“I’m confused on how to look at the articles,” a student asked at the beginning of a recent chat reference session.

The chat librarian, Nancy Huling, wondered what this meant. “Was the student trying to open articles she’d already found? Or was she trying to figure out how to find articles on her topic? Or???”

To get to the student’s real question, Nancy, who is the head of Reference and Research Services at the University of Washington Libraries, had to ask some questions of her own. In this case, it only took two:

“Have you already found articles you want to read?” (she responded that she didn’t know how to use JSTOR or other databases)—that told me that she didn’t have articles and probably did have a subject, hence my next question: ‘What is the topic you’re working on?’ Thankfully, that question elicited the exact information I needed: her topic, which was for a sociology assignment we work with every spring!”

The reference interview—finding out what a patron’s true question is and whether you have answered it—has always been a crucial tool in the reference provider’s belt. After all, it’s not hard to spend a lot of time and energy answering the wrong question. But virtual reference—e-mail, chat, instant messaging, texting, and other online reference services—poses challenges for reference interviewing that make it tempting to skip the process altogether. When online, many of the natural cues we rely on for communicating are stripped away, leaving reference providers with nothing but the written question itself.

Toby Thomas, Seattle Public Library’s Virtual Services librarian, says: “Online, you lack many of the physical and aural cues that help us determine the level, age appropriateness, English language proficiency, mood, urgency, inflections, tone, etc. of messages. It can feel like [a game of] ‘twenty questions’ when you’re just getting started with a reference interview online, because we start from a disadvantage by only seeing the words that are typed in.”

The text-based setting of most virtual reference—chat in particular—poses an additional challenge: you have to be a good typist! Nancy observes that, “despite the use of computers and texting, there are a number of patrons and librarians who do not possess good keyboarding skills and it is a struggle for them to type enough information to be helpful…. I’ve also noticed that typos can completely change the meaning of a sentence: e.g., instead of saying ‘I am now going to recommend some sources’ the librarian types ‘I am not going to recommend some sources.’ You can bet that the patron will decide it’s time to leave the discussion!”

Chat reference can move very fast, and can make reference providers feel that they have to find answers much more quickly than they would at a physical reference desk. As Toby describes it, “In chat reference, you sometimes feel that you need to speed up the interview part and get to the helping part.” But contrary to the expectations of users and reference providers, “what might take just a couple of minutes in person, can turn into a much longer interaction online. For instance, demonstrating how to use online library resources to find articles about a research topic can be done relatively easily in person by showing someone where to click and doing a sample search while they watch. But when we’re helping someone online, we have to provide instructions that are clear and easy to follow, with enough detail that the person can reproduce the search on their own.”

E-mail and other asynchronous questions provide their own pacing problems. Since each response from the patron or the reference provider can lead to a significant wait, reference interviews can be truncated or reduced to a single follow-up or invitation to the patron to write back with further questions, when more complex probing and questioning might really be what’s called for. Even chat is not truly synchronous. As Nancy explains, “The patron and librarian are sometimes sending messages simultaneously and thus the meaning can be lost—or the back and forth exchange happens so quickly that the librarian can miss some patron dialogue.” According to Toby, the timing of chat responses is an art: “There’s a rhythm that needs to develop when you’re helping someone online so that messages are sequential, and it can be very easy to get out of sync during a chat session. For example, if we ask more than one question at a time, we might not be allowing enough time for the patron to respond to each question. In the virtual reference realm, I think we need to strike a balance between giving time for people to provide us responses to

In live virtual reference, listening = reading."
the questions we ask and responding to them regularly enough to let them know that we are still with them.”

Virtual reference has some advantages, too. Nancy pointed out to me that “there are as many barriers and obstacles to conducting the F2F [face to face] reference interview (or dialogue) as there are in the virtual realm. I first recognized this when I helped a student who indicated that his English was poor. His written English was fine and after I’d answered one question, he asked if I could answer a few more. At the end of our conversation, he said he was very grateful for the chat service, since his accent made it impossible for library staff to understand him and he’d given up asking for assistance F2F!”

**Tips for Conducting Reference Interviews Online**

The basic premise of a reference interview is the same no matter the format it’s conducted in: figure out what the patron is actually looking for, and then make sure you’re actually finding it. The following tips and tricks can make the virtual reference interview go a little smoother:

*Communicate clearly.* Clear communication is always important during a reference interview, but it’s particularly important in virtual reference because the patron can’t see what you’re doing. Nancy says, “I usually apologize upfront by saying something like ‘I’m going to need to ask some questions so that I can determine what to recommend.’ And I also thank the patron for being patient (which, of course, helps the person to be patient!).”

It’s particularly important to communicate with chat patrons while you’re searching for information. It’s okay to take some time to perform a search, but just let the person know how long you think it will take, and try to check in frequently to let him or her know how the search is going. “If they don’t get a message from us every minute or two, they don’t know whether we’re actually searching for information or whether the chat software has failed, we’re helping someone else, or we’re just really slow at typing,” says Toby.

*Read the question carefully.* The purpose of a reference interview is to go beyond a patron’s literal question to uncover the true information need. But this doesn’t give you license to ignore the patron’s words. As Nancy puts it: “In live virtual reference, listening = reading. Librarians must read and re-read the patron questions and comments carefully.”

*Be willing to move the question to another format.* Sometimes the best way to get more information from a patron who has asked a question by e-mail is to make a phone call. But, as Nancy cautions, don’t be too hasty to get out of the virtual setting: “If a student asks a hairy research question through chat, the student should not be lectured on why this isn’t a good medium for that question. Rather, the provider should offer some initial assistance and indicate that further work is needed and follow-up will be necessary. The patron should never be made to feel he/she used poor judgment in electing to ask a question through chat/IM.”

*Find out the timeframe.* In all types of virtual reference, it’s crucial to find out what time constraints a patron is under. Don’t assume a person is in a hurry just because he or she is asking a question online. But make sure to find out—there’s no sense spending two days crafting a response to an email question if the patron needs the answer within the hour.

Both Toby Thomas and Nancy Huling are of the opinion that reference providers should not assume too much about patrons’ expectations. “I think we believe that patrons want immediate answers, and in fact we do see that from time to time,” says Nancy. “But we’ve found that most students—and other patrons—simply want guidance in how to get started on their research, and they are also perfectly happy with follow-up.” “I do think that people tend to expect a chat transaction to last a shorter amount of time sometimes,” Toby told me, “but generally patron expectations are the same whether in person or online. People want quick and friendly help—and of course information that helps answer their question!”

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