**Evidence Based Library and Information Practice**

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*Evidence Summary*

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**Abstract**

**Objective** – To evaluate the effectiveness of a reference training program for graduate student employees that seeks to encourage use of reference interview and instruction techniques in virtual and in-person reference interactions.

**Design** – Naturalistic observation with qualitative content analysis.

**Setting** – A large, public research university in Montreal, Canada.

**Subjects** – Three graduate students in Library and Information Science employed by the university library to provide virtual and in-person reference services.

**Methods** – After completing a training program, the three participants provided virtual and in-person reference training for two consecutive semesters. They self-recorded their desk interactions in a Google form. These self-reports, along with their online chat transcripts from QuestionPoint, were the subject of this study's analysis. Focusing on the QuestionPoint data, the authors coded the transcripts from these participants' online reference interactions to reflect the presence or

absence of a reference interview and various instructional techniques in their responses to patrons. Also, all in-person and virtual questions were examined and categorized as being either transactional or reference questions. Reference questions were further categorized as *basic, intermediate*, or *advanced* questions.

**Main Results** – Of the chat transcripts analyzed, 49% were classified as containing reference questions rather than transactional questions. At the desk, 21.9% of interactions were coded as reference questions. Taking the two semesters together, 232 of 282 virtual reference questions were considered *basic*, while 41 were labelled *intermediate,* and 9 classified as *advanced*. Similarly, of 136 desk reference questions, 120 were classified as basic, 14 as intermediate, and 2 as advanced. In their coding of chat transcripts, researchers indicated whether the interaction contained no reference interview, a partial reference interview, or a complete reference interview. Virtual chat transcripts from both fall and winter semesters showed that no reference interview took place in 77.3% of interactions. Authors noted evidence of partial reference interviews in 19.3% of fall transcripts and 21.5% of winter transcripts. Complete reference interviews took place in 3.4% of fall and 1.2% of winter transcripts. Additionally, authors found that 65.5% of chat transcripts contained elements of instruction, with *Modelling* and *Resource Suggestion* being the most prevalent forms.

**Conclusion** – Because the graduate students used complete or partial reference interviews in a small number of their virtual reference questions, the authors of this study determined that more emphasis ought to be placed on reference interviews, particularly virtual reference interactions, in future training programs. Graduate students employed instructional strategies in observed virtual reference interactions, a promising trend.

**Commentary**

Over the past several years, a number of studies have considered how best to train students to provide online and in-person reference services. A University of Michigan paper described an online and in-person hybrid training process (Wetli, 2019). Librarians at another Canadian university completed a content analysis of online chat transcripts and patron surveys to determine the quality of student reference interactions (Barrett & Greenberg, 2018). In one study, researchers compared the quality of chat transcripts with student employees to those with librarians (Lux & Rich, 2016). This study uses a similar content analysis methodology.

This summary uses ReLIANT, a tool designed to aid librarians in appraising evaluations of education and training programs in four areas: Design, Educational Context, Results, and Relevance (Koufogiannakis et al., 2006).

Regarding educational context, it is unclear what prior relevant experience the three study participants brought to their roles, but it is clear what setting they are working in and that they received a mix of in-person instruction and observation hours with practicing librarians during the training program. In terms of results, the data do accurately show that the participants used reference interview and instructional tactics after training, if only for online interactions. While the authors based their coding techniques on previously published research and drew specifically from RUSA and a 2008 study by Desai and Graves to inform their methodology, they did not specify whether they completed coding separately or together and, if the former, what level of overlap they achieved. This could influence the accuracy of the research design. Adding such details together with comparison data, such as an analysis of librarian chat responses or questions participants answered before completing training, would have added richness to the analysis by offering a comparative framework for determining the significance of the data.

Regarding relevance, the authors' findings are interpretive and might not apply to all settings. They see a need to include greater emphasis on reference interview skills in future training, despite offering several reasons why a

reference interview might not be appropriate for every question. They note briefly that some questions, such as known-item searches, may reasonably be answered without using reference interview techniques, but do not share how many interactions with advanced questions, for example, included partial or complete reference interviews, as compared to basic questions. Future studies could incorporate and elaborate upon these topics.

As the authors note, libraries at colleges and universities with LIS programs do commonly employ graduate students to provide reference services. Thus, this study may offer librarians at such institutions ideas for improving their own training programs. More broadly, the training content pertaining to reference interviews and instructional techniques may be useful for training librarians who are recent graduates or have minimal reference experience, especially in online environments. The content analysis methodology is valuable to other researchers examining trends in reference services.

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