

# Reference Interview & Instruction in Reference

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# Introductions

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# Agenda

1. Learning Objectives
2. Brainstorm on good/less than optimal customer service
3. Patron and librarian goals
4. The reference interview and its process
5. RUSA Guidelines (1-3)
6. Hands-on practice
7. Instruction in reference
8. RUSA Guidelines (4-6)
9. Hands-on practice
10. Referrals

# Learning Objectives

1. Describe the connections between customer service and the reference interview.
2. Demonstrate the stages of the reference interview process as articulated in the RUSA Behavioral Guidelines.
3. Articulate the importance of incorporating instruction in the reference interview.
4. Identify teachable moments in reference encounters.

# Group Brainstorm

Let's brainstorm adjectives describing good and less than optimal customer service.

Who has interacted with a reference librarian before and if so, where did your experience land in those adjectives?

# Goals

## Patron

1. Find the information they're asking for.
2. Complete the project they are working on.
3. Understand how to use our many research tools.
4. Successfully navigate library policies and organizational structures.
5. Developing critical thinking, evaluation, and academic research skills.

# Goals

## Librarian

1. Demystify our large and complex research ecosystem.
2. Recognize, value, and build on the experiences and skills patrons bring to the reference conversation.
3. Establish relationships and build trust between patrons and our library system.
4. Prepare students to be informed, information literate citizens.

# Reference Interview

## Definition & Characteristics

- Formalized process for providing professional service
- Has Professional standards – the RUSA Guidelines
- Has an organized but flexible structure
- Treats people as individuals, and recognizes diverse needs and experiences of patrons



# Reference Interview

## Working with patrons

- Assessing prior research experience and confidence
- Addressing research anxiety
- Building trust and developing an ongoing relationship between patron and library
- Acknowledging how complex the UIUC Library and Campus are, even to people who have been here a long time

# RUSA Guidelines 1-3

## Structure

- **Inclusion, Approachability, Engagement**
- Critical goal is establishing rapport
- Role of the opening – “first five” in writing tutoring
- Characteristics and roles of **open and closed** questions
  - See Handouts

# Hands-on Practice 1

Split up into pairs. Decide who will be the patron and who will be the librarian; then you'll switch (5 minutes for each role).

- Patrons select a topic from the *Topics for Reference Interview* handout and approach the librarian at the "desk"
- Librarians begin the reference interview by restating the question and then using the open and closed questions in the box below this one
- Keep in mind what we discussed about how to negotiate the question as well as incorporating RUSA behavioral guidelines 1: Inclusion, 2: Approachability, and 3: Engagement
- Share experiences with the whole group (5 minutes)

# Instruction in Reference

- The reference interview is an educational experience
  - Connected to learning objectives of the institution
  - Helps patrons develop as lifelong learners
- Identify instructional opportunities during the questioning phase
- Constructivism and scaffolding
- Prioritizing what and how much to teach

# RUSA Guidelines 4-6

- **Searching**
  - Help construct a search strategy
- **Evaluation**
  - Work with them on assessing which sources are most appropriate
- **Closure**
  - Not the end
  - Role of referrals
  - Ensure that their need has been met and invite them back!

# Hands-on Practice 2 – Identifying and Addressing Instructional Opportunities

*Remain in your established pairs of librarians and patrons.*

1. As a patron, what would you need to know in order to accomplish your research goals for the sample topic?
  - a) Consider practical and logistical needs like finding and using appropriate search tools, finding full text, etc.
  - b) Also consider educational goals that instructors might have for the assignment, lifelong learning research skills, and development of critical thinking.
  - c) Write down and prepare to share ideas you discuss for a&b.
2. As a librarian, how would you identify where the patron would need instruction?
  - a) What techniques could you use to identify patron experience and comfort level with research, and gaps in understanding?
  - b) What are some ways you could address those gaps when you identify them?
  - c) Write down and prepare to share ideas you discuss for a&b.

# Referrals in Reference

Everyone here will have to refer patrons at some point! Here is why it's important:

- Referral policy in GA manual
- Don't be the dead end
- Don't assume you've answered the whole scope of the patron's question
- Specialists rely upon referrals
- Expand patron's relationship with the library and its wealth of expertise

# Wrap-up

Reflection after reference interviews



# Have fun at the desk!

Thank you!



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