was dismissed as being too invasive, as well as disruptive to the librarians’ work.

As part of my attempt to compare the reference interactions focused on information and the interactions focused on technology questions, I arranged my observations during one of the busiest periods of the day, when many students were likely to engage the librarians’ services, in hopes of getting at least one interaction of each type. I also noted, as much as possible, the differences in librarian behavior and patron behavior between these two types of interactions.

The secondary objective I was most interested in was comparing the in-person reference interactions with the virtual reference interactions. Due to the nature of my observations (discussed below), my direct observation of virtual reference interactions was nil. Instead of notes on my direct observations, I requested (and received) transcripts of several chat reference interactions that had occurred only a few minutes prior to my observations. I also conducted very brief interviews with two of the librarians whom I did not observe directly, to get their opinion on virtual reference interactions, specifically interactions via the chat and email services. It was mentioned and noted that different user groups tended to use different services for their reference interactions (e.g.: long-distance students using email, faculty patrons using the phone, etc.), which may cause slight discrepancies between the different services.
Background Information:

I conducted my observations at the library of a small satellite campus of a larger university on April 17, 2013, from 1 p.m. to 5 p.m. Before observing, I obtained permission from the library director to come in and watch the reference interactions.

The library itself is not large. It consists of two rooms: a main room with a small print collection and a smaller video and DVD collection, and a secondary room (with a specialty LaSallian education collection) that is primarily meant for quiet study. There are six computers and one printer in the main room, and five computers in the secondary room.

This particular campus of the university offers courses in medical fields (primarily nursing and therapy programs), business, and educational fields. The campus offers bachelors, masters, and doctoral degrees, with most of the students in either a graduate program or a program focused on professional skill development. Virtually all of the students are adults above the traditional age for college attendance. Many of them are professionals who attend class as well as working. Most of the students are not on campus every day, and there are several distance-learning programs that operate through the campus. For this reason, much of the library’s collection and resources are electronic to allow off-campus access. It is also worth noting that all of the students, regardless of their program, take an introductory course that includes library orientation and an introduction to online resources.

Before I began my reference observations proper, I had the chance to conduct brief interviews with two of the librarians about the virtual reference services the library provides. These interviews were very informal, in that I merely asked their opinions and had no set questions. During the time I was observing, I had the chance to watch two different librarians conduct reference interactions. The first was working at the main service desk from 1 p.m. to 3 p.m., and the
second was working from 3 p.m. to 5 p.m. This gave me an opportunity to observe any differences between the librarians.

The time of the observations was chosen specifically to coincide with the busiest time of day in the library. All of the classes on the campus are conducted in the evening, with the earliest beginning at five o’clock. Many students come to the library to work and finish assignments before their classes, which made the afternoon the best time to conduct these observations.

The observations themselves were conducted by sitting at the desk with the librarian, behind and off to one side so as to be as unobtrusive as possible. When the librarian stepped away from the desk to engage a patron, I observed from as great a distance as possible, while still being able to see and hear details of the interaction, so as not to crowd or annoy the patron (especially when the patron was at one of the small computer cubicles). Every effort was made not to interfere with the patrons’ interactions with the librarians, and not to engage with the patrons without the librarian present (although this was not always successful).

Observations:

Please note that efforts have been made to remove all identifying information for privacy purposes. Librarians will be identified by a consistent number throughout.

I began my observations with a very brief, very informal interview with two of the librarians that I did not observe directly. The purpose of these interviews was to get their opinions on digital forms of reference service, as well as their opinions on the performance of the reference interview. Both librarians mentioned that they feel the digital reference services get a lot of use by students, and they have no complaints with the digital services. Librarian #2 noted that different types of patron tend to use phone versus email/chat services – faculty and staff tended to call on the phone, while students generally emailed or used the chat service to contact librarians.
When discussing the use of the reference interview, Librarian #1 noted that, while they tended to follow the model of the reference interview, they often did not complete a “full” interview. Especially during chat interactions, they said, they often forget to ask, “Is there anything else I can help you with?” at the end of an interview. Librarian #2 concurred with this statement, adding that they often didn’t remember to ask until after the patron had left the chat.

The first librarian I had the opportunity to observe, Librarian #3, followed many of the approachability guidelines put forth in RUSA’s *Guidelines for Behavioral Performance*, mentioned above. There was a permanent sign attached to the rear of the computer monitor at the service desk (on the side visible to patrons approaching the desk), that says, “Please interrupt me! Your question is more interesting than what I am doing”. In addition to the sign, Librarian #3 was very consistent in looking around at the patrons in the library frequently in case they wanted assistance but did not wish to approach the desk. For patrons who did approach the desk, the librarian always looked up and smiled as they approached, often asking if they could help with anything, as the patron got closer.

Librarian #3 received mainly technological questions while I was watching. When I asked about the prevalence of technological questions, it was noted that there was no service at the university that offered basic instruction or help with programs like Microsoft Word or Powerpoint. While there was an Information Technology department that would assist with printer issues, they noted, it often would take longer to call and ask them to come down than it would to fix the problem themselves.

The most notable question that Librarian #3 dealt with was a patron who was having difficulty formatting a Word document. The patron engaged the librarian multiple times with different questions on formatting, including issues with headers, page breaks, page numbers, and other details.
This interaction is worth noting, despite the fact that it may not be technically considered reference work, because of the interaction between Librarian #3 and the patron. At first the librarian was having difficulty understanding what the patron was saying, and what they were trying to do. The communication difficulties notably frustrated the patron in the beginning. Perhaps responding to the patron’s discomfort, the librarian asked for more specific details, for example: “What are you trying to do?”; “What is the problem with this?”; “Tell me exactly what you need.”

This language, while not perhaps very welcoming, did result in more specific and understandable information from the patron, which in turn allowed the librarian to assist them more effectively. When the patron returned to ask more questions later, the librarian maintained this trend of asking for specifics, and there was less confusion on both sides during the later interactions. It is worth noting that a behavior that did change between the multiple interactions was who performed the specific actions. The patron expressed a preference to run the mouse and type during the first interaction, but allowed the librarian to use the mouse and keyboard to demonstrate during subsequent interactions with no complaint.

The second librarian I observed, Librarian #4, received more information-based questions. Specifically, about half of the questions received during their two-hour shift at the service desk revolved around finding informational sources (the remainder were equal parts technological and circulation questions).

Librarian #4 seemed especially adept at changing tack in the middle of an interaction to adapt to the patrons’ perceived skill level. For example, during the first interaction I observed with them, they easily switched from primarily verbal, general explanation of how to search a database to very explicit instructions, including demonstrations, on how to scroll using the mouse and where to click to submit a search form.
The librarian also made a point to clarify the questions of any patron they interacted with who had more than a very basic interaction (e.g.: returning a book, asking them to refill the printer paper). This was especially apparent during the interactions revolving around finding information, but was also noted in questions about interlibrary loan materials and formatting documents.

**Specific Interactions:**

This interaction was observed between the second librarian I observed and one of the patrons sitting at a computer in the library’s main room. This interaction took place at approximately 3:15 p.m. Note that this interaction was observed at a distance to avoid crowding the patron. As such, some of the librarian and patron’s actions, the activity on the computer screen, and specific search strings were not visible.

[Patron is working at one of the computer terminals. Patron looks over to the librarian at the desk and raises a hand, and librarian stands and moves over to the computer terminal. Patron remains seated and librarian remains standing.]

PATRON: I need to find articles on marketplace interactions in countries.

LIBRARIAN #4: What do you mean?

[Patron's response is unintelligible.]

LIBRARIAN #4: Can you give me an example?

PATRON: Like, the marketplace regulation… [unintelligible]… in Belgium.

LIBRARIAN #4: Well, let's try looking at the business database. You go to the website, then the database list, and let's go with the first option. Try searching “Belgium” in the first box.

[Patron types.]

LIBRARIAN #4: In the second box, try “regulation”, and could you put “market” in the last one?

[Patron types.]

LIBRARIAN #4: Okay, go ahead and try searching that. [Patron and the librarian spend a few moments looking at the results.]

LIBRARIAN #4: So, “financial regulation”, “government regulation” is a term they use…

[Librarian points to the screen.]

PATRON: Can I look at this one?

LIBRARIAN #4: Yes, click there to see the full text. [Librarian points to screen.]

LIBRARIAN #4: Is that okay?

[Patron nods.]

PATRON: Yes, that’s okay.
I am not sure that I would classify this interaction as completely successful, although the user expressed satisfaction with the results that were found. The patron’s behavior seemed to indicate that the search that was used, based off the librarian’s clarification of the question, was not exactly what they were looking for. Though they never expressed it, their immediate acceptance of the first result to come up suggests (to me, at least) that they were not happy with the way the interaction was going and did not wish to continue. I believe the librarian got the same feeling off the patron, as evidenced by their behavior at the end of the interview, namely waiting a few moments to see if the patron was going to ask another question.

This next interaction was observed between a patron that approached the desk and the librarian. This interaction occurred at about 4:30 p.m.

[Patron approaches desk. Librarian looks up and smiles as patron approaches.]

PATRON: Do you have any books on acculturative stress or acculturation?
LIBRARIAN #4: Are you in the therapy program?
[Librarian gestures for the student to step around the desk and sit on an available chair, positioned next to the librarian with an easy view of the computer screen.]

PATRON: Yes
[Librarian searches the library catalog, using keyword search and search string “acculturation”].
LIBRARIAN #4: Okay, we seem to have some stuff here…

PATRON: There’s nothing about acculturative stress?
[Librarian points to a title on the screen, then clicks through to the full item record.]
LIBRARIAN #4: This might have something
[Patron nods. Librarian writes down call number.]

PATRON: There’s nothing under acculturative stress specifically?
LIBRARIAN #4: I’m going to try that now.
[Librarian searches the library catalog, using keyword search and search string “acculturative”. Few results come up, perhaps two pages of titles.]
LIBRARIAN #4: I’m not going to add “stress” because the results are already too narrow. Some of these may not focus on it, but they may have sections on it or references, which may lead you to something. Would you mind an ebook?

PATRON: No? I just can’t access it over the internet.

LIBRARIAN #4: Yes you can.

PATRON: Oh, okay.
[Librarian switches to the ebook database, searches using keyword search and same search string as above.]
LIBRARIAN #4: Here’s one. [Librarian points to title on screen. Patron takes a few moments to read the information on the screen.]
PATRON: That’s a good one. How do I access this?
LIBRARIAN #4: If you want, I can send you the link. [Patron nods.]
LIBRARIAN #4: What’s your email address? [Librarian writes email address down, and then takes patron to find the desired print book on the shelf. Patron checks out print book and leaves. After one more search, the librarian follows up with an email to the patron, containing the link to specific ebook desired, as well as links to search results for ebooks.]

I believe this was the most successful interaction that I witnessed during my observations. The patron had a clear question ready when they approached the desk, and was very straightforward about what they wanted. While they expressed some dissatisfaction with the initial results, they clearly understood the librarian’s explanation for the searches used and accepted the alternative direction for the searches happily. The patron actually chose to get several books besides the one the librarian suggested, based off the librarian’s suggestion that certain volumes may have chapters on the desired subject. The fact that there were a number of ebooks available on their desired subject clearly made the patron happy, and at the end of the interaction they seemed quite satisfied with their results.

This interaction occurred about half an hour before I arrived to perform my observations. It was kindly provided by one of the librarians as an example of the chat-based reference services using the LibrraryH3lp chat program. The transcript was copied directly from the program, with only minor modifications made for privacy purposes. Timestamps for each line are included.

12:20 PATRON: Hi, I'm currently attempting to access the MFT [Note: acronym used for the marriage and family therapy program] journal search from off campus, but I am unable to sign into EBSCOhost. I don't know the username or anything like that. ny suggestions?
12:20 LIBRARIAN #3: Hi, this is the librarian.
12:20 LIBRARIAN #3: Unfortunately, the MFT journal search doesn't work as easily off-campus as it does on-campus.
12:22 LIBRARIAN #3: Here's a link to instructions for the work-around: LINK
12:22 LIBRARIAN #3: Remember, too, that the search won't work at all in Internet Explorer.
12:22 PATRON: I have been using that link, but step 3 asks me to sign in and I'm unable to do so, and I'm using google chrome.
12:22 LIBRARIAN #3: Details here: LINK
12:22 LIBRARIAN #3: Oh, about signing in. Sorry.
12:23 LIBRARIAN #3: Let me take a look.
12:23 PATRON: thanks.
12:23 LIBRARIAN #3: An EBSCO account is something you set up yourself, after you've logged into the database with your username.
12:24 LIBRARIAN #3: I take it you had no problem getting on the database itself?
12:24 PATRON: yes, but I don't recall ever setting up an account. so I will give that shot.
12:25 PATRON: got it to work! Thank you!!
12:25 LIBRARIAN #3: Hooray!!!
12:25 LIBRARIAN #3: You can use that EBSCO account for all sorts of useful things, like saving articles and citations for your research.
12:26 PATRON: awesome!
12:29 PATRON has left the conversation

I believe this interaction was successful from the patron’s perspective, given their expressions of satisfaction at the close of the interaction. It is clear that they got the information they were hoping for and were able to solve their problem. However, if I were the librarian in this case, I would have considered it an unsuccessful interaction. This is simply because the patron was initially referred back to the same sources they were clearly already using, and were not helped. I believe this is simply a case of the librarian either not reading a question closely enough, or not taking the time to clarify the question properly before trying to answer it. The librarian seems to have caught themself about halfway through, however, and was able to identify their mistake and turn the interaction around from a potential frustration for the patron into a successful reference interaction.

Commonalities:

During and after performing my observations, I noticed several common behaviors of the librarians that were repeated in each interaction, and by each librarian. The first of these behaviors was the attempt to seem open and friendly to any patrons with questions. Both librarians that I
observed made a point to look up at every patron, smile, and either extend a greeting or ask how they could help. As previously mentioned, this conforms nicely with many of the guidelines for approachability laid out in the RUSA *Guidelines for Behavioral Performance*.

Another common behavior that I noticed was a preference for beginning any in-person reference interaction with a question or series of questions to establish the details of what the patron is trying to do. Even when a patron approached with a technological question (like formatting a document), the librarian's first response was almost always to ask questions and clarify the goal. In some cases, these questions were asked while preliminary searching or preparation for searching was occurring, while in other cases they were asked before the librarian did anything. It is interesting to note that the chat interactions provided for my perusal did not follow this same format, and neither did the basic circulation questions.

All of the librarians also had a tendency to forgo any kind of check-in with the patron at the close of the interaction, to check if the desired goal had been met. In some observed cases, these questions did occur in the middle of an interaction, in which case the librarian responded to negative answers by changing their tactics and continuing the interaction, but it rarely occurred at the end of the interaction.

Finally, the most interesting common behavior that I noted was the ability and tendency of the librarians to adjust their methods of delivering information in the middle of an interaction. This always seemed to occur in response to confusion or difficulty on the part of the patron. It almost always seemed to have a positive outcome, whether that was the patron indicating their understanding, successful continuation of the interaction, or simple body language on the part of the patron that indicated the change was appreciated. I found this behavior intriguing, because it was frequently a near-seamless adjustment on the part of the librarians, which was clearly meant to cater to the patron's level of ability and help them get more out of the interaction.
Suggestions for Improvement:

The area that I believe need the most improvement at this particular library was the librarians’ habit of not following up or finishing the interaction by confirming that the patron has found everything they needed.

Librarian #1 and Librarian #2 mentioned this habit specifically in regards to chat reference services, stating that it was difficult to remember to do so. I agree that in chat services, it can be difficult (it is, after all, very difficult to ask the patron if they found what they wanted when the patron has already left the chat space).

However, I noticed this habit in the in-person interactions with Librarian #3 and Librarian #4 as well. As mentioned above, they occasionally would ask if the patron was satisfied or had found what they wanted, but this almost always occurred when the patron responded with a negative. Whether this is simple chance, or whether the librarians were using the question as a gauge of satisfaction when they suspected the patrons were less that pleased, I do not know.

It is interesting to note that only once during my four hours of observations was this question of satisfaction posed and answered with a “yes” by the patron, and it did serve as a close to the interaction.

In general, though, I feel that some sort of follow-up should be implemented with more regularity in the library. It need not necessarily be the particular question of “Do you need anything else?” or “Is this what you were looking for?” (as I do believe those questions serve an equally important position as check-in points during the course of an interaction). There are a number of other options for follow-up, and it could be as simple a statement as “Let me/us know if you have any more questions.”
While I do feel that the librarians have an excellent report with most of the students who come seeking reference help, making sure to follow the interaction with an invitation to come back for more help, or even just confirm that patrons are finished with and satisfied with the interaction can only improve the perceived quality of the library services.

It may also be worth the effort for the librarians to solidify their efforts to clarify the question before beginning their searches. While most of the interactions began with some clarification questions (as I mentioned above), the librarians did not make the effort to do clarify or even restate the question if it was perceived to be straightforward. An example of this would be the second transcript above, where the patron came to the desk with a clear question, and the librarian did not make an effort to clarify or even restate the desired goal. This particular interaction seemed to have a successful outcome for the patron, but as the final transcript above demonstrates, not checking the perceived question with the patron may lead to some less than desirable initial results for the patron, until the question is made clear.

**Evaluation:**

This assignment, and particularly the observations that I performed for it, were very helpful for me in understanding the importance of reference service (especially in academic libraries), as well as the forms it can take. While I was aware, both from some of the articles read for class and my own personal experience, that reference librarians receive a lot of questions that are not precisely reference-related, it was still enlightening to observe the interaction at this library and note exactly how many of the questions were non-reference.

The chance to analyze my observations and write them out offered an excellent opportunity to reflect on what I had seen and what it really means in terms of the librarians’ duties in an academic library. I found it particularly interesting to note how much of the theory and practice
behind reference interactions, including customer service skills and teaching ability, the librarians seemed to use in other types of interactions.

It may not, strictly speaking, be a librarian’s “job” to teach students how to format a Word document or print double sided – but the simple fact of the matter is that it is that there may not be any other place for students to learn these skills. I feel that the experience with teaching in a non-formal or one-on-one setting that librarians have from their reference work is ideally suited to this sort of instruction, and I saw ample evidence of it during my observations.

I think it would have been more beneficial, however, to set up a number of these observations over the course of the semester, rather than just one or two sessions. It would have been interesting to have a few hours of observation every month or so, to write out and analyze. The opportunity to go back to the observations after the initial analysis and observe again, and take note of any specific details that were noted the first time around, would have been even more beneficial for me than a single session was.

It was interesting to notice how often I found myself recalling points from our in-class discussions, especially our in-class discussions of serving patrons and the tricks thereof, when I was observing the librarians. They often used many of the points brought up in class, seemingly without realizing what they were doing. It was interesting to see some of the behaviors mentioned in class in their natural habitat, being used by librarians who seemed to access those skills utterly on instinct, without needing to step back and assess or think about what to do next.

Seeing the behavior of the reference librarians made me simultaneously hopeful for myself and somewhat despondent over my own lack of ability. Even in writing up this discussion, I find myself swinging between thinking, “They make it look so easy! I can definitely do that.” and “They make it look so easy! I don’t think I’ll ever be that comfortable or capable with answering reference
questions.” But in this, too, I found myself recalling a number of the discussions we had on the
topic of confidence and patron’s endless capacity for patience in class.

At the end of it, I am glad I had the opportunity to observe reference work simply for the
sake of observation. It was a very different perspective than the one I had had in the past when
observing. If nothing else, I look forward to using some of the behaviors I observed in my own
work to improve my own performance.
References


The best examples of customer service philosophy and a step-by-step guide on how to create your own one. Find your template in the article Customer Service Philosophy Behind The Success Of 10 World-Known Brands. 10 November, 2020 Author: Anastasia Sukhareva Reading time: 17 min. Content: Strong philosophy as a key to everything we call Great customer service. 5 commandments of a strong customer service. The best examples of customer service philosophy to inspire you. The service concept outlines how a service provider can realize the value and desired outcomes of its services. The service concept can best be described as the way in which an organization would like to have its services perceived by its stakeholders. It describes the non-tangible aspects of service deliver. Continue Reading. Also, our personal philosophies are constant works of progress. As we challenge our limiting beliefs, strive for further growth and development, and experience and learn mor. Continue Reading. A strong customer service philosophy is not something you can create overnight or simply add on top of your business, like the icing on a cake. Instead, a customer service philosophy is a mindset that has to come from the core of the company. By implementing a philosophy that puts the customer first, you’ll empower your team to do their greatest work and keep your customers front of mind at all times. Here’s how and why it is important to have a customer service philosophy through unified support for your business. Proactive service is the key to success for an effective customer service philosophy. Traditionally, companies were used to sitting back and waiting for the questions to roll in. But to compete in today’s marketplace, you have to make the first move on customers from acquisition through, and beyond, retention. Be proactive when it comes to building your customer base and address customer issues quickly and solicit relevant customer feedback.