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The "Genius" of Reference Service: A Threefold Framework as a Simple Assessment Tool

Paul Hartog

Faith Baptist Bible College and Theological Seminary, hartogp@faith.edu

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The "Genius" of Reference Service: A Threefold Framework as a Simple Assessment Tool

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Paul A. Hartog, Professor and Director of Library Services
Faith Baptist Bible College and Theological Seminary

ABSTRACT

This essay begins with a narrative comparison of several reference interviews, both face-to-face and virtual. The chosen reference query concerned the meaning and significance of the "genius" of the Roman emperor. Using three connotations of the word *genius* as a launching point, the article discusses the importance of rapid response, expert knowledge, and guiding instruction within reference services. The essay concludes by using this threefold framework to construct a simple assessment tool that could spur on further reflection and conversation concerning the "ideal" reference interaction. This memorable triangulation may be of special interest to those training new reference staff members.

Introduction

Like many other words, the word *genius* takes on divergent meanings in differing contexts. The word is related to the Anglicized *genie* (related to the Arabic *jinni*), conjuring up images of a wispy spirit escaping from a magical lamp. One perhaps imagines a Robin Williams–like voice servilely declaring, "Your wish is my command." But behind the English word *genie* stands the French *genie*, which in turn is based upon the Latin *genius*. In the Roman era, a *genius* was a guiding or guardian spirit. According to the *Oxford English Dictionary* (*OED*)*,* this classical use of *genius* referred to a "tutelary" or "attendant" spirit that governed one's fortunes (*Oxford English Dictionary [OED]*, n.d., "genius, *n.*, 1"). Among the other definitions of *genius* in the *OED* is "native intellectual power of an exalted type," often referring to "instinctive and extraordinary capacity for imaginative creation, original thought, invention, or discovery" (*OED*, n.d., "genius, *n.*, 5). This third meaning is probably the most common usage of the word *genius* today (i.e., an individual having a high IQ).

The purpose of this essay is to investigate the "genius" of exceptional reference service, eventually landing upon a simple yet hopefully helpful assessment tool.[1]

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1 This essay will focus upon reference questions that require more research consultation than simple ready reference, directional, or similar queries (see Smith & Wong, 2016, p. 219).

Does excellence in reference service require promptly fulfilling the patron's wish for information (a wish-fulfiller at the patron's bidding), exhibiting extraordinary intellectual power (a knowledgeable expert as an information resource), or serving as a tutelary attendant (a spirit of guiding instruction)? Or should reference best practices include all of the above, held in some type of ideal balance between rapid response, expert knowledge, and guiding instruction (cf. Ross & Dewdney, 1994)?

During the week of August 7-13, 2016, I did some "mystery shopping" of reference services (cf. Kocevar-Weidinger, Benjes-Small, Ackernmann, & Kinman, 2010; Hammill & Fojo, 2013; Crowe & Bradshaw, 2016), armed with the following reference question: "What was the *genius* of the Roman emperor?" This was not a deceptive or unethical query of mere fabrication (cf. Bivens-Tatum, 2012). I had just reviewed Bruce Winter's *Divine Honours for the Caesars* (2015) for an academic journal, and Winter had repeatedly mentioned the imperial genius without ever providing a definition of the concept to my satisfaction.[2] So I set out to find a satisfactory description through some library reference queries. My summaries of the initial three reference interviews are found on the next two pages. I will later use two further interviews to illustrate two additional aspects of reference work, thereby underscoring the multifaceted nature of excellent reference service (cf. Nilsen & Ross, 2006, pp. 66, 69, 74).

Rapid Response

I tried two virtual reference services, one associated with a consortium of Florida public libraries and the other connected with a consortium of academic libraries in Wisconsin. I entered the Florida site (https://askalibrarian.org/), provided the context of reading Winter's book, and submitted my question concerning the imperial genius. A librarian joined me and identified herself as "Rhonda from North Florida."[3] She immediately sent me to https://www.britannica.com/topic/genius-Roman-religion, the "Genius (Roman Religion)" article in the *Encyclopædia Britannica*. The article's introductory explanation defined a genius as "in classical Roman times, an attendant spirit of a person or place." I thanked Rhonda but remarked that the webpage "won't let me read the whole article, although it has a good summary." She replied, "If you need more specific resources, we can see if your library has books on the topic." I asked her how to cite the *Encyclopædia Britannica*, and she told me to check the "cite link" at the top of the page. As the interview

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2 Hartog, P. (2016) Review of *Divine Honours for the Caesars* by Bruce Winter. *Journal of the Evangelical Theological Society* 59, 841-843.

3 Throughout this essay, the names of all the library workers have been changed in order to retain their anonymity. I do, of course, have access to the transcripts of the virtual reference interviews. The descriptions of the face-to-face interviews may not always provide a word-for-word replication, but they do faithfully reflect the sessions as captured by memory and research notes.

wrapped up, Rhonda concluded, "Thanks for visiting! Good night." The session lasted eight minutes from the time I entered the chatroom, and one might describe the interview as a rapid response powered by Google.[4]

When I asked the virtual reference chatroom of a large, Midwestern university system (http://uwm.edu/libraries/ask/), "Librarian Keith" joined me and identified himself. He gave http://www.classics.upenn.edu/myth/php/tools/dictionary.php as a hyperlink and reasoned, "It [a genius] looks like it is something similar to a spirit or essence that is with the person from birth to death." He then asked an open-ended question: "What kind of source do you require?" He called the hyperlink "a quick source of information" and recommended that I look through my library's databases for more encyclopedic items. Librarian Keith cordially concluded, "Bye! I hope the session was helpful and that you'll use us again soon! You will receive a transcript of this session shortly. You may also see a link to a survey, which you may use to rate this service. Thanks!" This chat session lasted eight minutes, and the reference interview could also be categorized as a Google-powered rapid response.[5]

My first face-to-face (F2F) session was at a local, public library. I explained my query to "Sue" (a librarian assistant) who warmly greeted me at the desk. Her fingers began to flutter on the keyboard, but because I stood on the other side of the reference desk, I could not see her computer screen. Sue landed upon https://www.jstor.org/stable/3141986?seq=1#page_scan_tab_contents (an online article first published in 1912). She read aloud from two pages of the journal article (frankly, too much of an information download to retain by mere hearing alone). Sue then helpfully offered to print off the two relevant pages, and I concurred with this suggestion. The interview lasted around six minutes. I subsequently asked a few further questions, discovering that Sue had Googled her search as well. This F2F interview could also be classified as a Google-powered rapid response.

Assessment

These three interviews were similar in length, method, and result. All three were rapid responses that lasted between six and eight minutes, all three were powered by a Google search, and all three left me with one key source from the list of hits. The three reference interviewers sought to find quick and simple yet satisfying answers, targeting prompt fulfillment of the patron's wish (Nilsen & Ross, 2006, p. 53). All three interviewers greeted the user, found a reliable source, named or cited the source, and ended the session with an appropriate closing and "satisfaction check" (cf. the rubrics in Burger, Park, & Li, 2010, p. 218; Maidenberg & Thomas,

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4 This *Encyclopædia Britannica* article comes up as the third hit in Googling "genius Roman emperor."

5 This http://www.classics.upenn.edu source comes up as the fifth hit in Googling "genius Roman emperor."

2016, p. 6). But in other ways, these prompt responses partially faltered, in that they all provided only one source (contra Bunge, 1999, p. 127), and none of them voluntarily explained the search method employed (contra the rubric in Burger, Park, & Li, 2010, p. 218).

Are there lessons to be learned? The assessment of reference services is critical for quality and improvement (Whitlatch, 2000; Diamond & Sanders, 2006; Novotny, 2006; Reference and User Services Association [RUSA], 2008). These three interviewers generally followed the standard guidelines of the Reference and User Services Association (RUSA) structured in five categories: (1) Visibility/Approachability; (2) Interest; (3) Listening/Inquiring; (4) Searching; and (5) General (RUSA, 2011; Mannes, Naper & Chaudhuri, 2009). Cassidy, Colmenares, and Martinez (2014, pp. 310–312) have developed a similar rubric, as have Maidenberg and Thomas (2016, p. 6; cf. Kocevar–Weidinger, et al., 2010). I have merged their assessment categories into the four classifications below.

Approachable and interested tenor: All three reference workers exhibited visibility and approachability whether in the physical or virtual environment. All of them were supportive and encouraging (cf. Rogue Community College [RCC], 2015, p. 1). All three reference services posted their hours of availability on the web or on physical signage, as appropriate, and initiated the conversation with a friendly greeting (RUSA, 2011, 1.1.1, 1.1.3). Both virtual librarians identified themselves (Dewdney, 1994) and avoided prolonged silences (Maidenberg & Thomas, 2016, p. 6). The F2F library assistant made initial eye contact (RUSA, 2011, 1.2.2). Nevertheless, the F2F worker did turn her back away from me early on, causing me to voluntarily come around to her side of the reference center, even though she did not suggest this herself (cf. RUSA, 2011, 2.2.1). The virtual librarians maintained regular online contact by splicing up their responses into smaller paragraphs (RUSA, 2011, 2.3.2). If they expected some lag time, they assured me that a response was forthcoming (RUSA, 2011, 2.3.2).

Listening and inquiring skills: All three allowed me to form my query in my own words (RUSA, 2011, 3.1.3). The F2F worker asked to see the physical copy of Winter's book. After hyperlinking a source, the academic virtual librarian inquired, "Does that help illuminate it?" All three could have improved the interview by asking what I had already found in my own research. The academic virtual librarian additionally asked, "What kind of source do you require?" In sum, only one of the interviewers (the academic virtual librarian) used clarifying questions, and all three interviewers did little to collaborate with the user in refinement and evaluation of the results (contra the rubric in Maidenberg & Thomas, 2016, p. 6).

Searching methods: None of the reference workers negotiated my initial query or asked me to paraphrase or re-word it (cf. Cassell & Hiremath, 2013). All three staff

members apparently Googled their searches based upon my original wording. Both virtual librarians recommended that I also look into library collections. The public virtual librarian even volunteered to help me find collection materials in a local library near me. When asked, she described how the source she discovered could be cited in research. Curiously (and disappointingly), the academic virtual librarian did not respond to my direct inquiry concerning proper citation.

General traits and follow-up: In line with RUSA 4.1.10, 5.1.1, and 5.1.2 (2011), all three interviewers asked if there was anything else with which they could assist ("Is there anything else I can help you with right now?" "What else can I help you with this evening?"). The university virtual librarian emailed a chat transcript. And thankfully no one ever compromised my security or privacy (cf. https://info. askalibrarian.org/about/privacy/ and http://uwm.edu/libraries/about/privacy/). One notes how these first three reference interchanges (two virtual and one F2F) were similar in length, tenor, and result. A "perceived need to respond quickly" is especially keen in the virtual environment (Nilsen & Ross, 2006, p. 53). I was generally satisfied, but I felt more could have been done. In particular, I was left pondering if F2F sessions could take more advantage of the possibilities available in the F2F environment. As a general critique, one notes that all of the reference responses described above were powered by a simple Google search, causing one to wonder how such library services expect to differentiate themselves from Google searches (which patrons themselves can easily do). In a competitive information environment, reference librarians need to make a case for their existence, and merely using a basic Google search may not meet the bar.

Expert Knowledge

My two other reference interviews highlight further facets of exceptional reference work. Therefore, I will incorporate insights from those additional reference sessions as illustrations in the following two sections of this essay. The discussions will not be descriptive alone, but will provide prescriptive recommendations. In particular, genius reference interchanges find the "sweet spot" of a perfect balance between rapid response, expert knowledge, and helpful guidance. Such exceptional interviews require both effort and expertise.

The expert reference librarian must find quick answers, but never at the expense of comprehensive reliability. The adept librarian must be thoroughly familiar with the library's materials and services (RCC, 2015, p. 1), and the information that she or he dispenses must be both accurate and complete (Berkeley City College Library, 2012, p. 31). Reference expertise may involve the creative application of search capabilities and databases (RCC, 2015, p. 1). Sometimes the exceptional reference interview may entail referral to an expert or consultation with a peer (RCC, 2015, p. 1). RUSA 4.1.9 (2011) states that the successful reference librarian "recognizes

when to refer patrons for more help. This might mean a referral to a subject librarian, specialized librarian, or community resource." And 5.1.3 (2011) states that he or she "consults with other librarians or experts in the field when additional subject expertise is needed." Comprehensive answers may require technological savvy or professional collaboration, even an expert "meeting of the minds."

This important facet of expert knowledge can be illustrated by my reference interview that took place at a large state university (one with a classical studies major, befitting the Roman genius inquiry). A dual screen system anchored the Research and Instruction Services desk, with one screen facing the staff member and the other screen facing the patron. A librarian assistant, identified as "Miguel" by his name badge, greeted me. He asked to see my copy of the Winter volume, and he searched for a glossary in the back (there was none). Miguel returned my book, and then I watched as he Googled "Latin genius." So far, Miguel had acted much like Sue above (the reference assistant in the public library). Miguel seemed disappointed with the search results, however, and he entered live chat mode with his fellow staff members: "Someone is seeking what genius meant when attached to the Roman emperors. The word is not being used in the normal way. Any ideas?" The F2F reference interview was morphing into an electronic session.

Soon "Lauren," a subject librarian at the university, joined the electronic chat. She replied that the *Oxford English Dictionary* included a classical usage of genius, a definition related to the Roman era. This was the first assistance I had received that was not dependent upon a Google search. A third librarian then joined the e-conversation, directing us to the copy of the *OED* in the adjoining reference short stacks. Miguel then recommended that I simply access the electronic version of *OED*, which was available at every reference work station. Using the dual screen capability, he showed me how to find the online subscription of the *OED* (although he did not bring up the genius entry in particular). By the time I strolled to a computer, found the *OED*, and copied the relevant material, about ten minutes had transpired.

Guiding Instruction

Besides a rapid-response wish-fulfiller and besides a knowledgeable expert, the word *genius* may also refer to "a guiding spirit of tutelage." RUSA 4.2.1 (2011) fittingly states that the skilled reference librarian "accompanies the patron in the search (at least in the initial stages of the search process) unless the patron prefers to conduct the search him/herself." Like a genius (a guiding spirit of tutelage) who instructs even as it accompanies, the reference librarian must sometimes personally accompany the patron. The librarian seizes the "teachable moment" for pedagogical profit (Avery, 2008). As a helpful guide, the reference librarian instructs via showing as well as sharing. He or she not only asserts but also accompanies.

This important facet of reference work can be illustrated by my final reference interview, occurring within the context of a medium-sized, regional, private university. "Bri" greeted me with a warm smile and attentively listened to my query, asking to take a peek at Winter's book. Bri then lowered the desk and computer screen, sat down, and beckoned me to pull up a chair beside her. An initial internet search led to the *Encyclopædia Britannica* article cited above ("Genius: Roman Religion"). Not content with the cropped article, however, Bri returned to the search results. She opened up the Wikipedia hit, informing me that Wikipedia itself was not recommended as a source but one could still examine its footnote references, which might sometimes lead to more reliable and authoritative materials. She had donned her "instructor of information literacy" hat.

Having thereby gathered the new search phrase of *Genius Augusti*, Bri veered toward Latin reference sources in the university's online catalog. "I'll accompany you to the reference stacks," she announced. She pulled a few sources off the bookshelf, literally sat down on the ground next to me (between the stacks), and explored the resources. Discovering that I had never used the university's scanner before, she volunteered to accompany me again, toting along some of the discovered materials. Bri coached me through the scanning process and then parted ways after being assured that I could take the research process from there. I was impressed with her personal commitment of nearly nineteen minutes (cf. Fitzpatrick, Moore & Lang, 2008, p. 235).

The Balanced Sweet Spot of Reference

Using these descriptive narratives, I have tried to make the prescriptive case that an expert reference interaction (a transaction characterized by genius) should involve rapid response, expert knowledge, and helpful guidance. The perfect balance within this triangulated tension is relative, of course, varying from case to case. Each individual scenario reflects its own "situatedness" (Miwa, 2003), and thus carries its own peculiar demands. In some instances, quick timing is of the utmost importance. In other circumstances, the patron needs and desires in-depth instruction. A reference librarian must neither cut an interview short nor spend an overt amount of time with one patron (RCC, 2015, p. 1). Although each particular situation is unique, a simple triangular chart may visualize the sweet spot of a balanced reference interview:

RAPID RESPONSE

EXPERT
KNOWLEDGE

HELPFUL
GUIDANCE
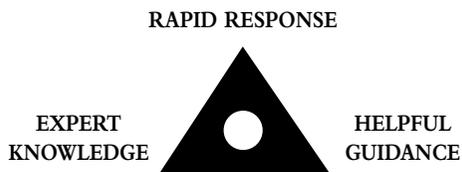
For example, one could target rapidity of response to such a degree that one sacrifices *both* appropriate guidance and expert knowledge (comprehensive and reliable information), visualized in this manner:

RAPID RESPONSE

EXPERT KNOWLEDGE   **HELPFUL GUIDANCE**

Alternatively, one could seek to provide accurate and complete information (expert knowledge) in a rapid fashion, to the detriment of helpful guidance appropriate to the teachable moment, visualized thus:

RAPID RESPONSE

EXPERT KNOWLEDGE   **HELPFUL GUIDANCE**
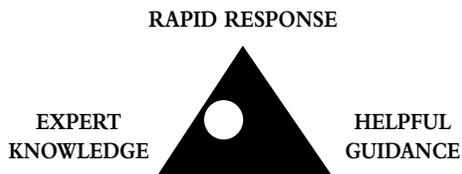
While I was generally satisfied with the rapid response of the firsts three interviews, I was more satisfied with the additional input from peer collaboration (the F2F/chatroom case in the large, state university), and perhaps most satisfied with the committed personal guidance (in the regional, private university). The sweet spot of reference services should balance all three facets of the work of a genius.

Conclusion

Exceptional reference service seeks a satisfying three-pronged balance (swift efficiency, factual accuracy, and instructional utility), what one may call the sweet spot appropriate to the particular situation (cf. Richardson, 2002, pp. 41-42). The genius of this approach balances the reference librarian as prompt achiever, gifted expert, and attending tutor. Furthermore, such genius reference service serves as an *apologia pro labore* of reference librarians and paraprofessionals. If a staff member merely types some key words into a Google search box, he or she has not made a convincing case for the continued employment of reference workers.

A comprehensive evaluation of reference services should involve multiple qualitative tools such as surveys, questionnaires, rubrics, unobtrusive observations, hierarchical linear models, and other reference transaction assessment instruments (Westbrook, 1990; Smith, 1991; Whitlatch, 1992; American Library Association, 1995; Bunge, 1999; Kuruppu, 2007). Nevertheless, "No single tool can serve all purposes" (Hubbertz, 2005, p. 333). Perhaps even a simple, triangular chart may cause us to

reflect upon the reference sweet spot in a basic yet constructive manner. In particular, such a simple tool may prove memorable and therefore effective while coaching new reference workers. For those training reference staff, this visualization of a targeted balance may even turn out to be a stroke of pure genius.[6] ☩

ABOUT THE AUTHOR

Paul Hartog is a Professor and the Director of Library Services at the John L. Patten Library of Faith Baptist Bible College and Theological Seminary in Ankeny, Iowa. He can be contacted at hartogp@faith.edu.

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6 I wish to thank Dr. Alexandra Dimitroff for her encouragement in the composition of this essay. In appreciation, I dedicate this article to her upon her retirement from the University of Wisconsin-Milwaukee School of Information Science.

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