A Core Skill of Reference and Information Services
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## Outline

- Why Conduct a Reference Interview?
- Before a Reference Interview
- The Reference Interview
- Trends in Reference & New Technologies
- Tailoring to Different Ages and Populations
- Break
- Deep Dive: Negotiating the Question
- Practice
- Wrap-up

# Why Conduct a Reference Interview?

Is it really necessary—every time?

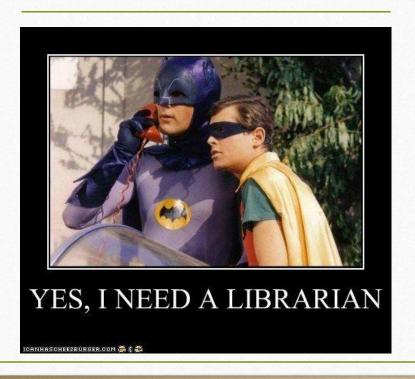
## Why Conduct a Reference Interview?

- Benefits:
  - Increases Patron Satisfaction
  - Increases accuracy
  - Saves time
- According to Hernon and McClure (1986), 55% of patrons reported they did not get what they needed from a librarian.
- According to Durrance (1989), users were more likely to return if staff members made them feel comfortable, showed interest, and appeared non-judgmental about the question, even when they received an inaccurate answer.

## Why Conduct a Reference Interview?

- Patrons questions may appear easy to answer, but are often difficult. Simple requests often mask complex information needs requiring a range of resources.
- Patrons working through a complex problem have demonstrably more positive outcomes when they are able to interact with a live partner.
- Problem solving abilities improved because of "reflective verbalization" that resulted from librarian questions. (Wetzstein and Hacker, 2004)
- Many of our patrons are not problem-solving experts, but we are!

Lots of assumptions are made before the patron even walks into the library!



- Patrons' thoughts and feelings about the library, and research in general, influence IF and HOW they ask us questions.
- Many patrons will never ask a question, even if they really do need assistance.

- Sometimes patrons will not ask us questions.
  - Library anxiety feeling overwhelmed by the size, feeling lost, or fearful, not knowing where things are located.
  - Bostick (1992) Library Anxiety Scale:
    - Barriers with Staff (Staff is intimidating or unapproachable)
    - Affective Barriers (feeling like everyone else knows how to use the library)
    - Comfort with the Library (Feeling unsafe or unwelcome in the library)
    - Knowledge of the library (Feeling like they do not know how to use the library)
    - Mechanical barriers (feeling anxious for not knowing how to use equipment/resources)

#### Ways patrons compensate:

- Observe librarians giving instruction to other patrons.
- Search Library website for information or guides.
- Ask a 'friend' who is more knowledgeable.
- Have a 'friend' ask the question.
- Leave dissatisfied.

#### 'Friend'

'Friend' in this case can be a parent, guardian, aide, teacher, assistant, or generally anyone else present whom the patron knows and is more comfortable with. In some cases, this 'friend' can be a complete stranger.

(Robinson and Reid, 2007)

- Patrons can sometimes ask a question that doesn't quite fit their information need.
  - A patron's mental model of the **library** or their **question** can be inaccurate.
  - What is a mental model?
    - A mental model is an explanation of how something works. The phrase "mental model" is an overarching term for any sort of concept, framework, or worldview that you carry around in your mind.

# A Patron's mental model of the **library** might be inaccurate. Such as:

- The library operates like a grocery store, where you are largely self-sufficient, but you can ask an associate a quick question about where the ketchup is located.
- They do not know that Reference Librarians are there to help research and formulate questions.
- Reference Librarians are busy and shouldn't be bothered.
- Libraries are simple, like Google, and they only need a little bit of direction.

# A patron's mental model of their **question** may be inaccurate.

• They may be inexperienced with research, formulating questions, library equipment, or the organization of the library. This may cause them to ask questions in an indirect way.

- For example: a patron is looking for a specific heirloom apple species. They might ask: Where are your science books?
  - Their mental model of their question might go:
    - Libraries have books →
    - books can contain photos →
    - botany books can contain photos of different kinds apples →
    - and botany is a branch of science.
  - Each of these assumptions are correct, but together it is an inefficient question.

- The Reference Interview is the process by which the Reference Librarian translates the patron's mental model of the library and their question to determine their actual information need.
- It can be easy to unintentionally assume everyone coming to the reference desk is as experienced in asking questions and finding information as we are, which can lead to a poor interaction, or triggering anxiety (Affective barriers, Mechanical Barriers).

Helping patrons navigate their information need.

Me: I'm looking for a book about...

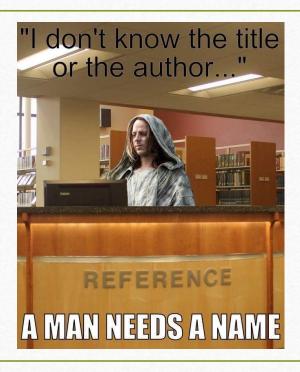
Librarian: mind reading.

Me: No.

Librarian: that will work one day



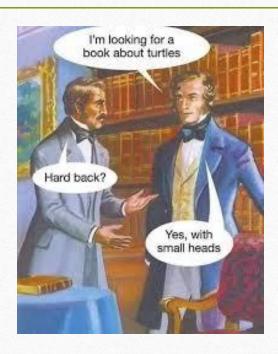
- Conducting the Reference Interview, by Ross, Nilsen, and Radford, 3rd edition.
- RUSA guidelines for Behavioral performance of Reference and Information Providers.
  - <a href="https://www.ala.org/rusa/resources/guideline



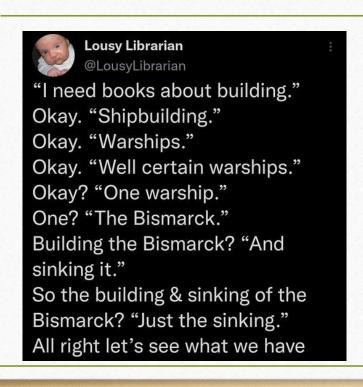
- The RUSA guidelines, briefly:
- Visibility/Approachability
  - Appear ready and willing to help
  - Acknowledge the patron with a friendly greeting.
  - Rove or wander through public areas offering assistance.

#### Interest

- Pay close attention to the patron the whole time.
- Face the patron when speaking and listening.



- Listening/Inquiring
  - Ask open-ended questions that do not have a yes/no or either/or answer that encourage patrons to expand on the request.
    - "What about \_\_\_\_\_ are you looking for?"
    - "I'm not familiar with \_\_\_\_, could you give me an example to help me understand?"
  - Ask clarifying questions to refine the search query.
    - "What kind of research have you done on this already?"
    - "Where do you think you are running into trouble?"
    - "What information would you like about this?"



- Listening/Inquiring (cont.)
  - Maintain objectivity and do not interject value judgements about the subject matter or nature of the question or transaction.
  - Verify and restate the question.
    - Rephrase the question or request to verify the question is actually understood.
    - This allows the patron to catch us in any misunderstandings, and we can backtrack to that point of confusion.



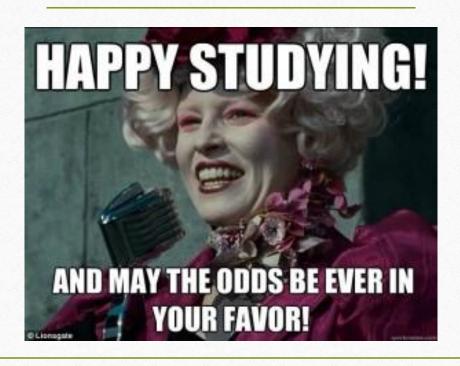
Most people don't realize this, but an important part of being a librarian is poking computer screens. #badstockphotosofmyjob #librarian



12:09 PM · Jun 23, 2020

#### Searching

- Construct and explain a search strategy to the patron.
- Give instruction in the tools you are using and searching.
- Model thinking aloud while you conduct your search.
- Instruct patrons on how to use the resource.
- Work with patrons to evaluate and narrow results, or adjust search terms.



#### Follow-up

- Check to make sure the user has found a resource that has been helpful to their information need.
- Encourage the patron to return if they have further questions.
  - "Did you find what you needed?"
  - "If you don't find what you are looking for, please come back and we can try something else."

Me, placing a book I just bought on my shelf: "I'll read you next."

Literally all my other books:



- Readers-advisory vs. Information Reference.
  - All RUSA guidelines still apply!
  - Some good open-ended questions are:
    - "Can you tell me about a book that you've read recently that you enjoyed?"
    - "What did you like about it?"
    - "What are you in the mood for?"
    - "If you found the perfect book today, what would it look like?"
  - Restate the information:
    - "You like mysteries and humorous books with a female lead and fast-paced plot, is that right?"

#### Reader's Advisory Tool

Join READS on Goodreads!

https://www.goodreads.com/group/show/1178919new-hampshire-librarians-read

This Goodreads group is run by the READS section of NHLA. It is a place where NH Librarians can share what they are reading, contribute to staff picks, and connect others with excellent books. You can follow our READS Board Members to see what we are reading and browse our bookshelves.



- Video Examples:
  - https://youtu.be/QrOdtu1UCu8
    - What did she do particularly well?
    - Did she miss any steps?
    - What did you like about her reference interview?
    - What open-ended questions did she ask?
  - <a href="https://youtu.be/pfd3wPpH1t0">https://youtu.be/pfd3wPpH1t0</a>
    - Bad Librarian: What did she do wrong?
    - Super Reference Librarian: What did she do right?
    - What open-ended questions did she ask?

How the Reference Interview is affected by changes in Libraries.

#### User Instruction

- Has become more important over time, as technology changes more and more quickly, and we can offer more tools and resources.
- It's an opportunity to make sure the patron is aware of everything we can offer them.
- Make sure you do a proper reference interview to ensure the resource you're teaching them to use is one that they actually need.

- Roving Reference
  - It's helpful to overcome a patron's perception that librarians are too busy and shouldn't be disturbed.
  - It can start an interaction with someone who otherwise wouldn't have asked for help.
  - It can be helpful for follow-up, after you've finished a first interaction, you can make sure that they have found what they need.

#### Self-Service

- Self-service stations allow experienced patrons to be self-sufficient, but it also reinforces the idea that they shouldn't bother a librarian.
- We should be aware that even if a library uses a self-service model, some patrons will always need personal assistance to help them find what they need.

#### New Technologies

- Email
- Social media such as Facebook and Twitter
- Text
- Telephone

#### Challenges

- Lack behavioral cues.
- Inaccessible to some patrons.
- Can't tell whether the patron is interested or bored or finding value in what you are offering.

- RUSA guidelines for Chat Reference
  - Use the patron's name during the reference interview.
    - Helps to form a connection from the start.
  - Focus on communicating and listening carefully.
    - Ask open-ended questions.
    - Restate the question.

- RUSA guidelines for Chat Reference (cont.)
  - Search with the patron
    - Some chat services allow screen-share.
    - Include screen-captures.
    - Or, simply copy and paste a stable URL.
      - "I'm looking at this database \_\_insert URL\_\_\_, would you like to look with me?"
      - "Have you tried \_\_\_\_, or have you already looked \_\_\_\_."

- RUSA guidelines for Chat Reference (cont.)
  - Ask whether the question was completely answered
    - Follow-up questions especially compensate for the lack of behavioral cues.
  - Ask the patron to come back if they need further assistance
    - This helps bring the conversation to a natural close. Abrupt ends can often be off-putting to patrons, who also lack behavioral cues from us.

- Tips for online communication:
  - Keep your messages brief. 1-2 sentences. And use simple, clear, jargon-free language.
  - Try to learn the approximate age of the patron early on. This will help you tailor your questions.
  - Emoticons help, but if you are unsure about usage, stick to smiley faces.
  - Provide regular, brief updates on the status of your search.

- Marketing Online resources (Visibility/Approachability)
  - Make sure it is easy to find on your website.
  - If you are unsure, survey your patrons. Ask them to find the ask for help button, or the contact us button, or the online chat button, and pay close attention to where they click on the screen and what menus they try.
  - If possible, make sure the chat button appears on every page of your website.
  - In addition to traditional marketing, (flyers, table tents, receipt memos, press releases, etc.) word-of-mouth is helpful.
    - "If you get home and you find you have another question, you can ask us by chat if we're open, or email if we are closed. Or shoot us a message on Facebook/DM us on Twitter." Etc.

# Tailoring to Different Ages and Populations

Everyone is different! Some populations deserve some additional considerations.

# Tailoring to Different Ages and Populations

- Children
- Teens
- Special Needs Adults
  - New Immigrants
  - Seniors
  - Physically Disabled Patrons
  - Developmentally Disabled Patrons
  - Homeless or Recently Incarcerated Patrons
- Consumer Health and Legal Questions

## Tailoring to different ages and populations Children

#### • Special Challenges:

- Recall memory is not fully formed.
  - They may not be able to remember every aspect of what they are looking for. Eg., they won't remember the title or author, but they will remember it was a green book about frogs.
  - They may get distracted, or ask for something tangentially related.
- Limited vocabulary
  - They may not have the words to accurately describe what they are looking for. Or they may not be able to put the words into a question.
  - They may not understand what some of the resources you are offering are until you explain them.

## Tailoring to different ages and populations Children

- Special Challenges (cont.)
  - Limited knowledge of libraries.
    - They may not know how libraries work, how books are organized, or what kind of material might be age-appropriate.
    - Most children are eager to learn! Involve them in the search process.
    - Accompany kids to the shelves. They may not know how to read a call number. Turn it into a treasure hunt!

## Tailoring to different ages and populations Children

- Tips for a Reference Interview:
  - Confirm and rephrase questions.
  - Explain what resources are when you suggest them.
  - Children do not have fully-formed mental models of the library. They might ask for things that don't exist. Focus more on open questions to see what their information need is. Ask what they know about the topic. Allow them to browse the shelves.
  - Try to match the reading level of the information material to their approximate age/grade.
  - Older children may be quite savvy with technology, so always include them when you're searching the catalog or database.
  - Be patient. Reference interviews with children can take longer than with adults.

# Tailoring to different ages and populations Children/Teens

#### Homework Reference

- The Imposed Query: An information need that is not generated by the patron. Identified by Melissa Gross (2000).
- If possible, ask for the actual assignment.
- Open-ended questions: How will this information be used? What work have you already done? Where have you already looked? What resources are you required to use?
- If the child is there with a grown-up or a friend, address the child and establish eye contact with them directly. Don't let the parent/guardian to ask the questions for the child.
- Get the child to talk about what they know, not what they don't.
- It's especially important to avoid closed questions. If given two options and they do not understand, or the options aren't helpful, they may pick one anyway to appease us (we are authority figures). At least with an open question, we can get an "I don't know".

## Tailoring to different ages and populations Teens

- YALSA Guidelines for Teen Services: https://www.ala.org/yalsa/guidelines/yacompetencies
- Special Challenges:
  - Often, they come with an Imposed Query.
  - Difficulty asking for help:
    - Feelings
    - Library Anxiety
  - Inexperience with researching, but have more challenging and involved assignments than younger children.

## Tailoring to different ages and populations Teens

- Tips for a Reference Interview:
  - Reference Interviews are important as a first impression.
    - They may never have had to ask a question at the reference desk before.
  - Get out from behind the reference desk.
    - Just like crossed arms are a defensive posture, the desk can sometimes be a similar type of barrier.
  - Sometimes teens wait until the last minute. Refrain from making judgmental comments.

## Tailoring to different ages and populations Teens

- Tips for a Reference Interview (cont.)
  - They may be embarrassed about what they are looking for.
    - Do your best to put them at ease.
  - Students will often need to narrow down their topic or area of research. It's important to narrate this process to help them become better researchers.
    - "Ok, this search didn't work, let's try this one."
    - "Oh, look, we can choose from some related subject headings in the sidebar, here."
  - Similarly, incorporate Information Literacy instruction as you assist with conducting a search.
    - "Does this website look like it could be helpful? Ok, let's check to see when it was last updated and if they're trying to sell us anything."

# Tailoring to different ages and populations New Immigrants

- Special Challenges:
  - Language Barriers
  - Different customs
    - Some cultures stress respect for figures of authority above all else, and librarians will fall into this category. If asked a direct question about how satisfied they are with the service they received, certain cultures will demand the patron say "yes" even if they were not satisfied, to allow us to 'save face'. Reframe your questions.
    - "Did you get everything you needed from those resources? Do you want to look for something else?"
  - Different interpretations of body language
    - Certain gestures can be offensive to other cultures, so try to educate yourself about the cultures of your patrons.

# Tailoring to different ages and populations New Immigrants

- Tips for the Reference Interview
  - Be respectful and aware of patrons' limitations and cultural differences.
  - Speak slowly and don't raise your voice.
  - Avoid slang or complex sentences.
  - Listen to meaning, not intonation.
  - Use Google Translate if you need to.
  - If an accent is too difficult to understand, you can ask the patron to write their question down, but keep in mind that they may not be able to write in English.

## Tailoring to different ages and populations Seniors

- Challenges:
  - Visual and auditory impairment
  - Memory issues
  - Discomfort with technology
  - Physical impairment (e.g., weakness, neuropathy in the hands or arthritis)

## Tailoring to different ages and populations Seniors

- Tips for a reference interview:
  - Don't assume any particular challenge, every Senior is different!
  - Try to be conscious of biases you might have about older people.
  - Ask if they want to learn how to use the resource. Discomfort with technology can be difficult to overcome.
  - Listen closely and show understanding, tolerance, and respect.
  - Pay close attention and observe social niceties: use slightly more formal address than you would with other patrons.

# Tailoring to different ages and populations Physically Disabled Patrons

- Challenges:
  - A number of physical or mental conditions can make communication difficult.
  - A hearing-impaired person may or may not speak in ASL.
  - A visually impaired person may need more assistance than instruction to use library equipment.
- Tips for the reference interview
  - Face the patron.
  - Ask how the patron would like help.
  - Ask the patron how they would like to communicate.
  - Never touch an assistive device without permission.

# Tailoring to different ages and populations Physically Disabled Patrons

- Tips for the reference interview (cont.)
  - Make your voice welcoming.
  - Speak directly to the patron if accompanied by an interpreter/aide.
  - Restate the question to make sure you understood correctly.
  - Write questions and answers down, on paper or in your phone's notes app.
  - Frame difficulties, "I'm sorry, the glass barriers really makes it hard for me to understand..."
  - Allow enough time for the patron to answer. Do not be tempted to finish their sentences.

## Tailoring to different ages and populations Developmentally Disabled Patrons

- Challenges:
  - May also have speech or physical impairments
  - May become confused easily
  - May be mentally similar to a child

## Tailoring to different ages and populations Developmentally Disabled Patrons

- Tips for the reference interview
  - Every 'tip' for Physically Disabled Patrons apply here, too!
  - Do not assume any level of intelligence.
  - It's especially important to speak clearly and do not rush.
  - Do not ask them to "remember" something from earlier. Simply restate the information if you need to.
  - Treat them with respect and avoid using the same tone you might with children.

## Tailoring to different ages and populations Homeless or recently incarcerated people

- Ryan Dowd: <a href="https://www.homelesstraining.com/">https://www.homelesstraining.com/</a>
- Challenges:
  - Living conditions might make personal hygiene difficult.
  - Many have physical or mental disabilities/illnesses that may not be treated.
  - They may become angry, agitated, or upset when expectations are not met.
  - They may be erratic or have memory loss due to a drug habit.
  - They may have legal questions.

## Tailoring to different ages and populations Homeless or recently incarcerated people

- Tips for the reference interview:
  - Open body language, good attending skills, and pleasant and respectful voice is especially important.
  - Do not react to unpleasant smells.
  - Use active listening and sense-making questions to determine their information need. This will help meet their expectations.
  - Do not react to rude behavior with equally rude behavior.

## Tailoring to different ages and populations Homeless or recently incarcerated people

- Tips for the reference interview (cont.)
  - Acknowledge frustration and offer strategies, not solutions.
    - "I know it's frustrating to be bounced around from one thing to another. Let's make sure that this time we get to the bottom of your question."
  - Speak quietly with angry patrons, they will usually mirror your behavior after a few turns.
  - Set boundaries when behavior crosses a line, and when that doesn't work, end the conversation. Let them know you can help then when they are able to make their request in a respectful manner.
  - Many homeless and recently incarcerated patrons have experienced trauma. Consider that something you may have said or did may have inadvertently triggered the patron's negative behavior. Apologize if appropriate.

## Tailoring to different ages and populations Consumer Health and Legal Questions

#### Challenges:

- Many people have already tried other resources before coming to the library: Family, friends, the internet.
- Users may be daunted by the scope of specialized information.
- They may want something easy to read, where none is available.
- They may want something too specific, where what they are looking for may be found elsewhere.
- They may be unfamiliar with the terminology, or how to express their information need.
- They may be embarrassed to discuss the details.

## Tailoring to different ages and populations Consumer Health and Legal Questions

- Tips for the reference interview:
  - Do not begin your interaction with a disclaimer. Focus on what you CAN help with!
  - Avoid jargon.
  - Respect a person's privacy. Walk away and let the patron research. Check in periodically.
  - Redirect when patrons begin asking for advice or interpretation.
    - "I don't know, but let's search for something that can get you started on your research..."
  - Refer patrons to services (e.g., a hospital, or a law society), but not individual practitioners.

## Tailoring to different ages and populations Consumer Health and Legal Questions

- Tips for the reference interview (cont.)
  - Brush up on subject-specific resources.
    - MLA Consumer Health Information Specialization
      - <a href="https://www.mlanet.org/page/chis">https://www.mlanet.org/page/chis</a>
    - NH State Law Librarian: Mary Searles
  - Maryland State Law Library. "Guidelines for Legal and Information Service to the Public"
    - <a href="https://mdcourts.gov/lawlib/about-us/policies/guidelines-legal-information-service-public">https://mdcourts.gov/lawlib/about-us/policies/guidelines-legal-information-service-public</a>
  - Derry Public Library. Legal Reference.
    - https://www.derrypl.org/legal-reference

### Break

Take 5, everyone!

How to fish for answers like a pro!

- The Questions Patrons can ask:
  - Simple questions: "Where can I find a review of the movie Knives Out?"
  - Complex Questions: "How can I tell if this article is peer-reviewed?"
  - Vague questions: "Can you help me find a book that is fun to read?"
  - Ill-structured/simple: "How can I get my dog certified as a therapy dog?"
  - Ill-structured/messy: "How can we ensure that homeless individuals receive the assistance they need?" (Fields, 2006)
- Reminder: You do not have to be a subject expert! You are an expert at finding information and using library resources. You are an expert at Conducting Research.

- How do we navigate an ill-formed question?
  - "Do you have books on science?"
  - Exercise: What questions could we ask to determine the patron's Information Need?

- Avoid closed questions, or questions that can be responded to with a 'yes' or 'no' answer.
  - "Is this for a school project?"
  - "Do you want print or online material?"
  - "Do you want a contact number or support group?"
  - "Do you want books on trees?"

- Useful Open Questions: Open questions get the patron talking about their information need.
  - "What kind of information would you like on this?"
  - "What requirements do you have (for the project, design, assignment, etc.)?"
  - "Where did you hear/see/read about this?"
  - "What aspect of \_\_\_\_ concerns you?"
  - "What do you mean by \_\_\_\_?"
  - Initial questions will probably get us this far: "The patron needs a book about heirloom apples"

- Useful Sense-making questions: Sense-making questions get the patron talking about the context for what the information is needed for.
  - "What are you working on?"
  - "How did this question arise?"
  - "What problem are you having with this situation?"
  - "What are you trying to understand?"
  - "What would you like to know about X?"
  - "How do you plan to use this information?"
  - "What are you trying to do in this situation?"
  - These kinds of questions would help us determine that our patron is actually interested in the differences between conventional and organic apple orchards.

### Practice

Scripted Role-Play and Breakout Groups

### Practice: Role Play

#### Pay Attention to:

- Approachability
  - Making it look like you are ready and willing to help.
- Interest
  - Paying close attention to the patron the whole time.
- Listening/Inquiring
  - Asking open-ended questions that do not have a yes/no or either/or answer.
  - Verifying and restating the question.

- Searching
  - Giving instruction in the tools you are using and searching.
  - Modeling thinking aloud while you conduct your search.
- Follow-up
  - Checking to make sure the user has found a resource they find helpful.

### Practice: Breakout Groups

- Groups of 2-3
  - Person 1 will play the reference librarian. The librarian may ONLY ask questions!
  - Person 2 will play the patron and evaluate person 1. Reads scenario information.
  - Possible person 3 will evaluate person 1.
- Please come up to get your scenarios!

### Open-Ended Questions

- What about this topic are you looking for?
- I'm not familiar with that topic, could you give me an example to help me understand?
- What do you mean by that?
- What kind of research have you done on this already?
- Where do you think you are running into trouble?
- What kind of information would you like about this?
- What do you want to know about that topic?
- What are you in the mood to read?

- What did you like about the last book you read?
- What are you working on?
- What kind of requirements do you have for this?
- How will you be using this information?
- What aspects of that are you interested in?
- Where did you see/read/hear about this?

### Wrap-up

- Continuing after this workshop:
  - Make a commitment to changing your behavior.
  - Start immediately!
  - Practice one skill at a time and add new skills as they become habits.
  - Learn from missed opportunities.
  - Develop your own style.
  - Communication accidents WILL happen!
  - Observe others.
  - Teach someone else.

## Wrap-up

• Questions?

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#### Thank you!

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