PRACTITIONER EXERIENCES IN ACADEMIC RESEARCH LIBRARIES: AN
INTERPRETATIVE PHENOMENOLOGICAL ANALYSIS OF REFERENCE WORK

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ABSTRACT

AMY VANSCOY: Practitioner Experiences in Academic Research Libraries: An
Interpretative Phenomenological Analysis of Reference Work
(Under the direction of Barbara B. Moran)

This study explores the phenomenon of reference work from the perspective of

practitioners. The objectives are to analyze in-depth the attitudes, values, beliefs, stories,

and thoughts of a group of academic reference librarians working in the research library

context; to identify commonalities and diversity of experience among the participants;

and to relate these experiences to the intellectual traditions that have been explored in the

literature.

Reference work is often studied and taught as a series of behaviors. Standards for

reference work, such as the *RUSA Guidelines for Behavioral Performance of Reference

and Information Service Providers*, and evaluation studies tend to focus on specific

behaviors. While the behaviors that constitute reference work are important to examine,

understand and assess, they do not account for a complete understanding of the

phenomenon. The concept of reference work as understood by practicing reference

librarians is also an important dimension. In other professions, such as teaching,

counseling, nursing, and social work, decades of research on practitioner beliefs have

contributed to a rich understanding of how professionals approach their work. This

understanding has been used to improve professional education and continuing education.

Using interpretative phenomenological analysis (IPA), a method fairly new to library and information science (LIS), the study interprets the experience of reference work for eight academic research librarians. Data were collected using semi-structured interviews and analyzed following the multi-stage IPA analysis process. Five themes emerged from the data to express the experience of reference work for this group: importance of the user, variety and uncertainty, fully engaged practice, sensations of reference work, and sense of self as reference professional.

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ABBREVIATIONS

ARL   Association of Research Libraries

IPA   Interpretative phenomenological analysis

LIS   Library and information science

RUSA   Reference and User Services Association

CHAPTER 1:

INTRODUCTION

Overview

This study is an exploration of the experience of reference work from the perspective of academic reference librarians working in research libraries. Reference work has generally been studied from a behavioral perspective, focusing on what librarians do, but little research has examined the practitioner perspective, including the thoughts and feelings of those who practice reference work. This in-depth, phenomenological study seeks to understand and articulate the experience of reference work from the practitioner perspective. As the first step in a broader research plan, this study focuses specifically on the experience of reference work for a small group of academic reference librarians in research libraries.

Problem Statement

Reference work is often studied and taught as a series of behaviors. Standards for reference work, such as the *RUSA Guidelines for Behavioral Performance of Reference and Information Service Providers*, and evaluation studies tend to focus on specific behaviors. While the behaviors that constitute reference work are important to examine, understand, and assess, they do not account for a complete understanding of the phenomenon. The concept of reference work as understood by practicing reference librarians is also an important dimension of reference work. Some scholars have

discussed the importance of the librarian's thoughts, beliefs, values, and attitudes (e.g., Bunge, 1999). A few studies have touched on this perspective: Borman and McKenzie (2005), Bronstein (2011), Burns and Bossaller (in press), Duff and Fox (2006), Gerlich, (2006), and Watson-Boone (1998). These studies have yielded interesting results and demonstrated the potential for research in this area. However, the studies have not been built on by other, and thus have not coalesced into a clear and convincing interpretation of reference work from the practitioner perspective. There is a need to provide more structure for studying this perspective and to synthesize the research into a cohesive framework.

A related issue is the conflicting and incomplete literature on the intellectual traditions of reference work. This literature emphasizes instruction and information delivery, but interpersonal dimensions, guidance, counseling, and partnerships are also noted. There is a need to understand how these various traditions manifest themselves in practice and how they interrelate.

Investigating the beliefs, values, attitudes, and experiences of reference librarians contributes a new perspective, the voice of the librarian, to the understanding of reference work. It also contributes to a better understanding of the intellectual traditions of reference work by showing whether and how these traditions manifest themselves in the perspective of a specific group. Thus, a phenomenological study of reference librarians is a useful contribution to an understanding of reference work.

Significance

This study of the experience of reference work is significant for its contribution to a basic understanding of reference work and to improving practice and professional

education. To date, theories of reference work have been based primarily on the behaviors that constitute the work. A new and complementary perspective would be theory derived from the experience of reference work, including intentions of practitioners and their affective and cognitive experiences. Other professions have used the practitioner perspective to achieve a different understanding of professional work that has been useful for improving practice and professional education. This study will contribute to this complementary understanding by examining how practitioners experience reference work. The individual experiences, as well as the common themes, will contribute a new perspective and may shed new light on the debate in the literature about the meaning and purpose of reference work. Expanding the theoretical discussion on reference work to include practitioner voices may lead to the discovery of new perspectives that have not been addressed. It may provide a framework for reference work that would resonate with practitioners and provide a practical theory to guide their work.

The study also has potential to improve practice. Encouraging reference librarians to examine and articulate their thoughts and beliefs about their work may help to develop a broader culture of reflective practice. Research that articulates and describes the various conceptualizations of reference work would provide a structure and language for communication among practitioners and scholars. While this study does not attempt to articulate the experience of reference work for all librarians, it articulates the experience of a small group, and thus offers an important first step toward this goal. Articulation of the experience of reference work for practitioners would also allow administrators and

managers to understand the challenges and sources of satisfaction for professionals performing this work.

Finally, this research can inform professional education for reference work – providing a framework for instruction, as well as stories and examples that describe the lived experience of the work. Reflecting on one's own beliefs about the meaning of work is important for reflective practice, and the results of this study would provide important examples of what practicing reference librarians think about the work they do.

Definitions

The term "reference work" in this study refers to librarians' interactions with users, including both in-person and online interactions. "Reference work" is sometimes used to describe the myriad job duties of a reference librarian, including collection development, formal instruction, and outreach, but this study will not use the term in this broad sense.

"Academic reference librarians" refers to librarians who have reference work as a significant component of their position responsibilities and work in a higher education environment. Characteristics of this group distinguish them from reference librarians in other environments. They may identify with the academic community in which they work, and they may be required to meet faculty standards for promotion and tenure, for example. In personality studies, academic reference librarians were found to have distinct personality characteristics (Sherdin, 1994; Williamson, Pemberton, & Lounsbury, 2008).

This study is focused on academic reference librarians working in the "research library" context. Research libraries are generally considered to be large and relatively well funded and to serve scholars with demanding research needs. For the purposes of

this study, a "research library" is defined as a library member of the Association of Research Libraries. The Association of Research Libraries has detailed membership criteria including collection size, depth and breadth; type and variety of services; extensive and innovative use of technology; and contributions to the scholarly community and to resource sharing among libraries. Member libraries must also be affiliated with universities that rank as high or very high in the Carnegie Classification of Research Universities (Association of Research Libraries, 2012).

Aim and Research Question

The aim of the study is to present the experience of reference work from the practitioner perspective, focusing specifically on a small group of academic research librarians. Little is known about this experience, so the study will broaden and deepen our knowledge. The guiding research question for this study is *What is the experience of reference work for librarians in academic research libraries?* The objectives for this study are to analyze in-depth the attitudes, values, beliefs, stories, and thoughts of a group of academic reference librarians working in the research library context; to identify commonalities and diversity of experience among the participants; and to relate these experiences to the intellectual traditions that have been explored in the literature. This research question is explored using the rigorous procedures of interpretative phenomenological analysis.

Summary

This introduction has identified a gap in our knowledge of reference work and argued the need for examining reference work from the practitioner perspective. Chapter 2 demonstrates the value of examining professional work from the practitioner

perspective by reviewing the extensive research on this topic in other professions. It also presents the isolated yet interesting research that has been conducted to date on reference work from the practitioner perspective and explicates the intellectual traditions of the purpose of reference work. Chapter 3 describes the methodology used to examine practitioner experience, interpretative phenomenological analysis. It also details study procedures and explains how validity and quality was ensured. Chapter 4 presents the five themes of the experience of reference work that emerged from the data. Chapter 5 discusses these themes in relation to existing research and theory and the implications of the findings for theory development, practice, and professional education.

CHAPTER 2

RELEVANT RESEARCH

The Practitioner Perspective in Other Profession

Little is known about the practitioner perspective on reference work, but in other professions, particularly teaching, nursing, counseling, and social work, studying work from this perspective has resulted in better understanding of practice, a clearer picture of expert versus novice thinking, and how environmental constraints prevent behaviors from reflecting thinking. These findings have been used to improve professional education and professional development for practitioners in these fields. This section reviews research on the practitioner perspective in other professions to demonstrate how these studies have increased knowledge about professional work and how this knowledge can be applied to improve practice.

The concept under study in this research has been referred to in various ways in the literature of other professions. This concept has been called practitioner beliefs, personal theories of practice, practical knowledge, implicit theory, espoused theory, and tacit knowledge, among other terms. As Pajares (1992) points out, terms cannot even be agreed upon, creating a scattered body of research (p. 309). Pajares concludes his discussion of terms by advocating for the term *practitioner beliefs*.

For the most part, study of practitioner beliefs uses an interpretive paradigm. Researchers recognize that each teacher's, nurse's or counselor's experience will be unique in some way. This approach values the experience of the individual and the

diversity of perspectives that exist. Some studies have a more positivist approach. The positivist perspective that an objective reality can be studied allows for characterization of groups of practitioners and may be more useful in application of research. "Orientations" tends to be a term used by researchers developing instruments to study beliefs of larger groups of practitioners (Coleman, 2004, 2007; Ennis & Hooper, 1988; Ennis & Zhu, 1991). Both paradigms have their merits in understanding practitioner beliefs.

Findings of studies on practitioner beliefs.

The findings of studies of practitioner beliefs are diverse. There is little consistency in how practitioner beliefs are reported. Lack of comparable results seems reasonable since most of the research is qualitative and exploratory in nature. However, after decades of research in this area, more consistency would improve the body of research overall. When there are similarities in how beliefs are handled, the results can be an enlightening comparison across studies, such as Samuelowicz and Bain's (2001) work on teaching versus learning orientations.

Conceptualizations of work, termed "rules of practice" or "practical principles" have been developed by Cole (1990), Cook, Gilmer, and Bess (2003), Cornett, Yeotis, and Terwilliger (1990), Feldman (2000), Kettle and Sellars (1996), and Levin and He (2003). Some researchers have developed models of practitioner beliefs based on the research, such as Pinnegar and Carter (1990) and Radwin (1995). Others have created typologies (Berman-Rossi, 1988; Copeland & D'Emilio-Caston, 1998; Freire, Chorao, & Sanches, 1992; Gess-Newsome, Southerland, Johnston, & Woodbury, 2003; Samuelwicz & Bain, 2001). Rich description of practitioners' conceptualizations of their work has

been generated by studies of practitioners' metaphors (Clandinin, 1985; Cole, 1990; Elbaz, 1981; Kettle & Sellars, 1996; Marshall, 1990; Munby & Russell, 1990; Poulou, 2003). This vein of research tends to focus on qualitative, interpretivist methodologies and emphasizes giving voice to practitioners' beliefs.

In professions where theories of practice are well established, such as counseling and social work, researchers have been able to use fixed response instruments to gather data about practitioner beliefs (Coleman, 2004; Coleman, 2007; Ennis & Hooper, 1988; Ennis & Zhu, 1991; Finch, Mattson, & Moore, 1992; Worthington & Dillon, 2003). These studies categorize respondents' beliefs and make predictions about the group as a whole.

Although the beliefs of individual practitioners are in and of themselves quite interesting, research on this topic also reveals a number of interesting trends surrounding practitioner beliefs. Trends in development from novice to expert and the causes of change in beliefs, sources of beliefs, the relationship between beliefs and behaviors, and the general difficulty of eliciting them are major trends in this research.

A number of researchers have looked at changes in conceptualization of work as practitioners gain experience (Fox, 1983; Kagan & Tippins, 1991; Salmon, 1993; Samuelowicz & Bain, 2001). Developmental trends include a shift from an emphasis on teaching to an emphasis on student learning or a shift from providing solutions to gathering information. Some researchers have focused on the causes of change in practitioner beliefs (Beach & Pearson, 1998; Feldman, 2000; Gess-Newsome, Southerland, Johnston, & Woodbury, 2003).

Another trend in the research focuses on sources of practitioner beliefs. Some of the sources identified include personal history, professional education, work and internship experiences, and observation of others doing the work (Andersson, 1993; Gallagher, 2007; Kettle & Sellars, 1996; Levin & He, 2003; Spouse, 2000). Professional education was not always found to be a significant source for development practitioner beliefs.

Some research has focused on the relationship of practitioner beliefs to behavior. Many researchers have tried to show a causal relationship because of the pressure, especially in education, to show that research is tied to specific classroom outcomes. Some studies show a link between stated beliefs and behaviors (Cornett, Yeotis, & Terwilliger, 1990; Gess-Newsome, Southerland, Johnston, & Woodbury, 2003; Tsangaridou & O'Sullivan, 2003). Others, such as Murray and McDonald (1997), show discrepancies. In his review of the literature in this area, Fang (1996) claims that the research is inconclusive (p. 53). Some researchers have studied factors that prevent practitioners from acting on their beliefs (Cole, 1990; Murray & McDonald, 1997). Menges and Rando (1989) suggest that differences between beliefs and behaviors can be used as learning opportunities in professional education.

One final theme is that practitioner beliefs can be difficult to study. Some are implicit and participants may not even be conscious of them (Murray & McDonald, 1997; Tann, 1993). Not all researchers have found elicitation of beliefs difficult, however. Tsangaridou and O'Sullivan (2003) found participants eager to talk about their work.

Application of the research on practitioner beliefs.

The research on practitioner beliefs tends to have a focus on applying the results to improve practice. Much of the application is focused on professional education although there is some attention to professional development, especially in the form of encouraging reflective practice. Not all application is purely practical, however, as there is some focus on using this research to generate new theory.

Professional education.

Much of the research on practitioner beliefs argues for its application to improve professional education. Cole (1990), for example, argued that "time spent in the preservice program making explicit and examining these preconceptions and developing skills, habits of, and appropriate attitudes toward reflective practice will facilitate the development of self-aware and inquiring professionals who will then continue to examine and reflect on their teaching" (p. 205). Some papers included implications for their research in professional education (Andersson, 1993; Cook, Gilmer, & Bess, 2003; Fook, Ryan & Hawkins, 2000; Salmon, 1993; Spouse, 2000; Tann, 1993). Other studies described or evaluated specific educational interventions designed to help students articulate and evaluate their beliefs and apply them to practice.

One of the educational interventions proposed by Marshall (1990) involves using metaphors of teaching as a means to help pre-service teachers reflect on their work. She worked with students to examine their own metaphors, identifying "problematic" metaphors and coming up with alternatives, "to reconceptualize [the] problem situation" (p. 129). For example, she helped a student move from the concept of teacher as "warden" to teacher as "forest ranger" (p. 130).

In an intervention proposed by Copeland and D'Emilio-Caston (1998), students watched a videotaped class session to help them develop goals for their own teaching. The authors suggest that their research could help professional education by giving students a structure for their reflection. "While most of these authors tend to cast 'beliefs' in general terms, the present work suggests that one principle set of beliefs that could be examined are those specifically related to what should be the purposes of education" (p. 532). Ethell and McMeniman (2000) found that students benefited from observing videotapes not only of expert teachers in action, but also of expert teachers explaining their beliefs and intentions: "The teaching approach in this intervention is one approach to unlocking the wisdom of the expert practitioners hitherto considered tacit" (p. 99). Avraamidou and Zembal-Saul (2002) examined how technology facilitated exposing pre-service teachers' beliefs. The online portfolio of the reflections about teaching allowed students to see how their "philosophies" changed over time.

In a social work class, Trotter and Leech (2003) simply integrated personal theorizing into the course. They presented research to the class, discussed the intentions of the researcher, and facilitated discussion of students' beliefs. "Students can then be helped to develop their own personal theories in a more articulated form; a form which they can use in seminar discussions as well as adapt and apply in their practice" (p. 210).

Some scholars recommend new paradigms for professional education based on research on practitioner beliefs. Korthagen and Kessels (1999) suggested a new paradigm for teacher education focusing on theory building by pre-service teachers (p. 10). They found that when study of beliefs are incorporated into a constructivist teacher education program, teachers do not experience a theory/practice gap: "All 12 student teachers

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reported a seamless connection between theory and practice – a noteworthy result, given the many research reports from all over the world showing the problematic relationship between theory and practice" (p. 15).

Spruill and Benshoff (2000) planned a course of study that readied counselors for choosing and using a theoretical orientation. This course of study moves from having students examine their own informal beliefs at the beginning of the program, to learning about and reflecting on formal theories of counseling, to finally developing a statement of their personal theory of counseling at the end of their program.

Professional development.

The benefits of examining and articulating beliefs are not limited to professional education. A number of researchers argue that it can help with professional development, as well. Sanders and McCutcheon (1986) argued that teachers do not learn only from experience, but they "learn to teach through a process of practice-centered inquiry," of which examining personal theories is a part (p. 58). They recommended "practice centered inquiry" as a ways for teachers to reflect and change their practical theories, if necessary. Kettle and Sellars (1996) also highlighted the importance of reflection in developing beliefs and improving teaching.

Fook, Ryan, and Hawkins (2000) argued that social workers can use critical reflection to learn from their practice. They described struggling to help advanced social workers continue to develop and discovering reflective practice as their answer (p. 2). They observed that "practice is conceptualised as research, and the moments of 'not knowing' prized for what they can generate" (p. 10).

A number of studies report that merely participating in research on the topic helps practitioners to articulate their beliefs. Menges and Rando (1989) suggested that studying their beliefs is an excellent means to help teacher reflect and develop. "Participating in interviews like those reported here is an engaging activity for college teachers… Theory may then be inferred from the data and shared with participants, and this is very different from approaching theories as if they are received behavioral science truth" (p. 59). Participating in studies about their beliefs was actually a rewarding opportunity for them to be reflective about their work. Clandinin (1985) stated that "an interesting (and unanticipated) benefit of this study was the value teachers placed on the reflective opportunity to read and discuss interpretations of their work" (p. 382). Fitch, Mattson and Moore (1992) quoted one of their respondents as saying "I had fun taking this… It could be a good vehicle for stimulating thought, behavior, or feelings about my role as a counselor" (p. 7).

Human resources.

Hunter (1997) suggested that his participants' descriptions of "excellent" systems analysts could be applied to human resources related purposes, such as writing job descriptions, allocating work, selecting staff for project teams, identifying training needs, planning career paths, and performance appraisal (p. 79). It is interesting that no other study suggested these uses. It may be that these kinds of issues are not major concerns for professions like teaching and nursing.

Theoretical work.

A final application of research on practitioner beliefs is improving or generating theory. Many researchers call for more practitioner involvement in generating theory.

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Working with practitioners to surface their beliefs would be a way of allowing them to make a greater contribution to theoretical work. Researchers such as Crook (2001), Kover (1995), and Radwin (1995) mentioned the impact of their research for theory in their fields.

One example of theory development from practitioner beliefs is Klein and Bloom's (1995) "bridges of practice wisdom" model that showed how practice wisdom can be a bridge between science and social work practice. They argued that "practice and formal research are not opposed to one another but rather are connected such that each provides the raw input as well as the 'market'… for the output of the other" (p. 801). The theory-building process may evolve as "some practitioners begin to cumulate these experiences; to manipulate them in their imaginations; and to find similarities and differences of events, interventions, and outcomes to derive some meaning from this human encounter" (p. 803). This meaning could be capitalized upon for theory-building.

Pinnegar and Carter (1990) compared teacher personal theories to textbook theories and found that each had a distinct purpose. They concluded that "investigation into the tacit theories of teachers may lead to more useful ways of conceptualizing classroom learning" (p. 26).

Fook (2002) recommended that scholars and practitioners work together on theory-building. She argued that "this is the gift of postmodernism to social work – that we value and include the voice of practitioners and their own contribution in theorizing from their own practice experience. It is our responsibility to the profession that we enable and create cultures and environments in which this can happen" (p. 93). Brennan (1973) also advocated involving practitioners in adding to or generating theory: "There is

a great need for experienced and competent practitioners to feed back to the universities innovative theoretical insights which they have gained through long years of testing and retesting in the action labs of practice" (p. 11).

Implications for researching the practitioner perspective for reference work.

Several decades of research on practitioner beliefs suggests that this line of inquiry is fruitful and yields results that benefit scholars, practitioners, and professional educators. Because reference work has aspects in common with teaching, nursing, counseling and social work, it is logical that such research into the beliefs of reference librarians would be valuable, as well. Exploratory research into reference librarians' beliefs about their work, from basic statements of purpose to colorful metaphors, would provide insight into how reference librarians perceive their work.

Theoretical Frameworks for Understanding Reference Work

There is no single theory that guides the research and practice of reference work which makes it challenging to do reference, to study the phenomenon, and communicate about it. Lack of overall theory and definition has been noted by a number of scholars (e.g., Steig, 1980; Vavrek, 1968; Whittaker, 1977).

Many reference theorists have taken a process-oriented or systems framework in understanding reference work. This approach is perhaps the most common, spanning many decades from the 1960's to the 2000's. This approach views reference work as a series of steps in a process and is often depicted as a flowchart. Scholars who have explored this approach include Bunge (1970, p. 8), Crum (1969, p. 273), Jahoda and Olson (1972, p. 153-155), Richardson (1995, p. 122-123), and Shera (1966a, p. 32). Sometimes the "steps" in the process are not truly steps, but other influences, such as

Shera's (1966a) "The Librarian (his characteristics)" (p. 32) or Rees' (1966) comment that "the operation of psychological, sociological, and environmental variables" are also important (p. 58).

Understanding reference work as a process with discreet steps is a useful approach. It has helped to break a complex activity into component parts that can be studied, as well as taught to future librarians. Jahoda and Olson (1972) were able to develop an instrument to aid students of reference in answering questions (p. 150). Richardson (1995) clearly delineated each step in detail to facilitate development of artificial intelligence. Nearly all reference librarians are familiar with the *RUSA Guidelines for Behavioral Performance of Reference and Information Service Providers*. Although the guidelines are not explicitly based on any theoretical framework, they look similar to the process models developed over the last few decades. Process-oriented models have also served useful in understanding the more recent phenomenon of digital reference, such as Lankes' (1998) digital reference model and Pomerantz's (2005) process model of chat-based virtual reference, as they serve to show where new technology fits into the process.

These process models have a certain logic to them, as reference work can be observed as a series of behaviors, and it seems logical to describe it in a linear fashion. However, there are limitations to this approach. One limitation is a lack of holistic perspective on the process. Reference librarians may not perceive their work in terms of a series of discreet steps. Crowley's (1999) argument for studying librarians' tacit knowledge and Bivens-Tatum's (2007) argument for studying librarians' experiential knowledge support this concern. Also, the process models do not necessarily reflect the

leaps in intuitive thinking that librarians likely make, nor do all of them address the social, psychological, and other environmental contexts in which reference work occurs.

Another perspective that theorists have used for understanding reference work is that of the reference interaction as an act of communication (e.g., Gothberg, 1973; Radford, 1999; Rettig, 1978; Vavrek, 1974). This approach focuses on the verbal and nonverbal communication behaviors of librarians and users, as well as the content of the messages they share.

Some reference scholars have depicted reference work as the interaction between three components: librarian, user, and source (e.g., Hutchins, 1944; Shera 1966b; Vavrek, 1974; Whittaker, 1977). Recently, Agosto, Rozaklis, MacDonald, and Abels (2011) updated the model to include additional details about each component and about the interactions between components. Developed through focus groups with reference educators, the updated model reflects the increasing complexity of contemporary reference work.

Understanding reference as the intersection between user, librarian, and inquiry or source allows us to situate theory and research about the nature of reference into the broader discussion. For example, Taylor's (1968) stages of question formulation, Dervin's sense-making (Dervin & Foreman-Wernet, 2003), and Kuhlthau's (2004) information search process model focus on the intersection of inquirer and inquiry. In the last decade, the inquiry has been the subject of many research studies as the digital reference explosion has provided massive amounts of data that previously had been difficult to collect. Less theoretical attention has been placed on the librarian component.

While the librarian is linked to other components and needs to be studied within this context, it is valuable to isolate particular components for detailed study.

Modeling reference work as a series of activities, as a communication exchange, or as an interaction of three components is useful for understanding, studying, and teaching reference work. It is unclear, however, how these models relate to the practice of reference work as perceived by librarians. Do reference librarians perceive their work as series of behavioral steps or as an act of communication or as some different concept of which we are not aware? Exploring reference from the librarian's perspective allows us to understand this phenomenon in new ways. Whittaker (1977) stated that reference theory… must draw on reference practice to find much of the raw material it needs to formulate concepts and principles" (p. 50). Although previous theory has not neglected practice, it has not directly involved practitioners in its development. This involvement may lead to new insights. Doherty (2005) argues that "practitioners could… actively begin to develop or transform [reference] theory through critical reflection of their practice" (p. 16) Understanding the perspective of the reference librarian would help us understand this component of reference theory or it may offer a new perspective on existing theory.

Research on the Beliefs, Values and Attitudes of the Reference Librarian

Most of the research on reference work has focused on behaviors – actions taken by the librarian or user during the reference interaction. However, scholars have acknowledged that the behaviors constituting reference work are not the only aspect of the phenomenon worthy of study. Bunge (1999) argued that "the technical skills and knowledge of the helping professional seem less important to effective practice than are

the beliefs and attitudes held by the professional" (p. 15). Whittaker (1977) argued that studying these concepts was important for theory development (p. 50). What is known about the beliefs, values, and attitudes of the reference librarian? What is known about the librarian's "characteristics," as Shera (1996b, p. 32) called them, or the librarian's "personal frames of reference," as Crum (1969, p. 270) described them? Much research attention has been focused on the user and the user's query, particularly in the last decade with the profusion of data generated by digital reference services. Studies of reference librarians themselves are more scarce. Although some studies have examined the reference librarian and aspects of the librarian's perspective, it is a small body of research for professional work that has existed for over a century. In addition, the studies tend to be isolated, neither replicated nor developed. This section will discuss the isolated but interesting studies that exist on the reference librarian and the reference librarian's perspective.

Psychological characteristics.

Characteristics of good librarians have been of interest to researchers from very early in the study of reference. Wyer (1930) asked thirty-eight "eminent" librarians to rate a list of "traits" for their importance in reference work (see Figure 1). A number of lists of librarian characteristics followed, but they appear to be based on the authors' opinions rather than on systematic study (e.g., Hutchins, 1994; Mearns, 1948). More recently, Quinn (1994) and DeVries and Rodkewich (1998) generated lists of characteristics based on interviews with expert reference librarians (see Figure 1).

Wyer (1930) p. 235-238	Quinn (1994), p. 173	DeVries & Rodkewich (1998), p. 206-210
• intelligence • accuracy • judgment • professional knowledge • dependability • courtesy • resourcefulness • tact • alertness • interest in work • memory • mental curiosity • interest in people • imagination • adaptability • perseverance • pleasantness • cooperativeness • system • health • initiative • industriousness • speed • poise • patience • forcefulness • neatness	• command of resources • respects patron/question • approachability • exhaustive searcher • good interviewer/prober • avid reader • works well with colleagues • good listener • enthusiasm • excellent teacher • dedication • excellent referrals • sense of humor • helpful to new staff • great supervisor • assertive • mastery of catalog • open to experimentation • skilled in automation • appropriate use of sources • true visionary	In both 1990 and 1996: • approachability • curiosity • empathy • persistence • logical thought patterns • intuitive 1990 only: • non-judgmental • competitive 1996 only: • flexibility/adaptability • collaborative/work with others

Figure 1. Characteristics of expert reference librarians from several studies.

Two recent studies that did not aim to generate characteristics of good librarians nevertheless support some of the characteristics mentioned above. In analyzing the narratives of reference librarians who provide consumer health information, Borman and McKenzie (2005) found that participants tended to be protagonists of their own stories. Within this finding can be found interesting characteristics of these protagonists: trying their best, "organized, proactive, aware of expected role, well connected, attentive, and sensitive" (p. 143). Participants in Bronstein's (2011) phenomenological study of

academic reference librarians noted important personality traits for academic reference librarians today are to be "service-oriented, empathic, and patient when dealing with users" and to demonstrate "stubbornness and persistence when looking for information" (p. 804).

Studying experts to gain insight into what makes a good reference librarian seems sound and the resulting lists of characteristics are interesting. However, there are some problems with this approach. The content of the lists is not uniform and features psychological characteristics, as well as skills, behaviors, and knowledge. The lists may represent a particular place and time, for example, Wyer's (1930) results showing the importance of "memory" may not be as relevant for today's era of quick and easy Google and FAQ searching, and Quinn's (1994) "mastery of catalog" may have less relevance as catalogs become more user-friendly and increasingly resemble search engines. There is debate among the researchers about whether or not these characteristics are innate or if they can be taught (Quinn, 1994, p. 171; Patterson, 1984, p. 167). It is also unclear whether these lists of characteristics should be interpreted as standards or as ideals.

Studies of librarians' personalities have been conducted for decades. Agada (1984) and Fisher (1988) review personality studies through the 1970's. Generally these studies do not focus on reference librarians specifically, but in some studies, reference librarians or academic reference librarians emerge as distinct groups. For example, Scherdin's (1994) used a number of occupational and personality instruments to study librarians and found that academic librarians or reference libraries sometimes cluster as distinct groups. A personality study by Williamson, Pemberton, and Lounsbury (2008) found that academic reference librarians cluster with significant traits including

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customer-service orientation, extroversion, teamwork, and low tough-mindedness (p. 281).

Despite the limitations of investigating personality using a fixed-response instrument, these studies are significant in that they characterize academic librarians, reference librarians, or academic reference librarians as distinct groups. These studies do not show, however, how personality affects reference work and whether it accounts for variability in attitudes toward or philosophies of reference work.

Librarian values.

A number of studies have examined librarians' values. Unlike many of the other lines of inquiry to be discussed in this section, these studies have been replicated and scholars are making an effort to build a body of research in this area. Most of the studies on this topic are not specifically about reference librarians' values, but about librarians' values in general. The studies are relevant for situating reference librarians' values in a broader context.

Studies by Yerkey (1980, 1981) and Kirk and Poston-Anderson (1992) examined universal values of librarians. Universal values include terminal values, such as "a comfortable life," "sense of accomplishment," and "happiness" and instrumental values, such as "ambitious," "broad-minded," and "capable" (Kirk & Poston-Anderson, 1992, p. 6). These instrumental values appear to be similar to the "characteristics" addressed above. These studies used the Rokeach Value Survey to measure values and compared results across different groups of librarians (library directors, LIS faculty, and academic librarians, public librarians, special librarians, and LIS students) and across countries (USA and Australia). These studies allowed for generation of profiles and the authors

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argued for their usefulness in professional education and communication between professionals.

Another level of values that have been studied is values related to librarianship. Studies by Branch (1998), Dole and Hurych (2001), and Koehler, Hurych, Dole, and Wall (2000) examined professional values of librarianship such as service, equitable access, intellectual freedom, and preservation. These values are compiled from the LIS literature, not based on any specific value theory. These studies found that service is highly valued among different groups of librarians. While these results demonstrate value for service-oriented aspects of library work, such as reference, they are not useful in examining reference-related values. Of interest is their process of compiling values for study and their survey method for collecting data.

Knowledge and expertise of the reference librarian.

There are a few studies that have examined the knowledge and expertise of reference librarians. Some attempted to understand the structures of knowledge and decision-making involved in reference work. Others studied the progression of knowledge accumulation. And still others examined the importance of experience in developing expertise. Expertise may be more related to Crum's (1969) "information exploitation skills" than "personal frames of reference" (p. 270).

A few studies have explored the reference librarian's knowledge. Richardson (2002) cites Breed's (1955) dissertation in which he studied the knowledge of reference librarians (Richardson, p. 187). Although Breed's work has received little attention, it may be the first study to identify types of knowledge for reference work. According to Richardson, Breed's types include "(1) knowledge associated with a liberal arts

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education; (2) knowledge associated with library specialization; (3) personal knowledge; (4) knowledge gained in the search process; and (5) knowledge associated with subject specialization." An interesting finding is that 81% of librarian decision-making was attributed to this latter type of knowledge (p. 187). In Sundin, Limberg, and Lundh's (2008) study, librarians serving nursing students were found to have three types of expertise: "technical-administrative", which includes helping users with the technical aspects of databases, for example, "information searching", and "sources evaluation" (p. 27).

Ingwersen (1982) used think aloud and observation methods (p. 166) to study reference librarian thinking. The most relevant findings for this review are the influences on information searching of the librarian's knowledge structures and of the librarian's use of memory (p. 170). The librarian's conceptual knowledge of information seeking, his or her perception and picture of the immediate user's need, and his or her knowledge of documents combine to form the librarian's "image" of the situation (p. 170-171). In another study, Wu and Liu (2003) sought to profile reference librarians based on how they elicited information from users. Their study of elicitation style is based on communication behaviors, but it is designed to characterize reference work: "Is it possible that the professional role of reference librarians can be identified by the specific professional language used, particular questioning?... Do all the intermediaries employ one style?... Can this be a symbol of professional identity?" (p. 1119). Their observation of reference librarians' interactions with users and quantitative analysis resulted in three profiles of reference librarians' elicitation styles: situationally oriented, functionally oriented, and stereotyped (p. 1121-1122).

The previous studies of the knowledge of reference librarians focused on their body of knowledge and the structures of their knowledge. Another way to conceive of knowledge is as a collection of skills and competencies. There are a number of studies that have examined the skills and competencies of reference librarians. For example, Sweeney (2006) used the Dreyfus model of skill acquisition to examine reference librarians' skill development from novice to expert, and Luo (2007) studied the competencies librarians felt were important for doing virtual reference work. Saunders and Wilkins-Jordan (OCLC, 2012) will be studying competencies of reference librarians from an international perspective.

Two studies mentioned earlier, Quinn (1994) and DeVries and Rodkewich (1998), identified characteristics of reference librarians, but also focused on describing expertise. Although their work does not describe how this expertise functions or how librarians access or develop it, they at least begin to identify what it means to be an expert. DeVries and Rodkewich (1998) classified their experts by "their personal philosophy of reference service." They stated that "about half were motivated first and foremost by the needs of the patron... The other half of the group is motivated primarily by the intellectual challenge they personally feel during the pursuit of the answer" (p. 208). These personal philosophies are not explored in detail, and a strong link is not made between the data and these personal philosophies, but they are an interesting concept for future research.

Being an "expert" is often associated not just with skills but with a particular way of thinking about work, a "practical wisdom." Bishop (1915) asserted that "experience, too, counts for more in reference work than almost any other factor" (p. 137). He lists elements of this practical knowledge, including "acquaintance with the library's

resources,… knowledge of how similar questions were met before, [and] the curious ability to sense the real point at issue" (p. 137). Although no studies have been done about the practical wisdom of reference librarians, Fine (1995) outlined her concept of practical wisdom of reference librarians. Although she claimed that it passed a "flagpole" test (p. 17), this practical wisdom was not validated in any rigorous way. Her framework of practical wisdom includes "principles about users, principles about librarians, principles involving failed interactions, and principles involving scholars."

Attitudes toward technology.

Although attitudes of reference librarians were mentioned by Bunge (1999) as an important issue (p. 15), they have mainly been studied in relation to technology for reference. Janes (2002) and Janes and Hill (2001) studied reference librarians' attitudes toward digital technologies and resources; Shrimplin and Hurst (2007) studied their attitudes toward digital reference; and Steiner and Long (2007) studied their attitudes toward instant messaging reference. All of these studies addressed librarians' attitudes toward the technology (the tool), not reference work itself (the practice). So the results of the studies are not particularly relevant, but an examination of the methods could be useful.

Janes and Hill (2001) conducted an exploratory study by interviewing librarians. They state, "In the stories of these librarians, we will uncover clues to better understand, conceptualize and articulate what reference is becoming in the digital world" (p. 55). This exploratory study laid the groundwork for Janes' (2002) later questionnaire study in which he used cluster sampling to study academic and public reference librarians in large, medium and small libraries (p. 551). The choice of questionnaire method was powerful

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for Janes, in that he was able to reach 1,548 librarians with a 41.86% response rate and make comparisons across groups (p. 552).

Perhaps the most interesting result of Janes (2002) study is his findings related to positive and negative attitudes. In general, he found that reference librarians were positive and optimistic about digital technologies, claiming that the technology made reference "more interesting, more challenging, and more fun" (p. 557). Bunge (1999) claimed that "the reference librarians will be more effective if he or she has positive and accepting beliefs and attitudes toward reference librarianship as a job, toward the persons who are served, and toward himself or herself" (p. 23). Whether reference librarians have positive or negative attitudes toward their work and what makes their work "more interesting, more challenging, and more fun" would be interesting areas to explore.

Like Janes, Steiner and Long (2007) used a questionnaire, but focused on academic librarians. They claimed that they were interested in "capturing feelings" (p. 36), but really only captured librarians' responses to the feelings listed in their fixed response questions.

Shrimplin and Hurst (2007) used a Q-methodology, which involves participant sorting of statements and factor analysis of the sorts to identify patterns. This method allows for quantitative analysis of "human subjectivity" (p. 7). They were able to develop "attitudinal typologies" including "technophiles, traditionalists, and pragmatists" (p. 9). Although the method was effective for capturing attitudes and creating profiles, the statements used for sorting were focused on eliciting whether participants felt digital reference was good or bad, and thus their results reflected this.

Recent phenomenological studies of academic reference librarians have yielded conflicting results about positive and negative attitudes toward technology. Bronstein's (2011) participants viewed technology as "facilitating" and "empowering" (p. 800-801). In contrast, Burns and Bossaller (in press) found a "digital divide" among their participants. One group was enthusiastic about technology, while the other found it frustrating (Digital Divide: Librarians of Two Types section, para. 1-2).

Initial research into the practitioner perspective.

In addition to these studies of characteristics, values and knowledge, there are some isolated studies that provide some initial insight into practitioners' conceptualizations of reference work. These studies have taken an interpretivist approach to understanding reference work from the practitioner perspective. As with many of the studies mentioned above, the methods differ and they are not part of a broader research agenda, but their findings are valuable and are our only view into the practitioner perspective. These different approaches and research questions make it challenging to compare results across studies. However, themes include barriers and challenges to reference work, sources of satisfaction and dissatisfaction, and the purpose of reference work are common.

The concept of challenges and barriers is mentioned in several studies and is especially prominent in Borman and McKenzie's (2005) study. The challenges or barriers include time (Borman & McKenzie, p. 142; Duff & Fox, 2006, p. 144; Watson-Boone, 1998, p. 30), missing resources and institutional rules (Duff & Fox, p. 145), challenging questions or users (Borman & McKenzie, p. 135). While this approach seems useful, it is also somewhat negative and creates images of reference work as a struggle. Do librarians

really perceive the reference encounter as a contest? Or is reference work perceived more cooperatively like cooking together?

Sources of satisfaction and dissatisfaction with reference work is another concept reported in several studies. Sources of satisfaction mentioned by Watson-Boone's (1998) participants include the unpredictability of reference work, "mind puzzles," public contact and "challenges" (p. 32). "Helping the user" was the main source of satisfaction for Gerlich's (2006) academic reference librarians (p. 144). Duff and Fox (2006) found that sources of satisfaction for reference archivists were finding answers to users' questions (p. 147-148), user surprise and delight, interacting with users, helping users, and conducting research (p. 148). Sources of dissatisfaction mentioned by Watson-Boone's participants include "loss of autonomy" and "lack of completion" (p. 32). Duff and Fox found that sources of dissatisfaction for reference archivists were not being able to find an answer (p. 148) and user dissatisfaction with the interaction (p. 149).

Perspectives on the Purpose of Reference Work

An even more prominent theme than barriers or sources of satisfaction and dissatisfaction is the debate about the purpose and functions, or intellectual traditions, of reference work. The function of reference work has been a popular topic throughout the history of reference work. Often this discussion of role has been contentious or prescriptive and argued for one role at the expense of others. Much of the debate in the literature has centered on a dichotomy of reference work as information provision or instruction, as if these perspectives are the only ones and are mutually exclusive. There are, however, other perspectives in the literature that have received less attention and deserve a closer look.

Information provision.

Direct provision of information is often what comes to mind when people think of reference work. This function is described by Bunge (1980) as "finding needed information for the user or assisting the user in finding such information" (p. 468). In their textbook chapter, Bunge and Bopp (2001) suggested some examples of activities included in this component of reference work: "the simple provision of an address or telephone number, to tracking down an elusive bibliographic citation, to the identification and delivery of documents about a specific topic" (p. 7) as well as the more in-depth consultation required of "research assistance" (p. 10). Bunge (1980) used the general term "information services" (p. 468); Rothstein (1961) called it "getting information out of books" (p. 13); and Whittaker (1977) referred to this function as "enquiry work" (p. 58). Rieh (1999) used the term "information provision" which seems the best term for a contemporary discussion of this function.

Information provision has been a key function since the beginning of reference scholarship. Green (1876) advocated for librarians providing information, later described by Tyckoson (1998) as "assist[ing] readers in solving their inquiries" (p. 6). Wyer (1930) may be the greatest advocate of answering questions as the main purpose of reference work. His theory of reference focused on levels of service: "conservative", "moderate", and "liberal" (p. 6-13). The "liberal" level of service, where the librarian completely answers the user's question, was considered by Wyer to be the fullest level of service. He called it "progressive" and "enlightened" (p. 9). Those, like Wyer, who view provision of information as the purpose of reference work value delivering an answer to a user or

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providing them with a specific source that the user can employ to answer his or her question.

There is evidence in the literature that practicing reference librarians value provision of information as a function of their work. As part of their study of tasks and roles in the reference process, Alafiatayo, Yip, and Blunden-Ellis (1996) reported that "respondents perceived their role as intermediaries between the inquirers and information resources" (p. 368). Respondents' open-ended comments describing their role involved basic information provision (p. 368). The "highest ranked activity" was "answering requests to find source materials" (p. 367). A limitation of this study is that the researchers clearly defined reference work as information provision and their data collection instrument conveyed this bias. The choices that librarians were given to rank included 12 activities, nearly all information provision-type activities (p. 368). However, since there is so little research in this area, the results of this study need to be acknowledged.

Other studies emphasize the importance of information provision as a key function of reference work. Watson-Boone's (1998) approach was more open; she asked participants to "tell me what you do" (p. 11). From Watson-Boone's interpretation, her participants seemed to focus on the information provision aspect of their work (p. 28-32). Some of Gerlich's (2006) participants focused on information provision, as revealed in this representative quote: "helping people find things that they need… in the quickest and most efficient way" (p. 65).

Information provision is also a key function for reference archivists. Duff and Fox (2006) reported " a high level of satisfaction among her participants when documents

were found quickly and easily, when they were able to find good complete answers, and when the user found the information they needed" (p. 147). When asked to describe a satisfactory reference experience, the authors reported that "all 13 participants chose examples where they provided an answer that satisfied the user" (p. 147). Later the authors claim that "the main cause of archivist dissatisfaction was being unable to find the answer" (p. 148).

Obviously, the intellectual tradition of information provision is considered important to reference scholars, as well as to practitioners. However, there are some critics of this role. Wagers (1978) critiqued the "information as an end-product of service" approach, calling it "stultifying" and calling for theory that could "transcend" it (p. 278). Campbell (1992), though neither a scholar nor practitioner of reference, published an influential paper devaluing the information provision function of the work, suggesting that 75% of reference transactions could be automated (p. 31). Kuhlthau (2004) saw some value in the information provision role of reference work, noting that helping students with physical access was important, but just not as important as helping them with intellectual access (p. 114). Information provision is an important function of reference work, both in the opinion of scholars and practitioners. Yet, it is clearly not the only way to conceive of reference work.

Instruction.

The current climate of information literacy in higher education has highlighted the instruction function of reference work, but this tradition has played an important role throughout the history of reference service. Bunge (1980) defined instruction as "helping users learn the skills they need to find and use library materials" (p. 468). More

contemporary definitions extend this definition beyond just instruction in use of resources at the library to information literacy instruction, in general.

Those who advocate for instruction as a primary function of reference work see their goal as making the user self-sufficient. Vavrek (1968) articulated this value in saying that "service falls short of its capacity when the reference librarian neglects or refuses to extend a device for self-education to the user" (p. 510). Others see instruction as part of the educational mission of a library, especially an academic library. Elmborg (2002), for example, goes so far as to argue that "the reference desk can be a powerful teaching station – more powerful, perhaps, than the classroom" (p. 455).

The literature shows evidence that amongst practicing librarians the instruction function is valued. All of the studies reported participants specifically noting instruction or the researcher noting that instruction was an important part of their work. Respondents in Alafiatayo et al.'s (1996) study perceived their role partially as "teaching" (p. 370). Although the reference librarians studied by Watson-Boone did not specifically talk about teaching in relation to their reference work, she observed that instruction was an important component of their jobs (p. 33). Some of the academic reference librarians in Gerlich's (2006) study described their work as "teaching" (p. 60). Burns and Bossaller (in press) found that instruction was important to participants in their study: one of the themes that emerged from their data was "instruction not reference."

In their interpretation of reference archivists' "orientation," Duff and Fox (2006) reported a strong sense of the participants' role as teachers and the importance of teaching archival users to be independent (p. 133-135). However, the main source of satisfaction and dissatisfaction in the archivists' stories related to success and failure in

finding answers or specific materials for the user. The authors did not explore why the reference archivists, who claim a teaching orientation, feel satisfaction or dissatisfaction, not about student learning, but about effective question answering.

The conflict over the intellectual traditions of information provision and instruction is perhaps the greatest debate in reference work. The debate seems to have begun with Wyer's (1930) "conservative", "moderate", and "liberal" levels of service. Although Wyer did not place instruction in opposition to a liberal level of service, it seems that his work has been interpreted this way. In his discussion of instruction, Wyer claimed that helping a user to increase his or her knowledge about using the library was "commendable" (p. 279). He simply does not include instruction in his concept of reference. It is this separation of provision from instruction that Wagers (1978) claimed "created an unprofitable distinction" between the functions (p. 272).

A number of scholars have supported the argument that information provision, rather than instruction, is the proper function of reference work. Rothstein (1961) essentially saw arguments supporting instruction as excuses not to provide better service (p. 14). McClure (1974) stated that "any person is entitled to receive specific answers to questions involving needs for exact information… when people come to the library they do not want to learn about the methods and mechanics of biographic control; they want information" (p. 208). Rugh (1975) claimed that while instruction was important, it should not be considered a component of reference service, but rather something separate (p. 297). After reviewing the literature on the provision/instruction debate, Schiller (1965) concluded that information provision is the primary purpose of reference and that instruction is "not necessarily a reference function" (p. 60). Even Whittaker (1977), who

included instruction in his model of reference, acknowledged that "it is not universally accepted that library instruction is part of it [reference]" (p. 58). Despite Whittaker's inclusion of instruction, he classified it under the "library users" section, rather than the "librarians" section with no explanation for this choice.

Rothstein noted in 1955 that debate about levels of service had "dominated the theoretical discussion of the nature and extent of reference work" (p. 42). By 1992, Rettig described the positions as "firmly entrenched" and "inimical" (p. 159). He called instruction and information provision "the two cultures of reference librarianship" (p. 158). This metaphor is an apt. Just as people from different cultures can be challenged to understand each other and accept each other's values, librarians from different "cultures" of reference sometimes have difficulty understanding and appreciating each other.

Some scholars bemoan the debate between instruction and provision, arguing that it is misguided or unproductive to set provision and instruction in opposition to each other. Wagers (1978) argued that early reference theory included both instruction and information provision, but later theory "bifurcated" (p. 274) the earlier unified theory into an "information dogma" (p. 271) that excluded instruction. He further argued that guidelines that separate instruction from reference "prevent integration of significant component of service into a viable theory" (p. 277). He continued: "later theorists… in their desire to appear progressive, distorted these early contributions and erected misleading conceptions of effectiveness" (p. 279).

So perhaps the issue is not whether instruction or information provision is better, but whether or not one should separate the two functions. Wagers argued against separation: "Such a narrowing of scope [to just giving specific information] may be

productive if it serves to isolate key factors, but misleading if vital elements are not taken into account. With preliminary investigations which identify the relationships among reference factors, such a focus is presumptuous" (p. 277).

Nielsen (1982) is often cited as an advocate of instruction, but really he advocated for a new role for librarianship to be discussed later in this review. He expressed concern that the role of instructor and the role of information provider would co-exist and cause division in the profession and competition for resources. He saw this situation as a disaster and argued for a new role. "The present competition between those who advocate the intermediary role and those who advocate the teaching role is unfortunate and unnecessary. It divides the ranks of reference librarians at a time when unity of purpose on behalf of user needs has never been more important" (p. 188).

Clearly the intellectual traditions of information provision and instruction are important for reference work. The relative importance of each of these functions, however, is not clear. As previously mentioned in Duff and Fox (2006), for example, individual librarians seemed to value their role as information provider, as well as their role as instructor. In addition to these two key functions, however, others are explored in the literature. While they have not been included in the classic information provision/instruction debate, they merit consideration.

Interpersonal relations: Communication.

Another perspective on the function of reference work deals with interpersonal communication or relationships. This role is not clearly defined in the literature. It concerns the psychosocial dynamic between librarian and user, both the actual c*ommunication* that occurs and the subsequent *relationship* that develops. This section

examines the communication aspect of interpersonal relations. A review of the literature indicates that communication may be an independent purpose of reference work, but it may also simply be a skill that overlays other functions. A common metaphor for communication is a conduit, and librarians may see themselves as conduits, channels or intermediaries between the collection and the user

Bunge (1999) proposed "communication" as a way of conceiving of reference work (p. 15). Although Bunge (1980) did not include the concept in his encyclopedia definition of reference, he later addressed it in an extensive literature review (1984). Radford (1999) appears to be the key scholar in this area. She took a communications theory perspective and demonstrated the value of "interpersonal aspects," including attitude of the librarian, quality of communication skills, and approachability in the reference encounter (p. 73-74). She extended this work in an analysis of interpersonal dimensions in virtual reference live chat transcripts (Radford, 2006). Radford and Connaway's (2009) content/relational model emphasizes the importance of interpersonal dimensions, such as relationship quality, attitude, approachability, and greeting and closing rituals to the success of a reference interaction in traditional as well as virtual environments.

The relative value of the interpersonal dimension in reference work constitutes another important debate in reference work. This debate is not nearly as clearly articulated as the one concerning instruction versus information provision. Some scholars claim that communication or relationships are of key importance; while others set up an explicit or implied dichotomy, such as information provision versus interpersonal aspects. Radford (1999) set her communication approach in opposition to Katz, who she claimed

advocated information provision. Like Radford, Stover (2004) argued that "answering reference questions accurately is important, but in many ways attitudes, actions, and non-verbal communication are just as important as factual authenticity for quality reference service" (p. 290). Evidence from the field suggests that the interpersonal dimension is valued in the profession, as well. Alafiatayo et al.'s (1996) respondents described reference work as "a communication process" (p. 370). Gerlich's (2006) participants also mentioned communication (p. 62).

So does the literature suggest that there are two distinct dichotomies: instruction versus information provision and communication/interpersonal relations versus information provision? Or might communication and relational aspects overlay the instruction versus information provision continuum as some sort of additional dimension? Rather than being a separate function, communication may be an aspect of how other functions are performed. Research is needed to understand how all these elements fit together and how they interact in different situations.

Relationship building.

Although the relationship-building purpose shares much in common with the communication purpose, there are some differences. Rather than perceiving the reference librarian as a conduit or the human mediator between user and resources, relationship building takes the interpersonal dimensions of the reference interaction a step further. Radford (1999) argued that there are two goals of the reference encounter: to build relationships with users in addition to helping them satisfy an information need.

In his early discussion of the role of reference librarians, Green (1876) also seemed to support this perspective. Although Tyckoson (1997) interpreted Green's

"personal relations" as "promotion of the library", Green's phrase could be interpreted as "developing relationships with library users". Bunge (1984) also focused on the relationship aspects of Green's work, rather than the promotional aspects. Regardless of Green's exact intentions, it is clear that he highlighted the interpersonal aspect of the work. His recommendation that librarians "mingle freely with… users" indicates the importance to Green of librarians working to develop relationships (p. 78).

To date, studies of reference librarians provide some, but not strong, evidence of the importance of relationship building in reference work. In her ethnographic study of reference in an archival environment, Trace (2006) found that development of relationships was a result of "good" reference question, though whether or not these relationships were a deliberate goal of the service provider is unclear (p. 129). Why is the relationship building function not more frequently mentioned in studies of reference work? Perhaps it is perceived as a component of the communication function.

Guidance/aid in selecting.

Another function of reference work is guidance or aid in selection of sources. This function has been mentioned by a number of key scholars. Tyckoson (1998) attributed "Aid the reader in the selection of good works" to Green's definition of reference (p. 6), and it is described by Rothstein (1961) as "guidance in the choice of books" (p. 12). Bunge (1980) defines this function as "users are assisted in choosing library materials appropriate to their educational, informational, or recreational needs" (p. 468). Later he added, "helping to interpret materials so that readers can choose among them according to their interests and needs" (p. 470). Examples of guidance according to Bunge and Bopp (2001) included readers advisory, bibliotherapy, and term-paper counseling (p. 12-

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13). These authors acknowledged that guidance is "not as often discussed in the literature" although they claimed it has been just as significant (p. 11).

Research on reference librarians seems to indicate that they perceive guidance as an important function. Gerlich (2006) reported academic reference librarians using terms such as "guiding", "helping", and "advising" to describe their work (p. 60-67). She did not probe the meanings of these perceptions, so it is difficult to determine exactly what the librarians meant or how these perceptions related to others expressed by the participants. These librarians see "guiding" and "advising" as a component of what they do; however, there is no evidence in the literature that guidance or aid in selection is considered a primary or core purpose. In addition, it is unclear whether librarians who express reference work as "guiding" and "advising" are speaking about guiding or advising in selection of sources. One of the reference archivists in Duff and Fox's (2006) study mentioned "guiding people to a source", but the authors interpreted this statement as pertaining to instruction (p. 134).

Bunge and Bopp (2001) described information provision, instruction, and guidance as approaches that a reference librarian may choose from "depending on the needs and goal" of the user (p. 6). Rothstein (1961) viewed "these basic approaches or emphases" as " the three primary colors in the reference work picture… almost every respectable library in the United States and Canada does some of each; almost no two libraries mix the colors in quite the same way'" (p. 13). This metaphor of mixing colors to provide the perfect composition of reference service is beneficial because it recognizes some variety in approach to the work and hints at conscious choice in approaching service. However, Rothstein's metaphor is based on Wyer's conservative, moderate, and

liberal framework which is not necessarily adequate for describing the purpose of reference work. Also, Rothstein says that "libraries" mix these colors in certain ways, but libraries are not the entities that are selecting the colors. It may be that librarians "mix" approaches to service, but more research is needed to understand what these colors are and how librarians mix them.

Counseling.

A reference function that is similar to guidance and helping is counseling. This perspective has some characteristics in common with guidance and aid in selection, discussed earlier, but does not refer specifically to guidance in choosing sources. The guidance described in this theme is broader in focus, perhaps dealing with the whole research process or lifelong learning, and it is more in-depth. There is some overlap with instruction or communication, but the focus for this theme is an intense interaction between librarian and user, where the librarian attempts to lead the user to a greater understanding of his or her need.

Drawing on student personnel theory, Maxfield (1954) argued that fact-based reference and instruction does not meet the needs of users and that a counseling approach is required. He suggested that this is particularly important for librarians serving undergraduates (p. 8) although he sees evidence of this approach in readers advisory and bibliotherapy (p. 20). He says that librarians must take into account users' full needs: "There might be significant limitations for undergraduate library users in the conventional reference approach, and that librarianship at the college level possibly should give more careful attention to the student patron *as an individual person*" (p. 8). Later scholars, such as Penland (1970), distilled this approach to a technique, but

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Maxfield was clearly focused on developing counseling as a core purpose of reference work.

Maxfield's explanation puts counseling and information provision in opposition to each other: "The major emphasis in counseling, as already shown, is not upon any information that is to be imparted, but upon aiding of the individual toward self-motivation and self-decision" (p. 19). So while advocates for information provision might not be against counseling values, they would be at odds with the very purpose of counseling librarianship: the focus on development, not information.

Fine (1997) also promoted counseling theory and techniques to improve communication and build relationships (p. 90). However, Fine also argues for user development as a goal or at least a positive outcome of the reference interaction: "The growth of one becomes the mutual concern of both" (p. 81).

It may be appropriate to discuss Kuhlthau's (2004) examination of the role of the reference librarian in this section. Although her work focused primarily on users, Kuhlthau applied her finding to the librarian's role, developing five "levels of mediation". The highest level of mediation was termed "Counselor". Kuhlthau's Counselor level focused on helping a user achieve a greater understanding of the research process: "holistic… over time" (p. 119). This level also has some instruction overtones and may not be a close match to Maxfield's counseling function. However, her deliberate use of the term "counselor" and her references to holistic and intellectual development suggest more than simply an instructional exchange. She did not view counseling as an alternative or alongside other components but in a hierarchical relationship, with the Counselor level being a superior type of mediation (p. 118).

There is evidence that practicing reference librarians perceive guidance and counseling as part of their work. Alafiatayo et al.'s (1996) respondents described reference work as "advising, helping, guiding" (p. 370). Gerlich's (2006) participants used these terms as well, but as mentioned previously, their meaning is unclear.

Partnership.

Another way to view the work of reference librarians is as a collaboration or partnership. This perspective has much in common with counseling, but is isolated in this review because of its focus on a balance of power and the emergence of ideas through a synergy between librarian and user. This perspective is a more recent development in thinking about reference work. The literature hints at this theme, but it has not been fully developed. The concept of reference librarianship as a collaborative partnership is not so much a new activity, as a new perspective on existing activities. The roles of reference librarians discussed thus far, such as providing answers and instructing users, are somewhat focused on the librarian as agent. The emerging concept of a collaborative partnership between the user and librarian provides a balance of expertise and power.

Nielsen (1982) might be the first to have addressed the need for this new perspective in his call for a new role for reference librarians. He suggested that librarianship look to human services for inspiration: "Their message calls upon experts of all kinds to rethink their relationships to nonexperts, and to work toward the sharing of knowledge rather than its opposite" (p. 188). Rettig (1992) also acknowledged an imbalance of power in the reference transaction. In his critique of both the information provision and instruction approaches to reference, he stated "nor does either culture give due credit to information seekers' and librarians' complementary obligations and roles"

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(p.163). He felt that both cultures were "designed to promote a preferred role for reference librarians" (p. 162).

Mabry (2003), who explored the partnership concept, as did Stover (2004), also called for a rethinking of the reference librarian's "expert" status. Stover focused on the issue of librarian expertise in what he called a postmodern approach. He advocated perceiving the user as an expert in his or her own research endeavor. Through listening and dialogue, reference librarians can help users arrive at their own solution. Together, they can create knowledge through the research process, rather than simply finding and delivering existing truths. He stated: "The stance of the librarian as non-expert moves the profession of librarianship away from the technocrat/expert model and back towards its earlier mission of service and human-centered values" (p. 274). As an example of the arrogance of reference librarianship, Stover cites the de-emphasis of social sources of information and browsing, both of which are popular and effective ways for people to get information, in favor of searching (p. 290). Another advocate of this perspective, Doherty (2005) called for a new approach to reference that puts more control in the hands of the user. Doherty (2006) advocated for a "reference dialogue" instead of a "reference interview" (p. 107).

There is some evidence in studies of archival reference that librarians value a balance of power in the reference interaction. In their study of reference archivists, Duff and Fox (2006) quoted a participant saying "your role is a guide rather than as an expert" (p. 134). For this participant, a position of expertise was not a goal. Trace (2006) noted the concept of "reciprocity" in reference, which she described as "the constant exchange of information back and forth between the [service provider and user] as both learned

from each other" (p. 133). However, among the few studies of reference librarians'
perceptions of their work, none reported participants mentioning partnerships,
collaboration, sharing, or dialogue as functions of reference work. It is likely that the
researchers were not looking for this theme in their data since it is relatively
undeveloped.

Both answering the user's question and instructing the user imply an expertise
that puts the user in a lower position than the librarian. "Partner" implies that the user and
the librarian share an equal position. So this concept of partnership or the reference
encounter as a synergistic place where the information need is synthesized is an
interesting direction for theoretical discussion to go. It may be that this collaborative
partnership concept is not a purpose or role on its own, but merely a different way to
view another role, like counseling. There is enough discussion about this perspective to
merit further investigation.

Conclusions about the various purposes of reference work.

The literature reveals a diversity of perspectives about the function of the
reference librarian. The classic debate about whether the core purpose of reference work
is information provision or instruction is the main area of controversy. But to limit a
discussion to this dichotomy would ignore a number of other important functions. An
interpersonal function, whether it is merely communication or the establishment of
relationships between librarians and users, appears to be important to both scholars and
practitioners. The function of counseling is also considered important, as is the emerging
concept of a partnership between librarian and user. The relative value of these functions
has not been determined, nor has any model emerged for how they relate.

Research is needed to explore reference librarians' beliefs about the function of their work. Do they see their work as information provision, instruction, counseling, or some other concept that has not yet been explored in the literature? Do they see these roles as "colors on a palette" that they draw from in different situations or do they primarily identify with one role in particular? Research on this topic can use the functions highlighted in this review as sensitizing concepts in exploring reference work from the librarian's perspective.

The literature of other professions that are similar to librarianship, such as teaching, nursing and social work, have demonstrated that study of the practitioner perspective is valuable, resulting in contributions such as new theory development and improvements to practice and professional education. Research on reference work, on the other hand, has primarily taken a behavioral approach. Some research on this topic has studied the reference librarian or the reference librarian's perspective. These studies, however, do not provide a comprehensive picture of the practitioner perspective on reference work. A research agenda is needed to more thoroughly explore this perspective, to draw together the existing research and intellectual traditions of reference work.

CHAPTER 3:

METHODOLOGY

This chapter provides details about the method used for studying the experience of reference work for academic research librarians. It describes the methodology and rationale for the use of interpretative phenomenological analysis (IPA), and it details study procedures including participant recruitment, data collection, and data analysis. It also describes the steps taken to ensure study quality, including transparency and rigor.

Epistemological and Methodological Approach

Both qualitative and quantitative approaches have been used to study practitioner beliefs in other professions. Quantitative approaches are more often used when the range of practitioner beliefs have already been clearly identified. Qualitative approaches tend to be used in exploratory studies and when more in-depth understanding of the phenomenon is desired. Quantitative approaches about reference librarians have not yielded in-depth insights into the lived experience of reference work. As little work has been done in this area, it is appropriate to use a qualitative approach to achieve an in-depth and detailed understanding of the phenomenon of reference work by academic librarians. A qualitative approach will also allow for emergence of unanticipated findings.

The value of a phenomenological approach for LIS has been demonstrated in conceptual papers and research studies. Budd (1995, 2005) and Wilson (2003) have argued that a phenomenological approach is important to the understanding of issues in LIS. Budd, Hill, and Shannon (2010) argued that a phenomenological approach to

research can "find meaningful and substantive answers to questions that matter" (p. 269). Studies in LIS have used a variety of phenomenological approaches to study a variety of issues. For example, Introna and Ilharco (2004) used Heideggerian phenomenology to study the experience of computer and television screens. Kupers (2005) used the philosophical perspective of Merleau-Ponty to study implicit and narrative knowing in organizations. And Dalbello (2005a, 2005b) studied technological innovation and creative decision-making from a general phenomenological perspective using grounded theory analysis.

Interpretative Phenomenological Analysis

Rooted in psychology, IPA is a method for studying participants' lived experience of the phenomenon under study. The method originated with a paper by Jonathan Smith (1996) from Birkbeck University of London. Developed as a way to provide an in-depth, experiential perspective to experimental psychology studies, IPA has subsequently received greatest attention from psychology and health psychology researchers in the United Kingdom (UK). Examples of typical topics explored with IPA include chronic fatigue syndrome (Arroll & Senior, 2008) alcohol addiction and its impact on the self (Shinebourne & Smith, 2009), and hoarding (Kellett, Greenhalgh, Beail, & Ridgway, 2010). Expanding beyond the original focus on patients' experiences, several studies have turned the lens toward professionals in their fields, studying counselors' understanding of the spiritual dimensions of bereavement (Golsworthy & Coyle, 2001), nurses' mental models for assessing caregivers (Carradice, Shankland, & Beail, 2002), and counselors' experience of personal therapy (Rizq & Target, 2008).

IPA is a growing method with more studies being published every year (Smith, 2011, p. 12). The UK is still the hub of activity for the method, being the home of the annual conference and monthly workshops, as well as the major web site (http://www.ipa.bbk.ac.uk). However, the method is spreading from its origins in the UK to researchers in other countries (Smith, 2011, p. 12).

In addition to its geographic spread, the method is increasingly being used in fields outside psychology and health psychology. Smith (2011) provided some evidence of the spread of IPA to other fields (p. 13) although his study is limited by his use of only Web of Science, Medline and PsycInfo as sources of data. His study does provide evidence of the growing use of the method and expansion into new disciplines. He stated "one challenge for the IPA community is to get high-quality papers accepted in non-psychology journals so that the examples of work are available to a wider audience" (p. 23). Examples of topics studied by IPA researchers in fields outside psychology include coping effectiveness in golf (Nicholls, Holt, & Polman, 2005), "flow" for professional dancers (Hefferon & Ollis, 2006), and school experiences of gay and lesbian students (Robinson, 2010).

Although LIS researchers have not yet embraced IPA as a method, several information-related studies have been conducted by researchers in other disciplines, such as medicine, psychology, and management. Information-related topics explored using IPA include information seeking by patients with motor neurone disease (O'Brien, 2004), use of an online message board by arthritis patients (Hadert & Rodham, 2008), use of information sources before and after surgery (Powell, McKee, & Bruce, 2009), "enchantment" with technology (Ní Chonchúir & McCarthy, 2008), griefing in virtual

worlds (Chesney, Coyne, Logan, & Madden, 2009), and burnout among information technology workers (Evanstad, personal communication, July 10, 2011).

IPA is often identified as having three unique characteristics from which its procedures are derived: it is phenomenological, interpretative, and idiographic. IPA is firmly rooted in a phenomenological approach to research, in general seeking to understand and describe the participant's experience. Larkin, Watts, and Clifton (2006) stated that "at the core of any piece of IPA research… lies a clearly declared *phenomenological* emphasis on the experiential claims and concerns of the persons taking part in the study" (p. 104).

IPA is also interpretative. It goes beyond the descriptive, "position[ing] the initial 'description' in relation to the wider social, cultural, and even theoretical context" and "provid[ing] critical and conceptual commentary on participant's sense-making" (Larkin, Watts, & Clifton, 2006, p. 104). Descriptions of IPA often use the term "double hermeneutic". By this term, IPA researchers mean that it deals with participants' interpretations of their experience and also the researchers' interpretations of participants' interpretations. This focus on interpretation beyond description places it more in line with the philosophy of Heidegger and Merleau-Ponty, than with that of Husserl.

Perhaps the greatest distinction between IPA and other phenomenological methods is its focus on the idiographic. This term can have various meanings, but when used by IPA researchers it conveys the method's focus on individual experience. Rather than attempting to reveal only the shared experience or "essence" of the phenomenon, IPA studies value revealing differences in experience, as well. As IPA researches look for themes in common among all participants in their studies, they also try not to lose sight

of the individual participant's experience of the phenomenon. Larkin (2011) described this process as "prioritiz[ing] each case as a case and then consider[ing] convergence and divergence across our data set" (n.p.). While general phenomenological studies tend to focus on a common experience, such as love or being angry, IPA focuses on "personal meaning and sense-making in a particular context, for people who share a particular experience" (Smith, Flowers, & Larkin, 2009, p. 45).

As opposed to general phenomenology, grounded theory or discourse analysis, IPA is recommended when the goal is to "focus on personal meaning and sense-making in a particular context, for people who share a particular experience" (Smith, Flowers, & Larkin, 2009, p. 45). This focus on how participants make sense of their experiences makes IPA particularly suited to the research aims of this study.

Participants

Participants in the study are eight academic reference librarians working in the research library environment. The size of this sample is small enough to allow for in-depth analysis of each participant's account of experience. IPA research uses purposive sampling which is consistent with the principles on which IPA is based. Smith, Flowers and Larkin (2009) explain that "participants are selected on the basis that they can grant us access to a particular perspective on the phenomena under study" (p. 49) and suggest four to ten participants for a doctoral-level study (p. 52). They argue that "it is important not to see the higher numbers as being indicative of 'better' work… Successful analysis requires time, reflection and dialogue, and larger datasets tend to inhibit all of these things" (p. 52).

IPA procedures require that participants be a fairly homogenous group and represent the phenomenon under study. Purposively selecting a homogenous group of librarians allows for an understanding of the commonalities of the experience of reference work for this focused group, but also differences based on individual perspective. This approach does not, however, allow for exploration of all of the intellectual traditions concerning the purpose of reference work that may exist in the population of academic reference librarians working in research libraries. Rather than being representative of the population and including all perspectives, the sample explores the perspective of a group with similar characteristics or within a similar context. Once a better understanding of what constitutes "an experience of reference work" is developed, future studies could expand the research, targeting different groups of librarians and different intellectual traditions.

Inclusion and exclusion criteria.

Inclusion and exclusion criteria were chosen by the researcher to obtain a sample of librarians who could discuss the lived experience of reference work in an academic research library. To meet this end, participants were required to be working in an academic research library. They were also required to have reference work as an important component of their current job duties and describe themselves as "actively engaged in reference work." This criterion was designed to include librarians who participate in and value reference work. Participants were also required to have at least two years of professional experience providing reference service. Early career librarians may not have had enough experience to draw on for the purposes of the study. Two years of experience providing reference service were deemed sufficient to give librarians

enough time to acclimatize to their position and enough interactions with users to accumulate stories, attitudes, and thoughts about the work. Participants were also required to be available to participate in two interviews during Fall 2010 or Spring 2011 to fit into the time frame of the study.

Recruitment.

Three research libraries with large staffs were selected as sites for the study. These three libraries were chosen to allow for some diversity of environment as the study is not intended to be a case study, but the choice of sites was not intended to be representative of all research libraries. The three large academic libraries chosen are members of the Association of Research Libraries. These research libraries serve large and diverse populations of undergraduate and graduate students, faculty, staff, and occasionally users outside their university communities. The libraries at each institution have in-person and online reference services and provide library instruction. The participant group includes three librarians from each of two libraries, and two librarians from the third.

Potential participants were identified using publicly available staff lists on research the library websites. A list of potential participants was generated from the staff lists, including name, position title and contact information. Biographical information available on the websites, as well as the position title, was used to eliminate some potential participants who did not meet in the inclusion criteria.

Once a list of potential participants who met the inclusion criteria was compiled, three librarians from each site were contacted by individual email to explain the study and ask them to participate (see Appendix A). Initially only three librarians from each

site were contacted in case all of them wanted to participate. Although no potential

participants indicated that they were not interested, four of the potential participants did

not respond after several weeks. This non-response was interpreted as lack of interest in

participating in the study or a decision on the part of the potential participant that he or

she did not meet the inclusion criteria. These non-respondents did not have any particular

characteristics that distinguish them from those that responded. They represented two of

the three library sites and a variety of Humanities and Social Sciences disciplines. The

final participant sample included eight participants. In total, twelve recruiting emails

were sent, and eight librarians expressed interest in participating.

Participant description and context.

Participants in the current study include eight academic reference librarians

working in the research library environment. Three of the participants are female and

were given the pseudonyms Kate, Melinda and Sophy. Five of them are male and were

given the pseudonyms Alex, Dave, Jake, Mark and Scott. All of the participants provide

general reference services and instruction and have collection development and liaison

responsibilities to academic departments. Five provide subject specialized reference

services in Humanities and Social Sciences disciplines: Dave, Jake, Kate, Melinda and

Sophy. Three provide specialized reference services for Sciences disciplines: Alex, Mark

and Scott. Although data was not collected at the outset about the specific number of

years participants had been providing reference service, the interview data revealed a

wide range in length of career, from librarians with only few years beyond the minimum

number required for participation in the study (Melinda and Scott) to those with many

years of experience in a variety of different positions and libraries (Dave and Jake). All of the participants had done reference work in more than one library.

Ethical Considerations

Ethical approval was granted through the UNC Institutional Research Board. The final IRB application is included as Appendix B. The main ethical considerations for this research are protecting participants' anonymity, as well as the anonymity of users they may talk about during the interviews, and respecting participants' perspectives. Participants did not receive financial compensation for their participation.

Librarians who expressed interest in participating in the study were given a copy of the informed consent form (see Appendix C) during an initial meeting. The study was explained to the participant and any questions answered. Participants were informed of the measures that would be taken to protect their anonymity, but also informed that quotes from the interview would be used in the dissertation and future journal articles. Librarians who decided to continue with the study signed the consent form and received a copy. No potential distress was anticipated as a result of participating in this study.

Pseudonyms have been used to protect participant anonymity. In addition, details of participants' institutions, position titles, and academic liaison responsibilities are not reported. While information about liaison responsibilities could be useful for consumers of this research, the small sample size makes this information too revealing. Participants occasionally mentioned names of users or details of users' research. This information was removed from any extracts of the data.

Data Collection

The data collection method used for this study was semi-structured interviews. Although Brocki and Wearden (2006) found that some other methods are occasionally used in IPA studies, such as diaries, field notes, and email exchanges, the vast majority of IPA studies rely on interview data. The choice of semi-structured interviews as the sole source of data for the study reflects IPA's value on the participant's interpretation of the phenomenon under study.

Semi-structured interviews.

Two interviews were conducted with each participant. Each interview took approximately thirty to seventy-five minutes. The second interview occurred at least a week, but no more than three weeks after the first. Multiple interviews provided greater opportunity for development of rapport and trust. It gave participants the opportunity to reflect on the topic over time which occasionally resulted in additional insights. It also allowed me to recover from missed opportunities to probe interesting statements when they were first mentioned. The interviews were conducted in a location of the participant's choice. Locations chosen included the librarian's office, a meeting room in the participant's library, a café in the participant's library, or a café near the library. The interviews were conducted between December 2010 and February 2011.

The interviews were semi-structured. A set of questions was used to guide the interview. Smith, Flowers, and Larkin (2009) recommended six to ten open questions that include a variety of types: narrative, descriptive, structural, contrast, evaluative, circular, and comparative (p. 58). The interview questions were informed by these question types and questions asked in similar studies of other professionals (see Appendix D). The

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interview scheduled was designed to be used flexibly. Additional questions were asked in response to statements made by the participants. These follow-up questions asked for clarification or more detail. The interviews were recorded with the participants' permission.

Data Analysis

Data were analyzed using IPA procedures as detailed in Smith, Flowers, and Larkin (2009). IPA data analysis is a multi-stage process of generating themes from the data. Focusing on one participant's data at a time, analysis moves from the descriptive to the interpretative by capturing initial thoughts, generating tentative themes, and then refining these themes. Although procedures may vary somewhat from study to study, this study follows the typical process outlined in Smith, Flowers, and Larkin.

To prepare for analysis, the interview data was transcribed and copied into the central column of a theme development sheet. A sample page from a completed theme development sheet for Jake is attached as Appendix E. Although the sample theme development sheets are typed, the originals were handwritten.

Exploratory comments.

After engaging with the data by listening to the interview recording and reading the transcript several times, exploratory comments were noted in the right-hand column of the theme development sheet near the related data. These exploratory comments took three different forms: descriptive (describing the content of the data), linguistic (noting the language used by the participant), and conceptual (researcher questions or thoughts about the data). In the example in Appendix E, these various types of comments are distinguished by letters: "D" for descriptive, "L" for linguistic, and "C" for conceptual.

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The actual theme development sheets for this study were done on paper with pens of different colors of ink to indicate the different types of exploratory comments.

Emergent themes.

In the next stage of analysis, emergent themes were developed by examination of the exploratory comments along with the data. These emergent themes were written in the left-hand column of the theme development sheet near the original data and the exploratory comments that inspired them. Emergent themes reflect what is important to the participant, rather than what is of interest to the researcher (Larkin, Watts & Clifton, 2006, p. 111). The emergent themes were generated by looking for "interrelationships, connections and patterns" as suggested by Smith, Flowers, and Larkin (2009, p. 9). Examples of emergent themes can be seen in the left-hand column of the theme development sheet in Appendix E.

Super-ordinate themes.

In the next stage of analysis, emergent themes from each individual case were analyzed to identify clusters of related themes, called super-ordinate themes. This analysis consisted of grouping and regrouping the emergent themes for an individual participant to indentify and organize connections between the themes.

Six techniques were used for clustering themes. *Abstraction* involves putting like themes together and renaming the groups of themes. *Subsumption* involves putting like themes together and identifying one as a super-ordinate theme. *Polarization* is the process of identifying oppositional relationships among themes. *Contextualization* is identifying temporal, cultural or narrative elements among the themes. These could take the form of critical events. *Numeration* involves noting themes that frequently occur.

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Function involves identifying the function played by particular themes, similar to discourse or narrative analysis (Smith, Flowers, & Larkin, 2009, p. 96-99).

Since software was not available for this process, the emergent themes from a participant's theme development sheet were recopied onto sticky notes or typed into a document, printed, and cut out. The emergent themes copied onto sticky notes were grouped and regrouped on large sheets of flipchart paper. The emergent themes printed on slips of paper were grouped and regrouped on a large tabletop. The physical manipulation of emergent themes stimulated creative thinking and allowed for themes to be easily considered in relation to other themes. This process of manipulating emergent themes spanned several days for each participant to allow for insights that sometimes take time to occur. At the end of this process, all of the emergent themes for a participant were grouped into a set of super-ordinate themes for that participant. Participants had between four and eleven super-ordinate themes, with some super-ordinate themes have subthemes, as well. A super-ordinate theme table was created for each participant, listing the super-ordinate themes, the corresponding emergent themes, key phrases from the data that provide evidence for each theme, and a page number for the location of the key phrase on the participant's theme development sheet.

Master themes.

Following development of super-ordinate themes for each participant, the final stage of analysis began: development of master themes for the group. The tables of super-ordinate themes for each participant were compared to generate master themes, identifying higher order qualities, as well as unique characteristics. This process involved looking for patterns across cases and responding to questions such as "What connections

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are there across cases? How does a theme in one case help illuminate a different case? Which themes are the most potent?" (Smith, Flowers, & Larkin, 2009, p. 101) As with the development of the super-ordinate themes, the process of developing master themes spanned several weeks and involved grouping and regrouping.

Five master themes resulted from this process. Each of the master themes also has several subthemes that help convey aspects of each master theme. A master theme table was created that lists each master theme and subtheme with selected extracts from the data that provide evidence for the theme. This table is not intended to be comprehensive, but rather selects evidence that best exemplifies the theme. The master theme table is attached as Appendix F.

Measures for Assuring Quality

One of the benefits of the growing literature surrounding IPA is its contribution to discussions of assessing quality in qualitative research. There can be a tendency for researchers to view quality criteria as stable and universal and to take a checklist approach to ensuring a quality study. IPA procedures discourage the use of traditional measures of quality or "trustworthiness" that may not be consistent with IPA's philosophical basis. For example, using observation for triangulation of data is not appropriate for an IPA study because it does not reveal the participant's interpretation of the phenomenon. Member checks are not appropriate because they imply that the participant's interpretation of the phenomenon is the final level of analysis. Therefore, to ensure quality for this study Yardley's (2000) criteria were used to guide and assess the study, as recommended by Smith, Flowers, and Larkin (2009, p. 179). In addition, Walsh and Downe's (2006) criteria were also used because they provide more concrete and

comprehensive guidance for both researcher and reviewers. Finally, as the study was underway, Smith (2011) published some additional criteria specifically for IPA studies, so these criteria were also taken into account.

Addressing Yardley's criteria.

Smith, Flowers, and Larkin (2009) recommend that IPA researchers use criteria developed by Yardley (2000). Yardley recognized that traditional measures of quality, such as those developed by Lincoln and Guba (1985), did not adequately meet the needs of the growing number of qualitative methods. Her framework for ensuring quality has "open-ended and flexible ways of assessing quality, which are applicable to many different QMs [qualitative methods]" (p. 218). Yardley's criteria are "sensitivity to context", "commitment and rigour", "transparency and coherence", and "importance and impact" (p. 219). Although these criteria are broad, they are suitable for any qualitative method. And perhaps more significantly, they encourage the researcher to reflect about the best strategies for ensuring quality for his or her study.

"Sensitivity to context" refers to situating the study within the theoretical and research context, the context of the data, and the socio-cultural context. In this study, a thorough literature review was conducted to demonstrate how the study is situated in the context of previous research and theory. In addition, after analyzing the data, additional literature was consulted to help shed light on the findings. Sensitivity to the data was achieved by allowing themes to emerge from the data itself, rather than imposing structures of interest to the researcher or previous structures found in the literature. Awareness of the socio-cultural context and the context of the relationship between the participants and the researcher is revealed/demonstrated in the Reflexivity section of this

chapter, but also throughout the Discussion chapter, as the thoughts, feelings, and opinions of participants are interpreted in relation to the broader context in which reference work is performed.

"Commitment and rigor" were achieved by prolonged engagement with the data, by serious application to learning the IPA methodology (through reading the texts, exploring the relevant websites, discussion with other researchers, and examination of dozens of studies that used IPA as a method). Other measures taken were serious application to following the steps of the procedures, collecting complete and thorough data, fully analyzing it, and pushing myself toward interpretation rather than description.

"Transparency and coherence" refer to how well the consumer of the research can follow the process and understand how conclusions were drawn. Throughout the study notes were kept about study procedures. Justifications for decisions and internal debates were also noted. The internal audit, detailed below, attests to the degree of transparency in the study. Attention to coherence is evident in the care taken in the report of the study, the attention to linking the research question to the methodology used and between the methodology and the analysis.

"Impact and importance" refers to the theoretical and practical contribution of the study. Attempts have been made to link the research to a clear lack of knowledge in the literature. The study is intended to enhance the general understanding of reference work, but also to benefit the profession. Implications of the findings for theory development, reference practice, and professional education are thoroughly discussed.

Addressing Walsh and Downe's criteria.

In response to the numerous frameworks proposed for ensuring quality in qualitative studies, Walsh and Downe (2006) conducted a meta-synthesis of quality frameworks being proposed in the healthcare literature. Their meta-synthesis includes Yardley's criteria, as well as seven other frameworks. They organized the various measures of quality into a chart that is designed to provide structure for researchers and reviewers, but also to provide some flexibility to accommodate different qualitative methods. While "checklist" measures of quality are sometimes criticized, when used properly, such a checklist can allow consumers of the research to quickly scan the efforts made by the research to ensure a quality study. Walsh and Downe's criteria are also helpful because they are not only comprehensive, but concrete. The presentation of these quality efforts into a scannable chart, may also help to convey efforts to researchers familiar with quantitative research. Appendix G shows the specific ways that this study addressed Walsh and Downe's strategies for ensuring quality.

Addressing Smith's criteria.

Smith (2011) developed specific measures of quality for IPA studies. Although he still recommends Yardley's criteria as the main criteria for ensuring a quality study, Smith felt that additional guidelines specific to IPA studies would be useful. To develop these guidelines, he worked with another researcher to examine fifty-one IPA studies and to categorize them as good, acceptable, and unacceptable (p. 16). He further examined the exemplary studies to articulate the features of an exemplary IPA study. His criteria can be summarized as follows:

- a clear focus

- strong data (resulting from good interviewing)

- support for themes extracted from each participant's data

- sufficient elaboration of each theme

- interpretative, rather than merely descriptive

- analysis includes patterns of similarity as well as uniqueness

- paper carefully written (p. 24)

By the time Smith's paper was published, the current study was already in the analysis phase. So his first two criteria were not used to guide the study. However, the study had been guided by a clear focus on the experience of reference work for the participants. Although interviewing can always be improved upon, the data that resulted from the interviews was rich and relevant to the research question. Some interviews were stronger than others, and notes were taken about issues that could be addressed in the future, such as phrasing of questions and choice of location. The third, fifth and sixth criteria were used to guide the analysis, and the fourth and seventh criteria were considered in writing the analysis and discussion.

Independent audit.

To demonstrate that credible conclusions were drawn from the data, and that procedures were being followed to ensure a quality study, an independent audit was conducted. In an independent audit, a researcher not associated with the study, but familiar with IPA procedures reviews study documentation including the proposal, research log, interview data, theme development sheets, theme tables, and draft report. According to Smith, Flowers, and Larkin (2009), the role of the auditor is "to check that the final report is a plausible or credible one in terms of the data which have been

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collected and that there is a logical step-by-step path through the chain of evidence" (p. 183). This procedure differs from inter-rater reliability in that there is no attempt to reach a consensus in interpretation of data. Recognizing the unique interpretation of the individual researcher, the audit is intended to assure consumers of the research that the conclusions were logically derived from the data and that the study is "systematic" and "transparent" (p. 183).

Once the data had been analyzed, recommendations for an auditor were solicited from the IPA discussion list. Dr. Tamar Posner, a psychotherapist and Visiting Lecturer at the University of Hertfordshire who has experience reviewing IPA studies, agreed to do the audit. Dr. Posner reviewed the proposal, research log, interview data, theme development sheets, theme tables, and results. She found the study "systematic" and "transparent." Her evaluation of the study is included in Appendix H.

Reflexivity.

As the researcher in this qualitative study, it is important to examine my social location. At the outset of the study, I reflected on how my past experience providing reference service would affect the study. My twelve years as an academic reference librarian in a large university library provides me with an insider perspective, but also raises the risk that I would impose my own experience of reference work on that of the participants. I was also a reference department manager for seven years. During this time, I noticed differences in what librarians valued and how they provided service. My management experience has allowed me to view reference service from the big picture standpoint, as opposed to the narrower view I had as a front-line librarian, and it has

helped me to develop an appreciation for the diverse ways that professionals can approach their jobs.

While conducting the interviews, I tried to be open to words or ideas that could mean something different things to the participants than they do to me. Establishing trust and rapport with participants can be a challenge in qualitative research. My background as a former academic reference librarian helped them to perceive me as part of their group and as a sympathetic listener. In fact, some of the participants knew me in my former role, and all were familiar with the library in which I had worked. I know the participants had this information in mind as several of them made comments as they talked such as "I don't know if you experienced that when you were… working." I also drew on my management experience of putting supervisees and job candidates at ease and drawing out their stories, interests and concerns. Some participants had known me in my former role as a librarian or had heard of me in that role. This knowledge was another aid in establishing rapport, but I continuously questioned whether it caused these participants to be unwilling to share negative comments or depict themselves or users in unflattering ways.

During analysis and interpretation, I questioned my interpretations, frequently returning to the data and exploratory comments to ensure that my interpretation was derived from the participants' words rather than my assumptions or the literature. I experienced frustration as I realized that some aspects of reference work that I had hoped to illuminate might remain obscure or as the themes seemed to fit together less neatly than I had hoped. I interpreted these frustrations as a sign that I was not overly influencing the data.

An interesting aspect of the study for me as the researcher was developing a new perspective on the work I had done as a reference librarian. I recognized in many of the participants' words stories from my own experience although I would not have thought to mention them or talk about them in that way. A positive benefit was a feeling of renewed appreciation for the challenges of the work that I had done, as well as a sense of shared experience with the participants.

Conclusion

The examine the lived experience of reference work, interpretative phenomenological analysis was chosen as an approach that reveals both convergence and divergence of experience of the phenomenon and that offers a rigorous method for interpreting data. Eight participants who work in academic research libraries were interviewed about their lived experience of reference work. The data were analyzed according to the multi-stage process of IPA, focusing first on each individual participant with development of exploratory comments, emergent themes, and finally super-ordinate themes, and next focusing on the group, combining each participants' super-ordinate themes into master themes for the group. Throughout the study, efforts were made to be transparent and rigorous and to adhere to guidelines of quality appropriate for the method.

CHAPTER 4:

RESULTS

Five master themes emerged from analysis of the data: Importance of the User, Variety and Uncertainty, Fully Engaged Practice, Sensations of Reference Work, and Sense of Self as Reference Professional. As Figure 2 shows, each of these master themes is also divided into subthemes to express more specific concepts. In this chapter, each of these master themes and subthemes will be explored in depth, using extracts from the data to support and illuminate each theme. These extracts are selected from the Master Theme Table (Appendix F) which includes all quotes from the data related to each theme.

Master Themes	Subthemes
Importance of the User	Focus on the user
	Connection and relationships
	Influence and power of the user
	Managing user feelings and expectations
Variety and Uncertainty	Varied users and contexts
	Multiple purposes for the interaction
Fully Engaged Practice	Effort and persistence
	Immersion in an individual interaction
	Intuition and "reading the user"
Sensations of Reference Work	"Joy of helping"
	Delight in the intellectual challenge
	Anger, frustration, and embarrassment
	Nature of failure

Sense of Self as Reference Professional	Professional identity
	Power of experience
	Changes in the experience over time

Figure 2. Master themes and subthemes.

The first master theme, *Importance of the User*, expresses the dominance of the user in the participants' experience of reference work. The participants often viewed the user as a powerful force in the interaction, taking responsibility and taking control *(influence and power of the user),* which led to a *focus on the user*, conveying the user's centrality in reference work, including the participants' concern for and empathy with users. Such empathy prompted the participants to develop personal *connections* and ongoing *relationships* with users, including managing the affective dimensions of the user experience, especially *user feelings and expectations*.

Secondly, the participants identified a broad theme of *variety and uncertainty* that pervades the entire experience of reference work. Specifically, *varied users and contexts* conveys the diversity of user groups, locations, and modes of delivery that participants encounter, while *multiple purposes for the interaction* expresses not only the diversity of goals for a given interaction, but also the uncertainty or ambiguity about what the purpose of that interaction should be.

Third, the master theme *Fully Engaged Practice* gathers subthemes that indicate how the participants engage in their work deeply and deliberately. *Effort and persistence* conveys how hard the participants work to bring the interaction to a satisfactory conclusion, *immersion in an individual interaction* expresses the participants' preference for a deep, immersive, meaningful engagement with the user and the user's question, and

intuition and "reading the user" conveys the empathetic, almost mysterious practice of trying to understand the user's needs.

The last two themes focus on the participants' internal experience of reference work and their resulting identity development. The master theme *Sensations of Reference Work* represents the continuum of affective aspects of reference work, such as the elated *"joy of helping"* the participants feel when they are able to be useful to users and their *delight in the intellectually challenging* questions and learning during the reference interaction. However, this theme also includes negative emotions present during these interactions, such as *anger, frustration, and embarrassment*, and explores the inevitable and ambiguous *experience of failure* and its accompanying sensation of feeling out of control. The final master theme, *Sense of self as reference professional*, conveys how *professional identity* and *past experience* affect the participants' present experience of reference work. In particular, it captures the cumulative effects of professional experience, and how that experience has *changed over time* over the course of the participants' careers.

Importance of the User

The user looms large in the experience of reference work for each participant. More than any other aspect, the user influences the experience, determining both the work's direction and how the participant feels about it. In discussing her experience of reference work, Sophy expresses a commonality for all participants with the words "you're very user-centric."

Focus on the user.

In describing their experience, participants focus on "who" rather than on "what." For example, Dave finds *how* users think about their questions to be more interesting than the questions themselves: "I like to deal with questions, you know, what their approach to, you know, how people are thinking about approaching whatever their question is." Kate and Melinda similarly state that interacting with users is the most important or the most exciting part of their work. Dave's acknowledgement that librarians sometimes lose this focus is another way of emphasizing its existence: "I think there's some places where you sort of get so tied up in the technology we forget it's people that have to use this and in real time."

All of the participants' stories about reference interactions, both successful and unsuccessful, focus on the user. In fact, the stories often begin with a description of the user and offer details about user characteristics, user needs and user reactions to the outcome. For example, the beginning and ending of a story recounted by Alex represents this consistent pattern across participants.

> Yeah, one thing… would be my interaction with a professor back at [university]. She's one of the most experienced professors in [discipline], and she has used the library very extensively from when she was a student and became a professor. She's still uses the library. She comes to the library very regularly… like a miracle for her. So she was so thankful, and she went on learning.

Even Jake, who includes lots of details about his strategies and the sources he uses, identifies the user as the central agent of his narratives.

Focusing on the user also means that participants try to see the user in the broader context of his or her life, not just as a library "patron" with a momentary need. For example, Sophy places reference work in perspective of the user's larger world: "this is

one thing they're doing in the middle of a gazillion other things they're doing."

Participants seem to give their professional goals a lesser priority than the user's goals, often empathizing with the challenges users face: "they're gonna get that information and then they're gonna have to do something that's really much more hard: synthesize it and make sense of it, do something meaningful with it, try not to plagiarize. I mean all that is way harder, I think, than what we have to do" (Sophy). Participants clearly pay close attention to what users are doing and are also genuinely concerned about gaps in user skill. As Alex says, "they may miss out a whole lot of things, they just go about… searching their familiar places in familiar ways." Alex describes this approach as "not efficient" (Alex) and Jakes notes that "they don't know some very basic source that maybe they should" (Jake). Mark observes, "you watch them search, and they're terrible at it and they don't know what they're doing, and they don't know how to deal with any weird problems." Participants find users' lack of search skills "scary" (Alex) and describe their research as a "futile… struggle" (Mark). Yet judging by their tone of voice and facial expressions, the participants are not critical, but rather concerned. Alex even acknowledges responsibility for this skill gap: "we haven't probably done the best to reach out… people who have felt alienated, and who haven't understood… what's going on."

Connection and relationships.

The importance of connecting with and relating to users is another strong theme. Developing long-term relationships with users is highly valued, and participants express the importance of making a connection through strategies like developing a rapport and

partnering with the user. They also describe developing greater relationships with specific user groups.

Alex ranks relationships with users as the most exciting aspect of his work, Dave describes relationships with users as the "most satisfying" aspect, and Jake describes them as "really gratifying." In one example, Dave recounted a story of a user with whom he originally had a good working relationship. However, at one point he was not able to help the user who became frustrated. With a tone of regret, he described this relationship as a "ruined." Even when a formal relationship does not develop, connecting with the user is of great importance. Aspects of connecting with the user include communicating well (Mark), having a good "rapport" (Mark), "build[ing] trust" (Melinda), and being on the same "wavelength" (Mark).

This connection with the user is presented as an active partnership; participants often work together with users and use the terms "partner" (Kate, Mark, Sophy) or "comrade" (Sophy) to characterize the relationship. Mark emphasizes this idea of working together when talking with the user: "I use the word 'we' a lot when searching like, or 'us' or let's try searching this and then we should do this and then maybe we can try this." Jake likens the reference interaction to a non-antagonistic "sparring."

For some participants, a particular user group dominates their attention, often one that connects with the participant's area of subject specialty. The participants identify strongly with this group, calling them "my clientele" (Alex), "kind of my people" (Melinda), or "my students" (Sophy). This relationship is described as "tighter" than others (Alex) and "ongoing" (Scott). An exception to this trend is Mark's identification with users for whom he provided citation management expertise, rather than subject

expertise. Clearly, connecting with users is valued, as is developing deeper, ongoing relationships with important user groups.

Influence and power of the user.

Despite these impressions of togetherness and partnering, there is definitely a sense that the user sometimes wields all the power in the interaction. Sometimes the interaction is a negative situation in which participants feel out of control. This concept of lack of control will also be explored in the *Sensations of Reference Work* section, but is important to mention here to demonstrate the user's control over the interaction.

For the most part, user needs and characteristics play a greater role in determining the course of the interaction than do the librarian's philosophy or intention. Specifically, the interaction can be affected by the user group (such as student or faculty status), the user's skill level, the user's degree of sophistication, or the user's personality. Participants also describe a number of possible purposes for the reference interaction, including providing an answer to a question, teaching the user, addressing the user's affective needs, and saving the user's time. These purposes will be addressed more fully in the *Variety and Uncertainty* theme. The point of mentioning them here is that it does not seem to be the librarian alone who makes the choice about what course the interaction will take. This choice instead depends on multiple factors, including the user needs and characteristics listed above.

Specifically, between user groups, e.g. student or faculty status (Dave, Kate, Jake), "the whole tenor of the discussion is really different" (Scott). Scott also mentioned the user's skill level: depending on whether a user is a novice or expert researcher, "the responsibility of the librarian is really different." For Jake, the user's level, which he

defines as his "perception of their sophistication and interest," can likewise change the discussion "enormously." Another characteristic that affects the course of the interaction is user personality. Scott mentions this effect often, saying that he is "kind of perceiving this and then gearing the conversation or the interacting… based on the patron's kind of, uh, personality," though he goes on to describe the user's behavior rather than his or her personality. At any rate, user-librarian interactions are clearly affected by certain characteristics of the user, and do not represent the librarian's preprogrammed agenda.

Some participants describe user power as manipulative or mean. For example, Dave recounts completely losing control of a virtual reference interaction when a user got angry with him: "And so she was mad and she disconnected me." Jake also sees the user as occasionally manipulative: "they've been dishonest and say, 'Well, what I really wanted...' And it's like, why in the hell didn't you say that at first because it would have been a lot simpler all the way around?"

On the other hand, participants also view user power in an extremely positive way, particularly because the user should take responsibility for the interaction. For example, Jake states, "some of it's incumbent upon them to… ask you what they really want," and Mark sees an important balance of power: "you're kind of like partners too, because you don't…really know." User responsibility is a particularly important theme for Kate: "[there is a] certain amount of influence you can have… then at some point you don't" and "whether or not they then apply those skills… is really…up to them." Overall, this theme expresses how much the experience of reference work is influenced by the user.

Managing user feelings and expectations.

Participants seem to be keenly aware of the users' affective states. They comment about user feelings, and more specifically about user frustrations when their expectations are not being met. Some of their observations of user feelings include "I'm sure she was embarrassed and you know, frustrated and embarrassed" (Dave) and "she's feeling a little overwhelmed" (Sophy). There are several accounts of user frustration stemming from unrealistic expectations of the reference interaction. Mark says, "she had…very specific expectations, and I wasn't meeting them." As discussed earlier, the participants demonstrate genuine sympathy for these feelings. As Melinda says, "they have expectations that are…a little large for…'my paper's due tomorrow, so I'm gonna go in tonight'…that's frustrating… you want them to do well."

Beyond simply dealing with user emotions and expectations, some participants describe actively managing them. Participants specifically mention trying to alleviate user anxiety. Alex proudly describes working with a particular user, saying "I removed the fear in her mind…and also the self-perception that she was being alienated." Mark describes his efforts as "like making it not seem so scary." Participants also try to help users "become comfortable" (Mark) and contribute to "building up of their confidence" (Sophy). Melinda sees herself as the "mediator" of the users' "frantic… energy." Melinda also mentions a strategy of "leaving the user in a place where they feel like…they've been listened to, their needs have been explored." Overall, the experience of reference work is again dominated by the user. The central focus of the interaction is the user, including his or her needs, characteristics, and emotions. Connecting and working with users is important, as is allowing or encouraging them to take control when necessary.

Variety and Uncertainty

Another strong theme that characterizes the participants' overall reference work experience is variety coupled with uncertainty and ambiguity. This theme permeates the context of their work and the purpose for the reference interaction. *Variety* is a concept that arises frequently as participants discuss their work. Some representative phrases include "a lot of variety" (Kate), "it kind of varies" (Melinda), "change of pace and variability of it at all levels" (Kate), and "it's a mixed bag" (Melinda). Coupled with variety is a sense of uncertainty or ambiguity, as well. Participants state that they never know what questions they might be asked, what path a reference interaction might take, or what reaction a user might give.

Some participants express this explicitly; for others, it becomes evident as they talk about their work. Comments that illustrate this uncertainty include "you never know what you're gonna get or where it goes" (Jake), "when you work at a reference desk, it's like anyone can ask you any conceivable question at any time" (Mark), and "[you] really, truly never know what's gonna come at you" (Melinda). Other phrases hint at a lack of control for the direction of the interaction: "wherever it takes you" (Dave) and "you're not in control of what's going on" (Kate). However, this variety and uncertainty is generally expressed in a positive way. Participants seem to recognize the potentially overwhelming notion of "any conceivable question," but their tone in describing this theme is bright and positive. Their words express a positive perspective, as well; Dave and Kate both use the word "nice" in describing the variety (Dave, Kate).

Varied users and contexts.

The participants encounter a staggering variety of situations, modes in which they do reference, people they interact with, and questions they face. As has already been mentioned in relation to the user's influence over the interaction, participants serve a wide variety of users; all of them mention undergraduate students, graduate students, and faculty as possible users, while Dave also mentions members of the non-academic community. In addition to academic status, users can vary by skill level, level of intellectual sophistication, or personality. This variation among users strongly affects the interaction, changing the "tenor" and "responsibility of the librarian" (Scott).

Participants also conduct reference work in a variety of locations, including the reference desk, their offices, and "house calls" to faculty offices (Alex). According to Alex, the "geography" of the space in which he works affects the kinds of users he interacts with and the kinds of questions he gets. Likewise, participants provide reference service through a variety of delivery modes: in person, by phone, by email, and by text chat. These different modes certainly affect the participants' experiences of the interaction, but their experiences are not uniform. For example, reference interactions through instant messaging are described as "limited somehow" (Dave), but also allowing for "more leeway" with the user "willing to engage" (Melinda). Interactions at the reference desk are similarly considered "fleeting" by Scott, but according to Dave they allow for more interaction.

In addition to variety due to location and mode of delivery, participants view their work as falling into two distinct categories: general reference work and subject-specific reference work. This second category is called by various names, including "expert

consultancy" (Alex), and "liaison" (Melinda). Scott describes the general reference category as "education," and Alex similarly notes that it requires "general common sense understanding of librarianship and the resources the library provides." While this kind of reference could seem easier because it is "general" and involves "common sense," it can actually be harder because the range of subjects is so broad. Participants have to be familiar with "the whole spectrum" of subject areas (Jake).

By contrast, subject-specific reference features a wider range of possible activities (Kate, Scott), and as Scott says there might be "a suite of things that we can do as subject librarians." Scott also describes general reference as "a collaborative service that we all contribute to" as opposed to the more personal and individual responsibilities of subject-specific reference, a perspective the other participants seem to share. For instance, as mentioned earlier participants identify closely with users in their subject areas, referring to them with possessive phrases such as "my clientele" (Alex) and "my people" (Melinda). Not all participants (e.g. Mark and Sophy) identify strongly with their subject specialist role, but they all clearly delineate between these two types of reference work.

Jake, though, perceives another categorical distinction in what he calls "bibliographic verification." By bibliographic verification, Jake seems to mean the painstaking, and sometimes fruitless, process of investigating incomplete, misleading or cryptic citations, so that the user can actually locate the desired item. He claims that "bibliographic verification…[is] mostly what we have to offer anyway, more than subject expertise." So Jake identifies with a reference function, rather than a subject function, although this reference function is still highly specialized and not at all "general."

The subject specific role contributes both to a sense of variety and ambiguity in the work and to the participants' sense of professional identity, and we will return to it later in terms of the latter. It fits here, though, because it contributes to the variety and ambiguity of the work: in addition to variation by user, location, and mode of delivery, participants have a dual role. And both their purpose and their actions can be determined by their role as a subject specialist.

Multiple purposes for the interaction.

While some of the variety in reference work is due simply to the variety of users and contexts, the work is also characterized by a variety of purposes-- a situation compounded by an uncertainty about which purpose may drive any given interaction. Although several participants mention trying to work an instructional purpose into their work (Kate, Sophy), none indicated that a single, clear, and predetermined purpose guides their work in all cases. Participants instead articulate a number of possible purposes for their work, including providing some sort of useful product or answer, teaching the user something or helping them to developing a more sophisticated understanding of their research, leaving them in a more positive mental and emotional state, and saving the user's time. Sometimes interactions have multiple clear goals. Sometimes goals vary "depending on what the user needs or wants" (Dave), "on the task" (Mark), or "on the person asking" (Mark). Scott summarizes this idea when he states: "I guess, what I think important depends on what they need. So I guess I don't have this fixed idea of what should happen in a reference interaction."

Providing an "answer" to a user's question is one key purpose. However, this term "answer" is ambiguous. Participants seem to use it in a casual way, as if it is a

jargon term that does not convey its literal meaning. So, in this context an *answer* is probably not a fact (Scott, Sophy) but is some kind of "deliverable" or "product" (Sophy). It may be a literal answer, or it may be a way to get the answer (Jake, Melinda). Regardless of exactly how each participant defines the word "answer", it is important to all of them that some "deliverable" or something useful is provided. As Mark says, "you can't always have an answer, but you can always not have nothing," or as Melinda suggests, librarians can give "a reason why there isn't an answer."

For most participants, user learning is another important professional goal, although sometimes they are not able to act on it. Alex calls reference work "a teaching opportunity," and Sophy defines it as "customized user-centered, user-initiated instruction." Scott expresses the importance of the teaching component of reference work in this way:

> But I think for me the things that are most ultimately satisfying are the things where the finding wasn't the hard part. It was the teaching that was the hard part. And, kind of communicating a lot of information and ideas to someone. I think that may be the most, most satisfying.

Importantly, the participants do not conceptualize instruction in reference work as teaching information literacy skills or steps in a process. Rather, most participants define it in a more holistic manner. For example, Kate expresses her desired outcome in this way: "hopefully they walk away with a better understanding rather than just an answer." Both Mark and Sophy refer to the user's "mental model." Mark says, "their mental model might be wrong. And so that's really what you're fixing more than just pointing them to the thing"; likewise, Sophy says, "you've just shifted their mental model a little bit, or made them think about something a new way." Kate articulates a constructivist approach

to reference work as she describes encouraging users "to put those steps together in a logical way in whatever makes sense for them."

Several participants mention a refocusing from the specific and concrete question to the larger research process. Mark emphasizes teaching users that "it's like a process rather than just like a task that takes a few seconds." Kate values "engaging them intellectually rather than just producing." Two participants describe the optimal result of reference instruction as a sort of user epiphany. For example, Alex says "it was like a miracle for her [the user]" and "she slowly transforms herself." Mark says, "it's a different world for him now" and Scott phrases it as "a whole world has opened up to them." In addition to being an important component of reference work, instruction seems also to be deeply satisfying for the participants. Of course, some participants acknowledge that instruction is not always possible, for example if the user is not receptive (e.g., Sophy) or if there is not enough time (Jake). And Jake admits, "I've probably been guilty of it, too, is that you're wanting to teach them everything."

For some participants, a positive experience or a good feeling about the interaction is an end goal of reference work. This concept relates to the subtheme *managing user feelings and expectations*. Participants want users to feel comfortable (Dave, Mark) and "happy" (Mark). Both Mark and Sophy try to bolster users' confidence. Sophy has thought extensively about this concept, which she terms "assurance." A final purpose, which is strongly expressed by two participants, is helping users to work more efficiently. In fact, the idea of being helpful and useful, which will be discussed later with the related subtheme *joy of helping*, is strong among all the participants. Alex states that "most of the work I do as a reference librarian is saving the

time of the user," and he is concerned about users wasting their time. Dave likewise points out that "the primary purpose… is to help them find the materials that they need in a pretty efficient way so that their scholarly product is better."

The variety of possible purposes for the reference interaction may be due to the multiple needs of each user. Dave conceptualized this idea by contrasting technical or mechanical needs, such as using citation management software, with intellectual or scholarly needs, such as finding support for an argument. Dave feels that these needs can be in conflict: "the technology questions have gotten so big somehow or another. They have to sort of go past those to get to what the intellectual problems are sometimes." Although this way of conceptualizing needs is unique to Dave, it may contribute to overall ambiguity about user needs and the goal of the reference interaction. As mentioned at the outset of this section, user needs may determine the purpose of the interaction, and until these needs are clear, the purpose of the interaction will be unclear. Yet despite this initial ambiguity, it is clear that there are many possible goals and outcomes for a reference interaction, and not just one singular purpose. In general, however, this variety and uncertainty is not a great source of stress. It seems accepted as part of the job and is sometimes a positive aspect, a source of excitement and satisfaction.

Fully Engaged Practice

Another theme that emerged from the data is how engaged the participants are in their practice. Although the participants self-selected as "actively engaged in reference work" to be included in the study, the statements and stories they offer reveal an extraordinary engagement, perhaps a passion, for the work. This engagement manifests

itself in serious effort, total immersion in each interaction, and trying to relate to the user on an intuitive level.

Effort and persistence.

For these participants, reference practice is characterized by deliberate effort and persistence. Most of the participants express both directly and indirectly how hard they and their colleagues work to help users, and how much they value persistence. Despite the importance of this effort, though, they do not always recognize or give themselves credit for their own efforts on behalf of users.

As several participants point out, putting deliberate effort into the work is an accepted and assumed part of the job. Librarians "really bend over backwards to help people" (Kate) and they "go that extra mile" (Sophy). Several participants describe specifically how one is fully engaged in the interaction. For example, Mark says, "librarians are not known for bad service and being just like, sorry, we don't know." Sophy describes reference librarians in this way: "You're being just as fully attentive as possible… to really understand and to really help … and not just kind of like gloss over it, you know?" (Sophy)

This subtheme emerged in numerous stories as participants expressed the lengths to which they will go in helping users. They express this effort in terms of how hard they work or how many different sources or strategies they use during the interaction. For example, Jake demonstrates his effort during an account of a reference interaction: "I took the… quote very seriously, and, you know, busted my butt on it and still didn't find it." Sophy says with passion: "I went on a limb for them, not on a limb, but I went – I didn't just diddle at it. I helped them. I really tried to help them as much as possible."

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Often such efforts require trying many different strategies. Nearly all participants express this theme, using phrases such as "I went all around" (Alex), "looked at everything I possibly could" (Jake), "tried everything" (Mark), and "use[d] all the information tools at my disposal" (Scott). Scott is the only participant to use the term "persistence" to articulate this effort, but it seems to be an apt way to phrase it.

Despite their direct claims that librarians expend serious effort in their work, participants do not always recognize the extent of the efforts they were making for the users. Scott describes lengthy work on a hard question as "poking around," and Jake uses the term "flailed"; however, in the their accounts they are clearly working diligently. Sophy diminishes her efforts by saying, "I'm not saying there was anything special about me, but it may have been um, she was better at explaining herself." But clearly she has just spent significant time and effort, asking probing question and providing a conceptual perspective for a desperate user, though she reduces her efforts to being "some kind of sounding board." It may simply be modesty that prevents participants from acknowledging their efforts, or they may be dismissive of their efforts because the outcome of the interaction was not what they had hoped. It could also be that they simply accept that diligence and effort is part of the job. Just as with uncertainty, participants seem accustomed to such effort and do not seem to view these situations as uncomfortable or stressful.

It is also important to think about this subtheme in relation to the earlier subtheme *user independence*. Although the participants make an extraordinary effort and are willing to go to great lengths, some participants are adamant about the limits of their effort. Kate, for example, is willing to do whatever she can up to a point, but Jake, in

contrast, persists until he has exhausted all possibilities. For most of the participants, their experience of reference work involves serious effort and persistence. Putting such effort into each interaction is an important aspect of the theme *Fully Engaged Practice*. But their perception of this effort is that it is natural and expected, without a sense of resentment. Sometimes this effort is even dismissed and not recognized by the participants. Perhaps this dismissal stems from their own expectation that persistence and effort is what reference work is about.

Immersion in an individual interaction.

Another aspect of being fully engaged in their work is the participants' preference for an experience that is deep and immersive. Several participants express a preference for "demanding" (Alex) and "deeper" (Sophy) work, and they equate deep immersion with more valuable and more interesting work. For several participants, in fact, feeling immersed in the interaction is a key part of the experience. Sophy uses a number of phrases to describe being immersed in her work, including "in the midst of their need," "in the middle of their process," "immersed," and "on the front line." The best expression of this situation, however, might be her exclamation: "I love the in-the-moment-ness of it, that the student is right there in their work."

Although this theme is strongest with Sophy, Scott also expresses a preference for "active" work rather than "passive" work. Dave also conveys the importance of the immediacy of the interaction: "This is happening now. Our interactions really are, you know… they're about the moment. This moment needs." Dave attributes a sort of urgency to each individual interaction: "every interaction is pretty charged." This idea of the importance of the individual interaction may explain why the participants make such

an extraordinary effort, as described in the preceding section. Dave sums this up with the assertion that "we need to be sure that we take it as a moment to you know, to make the interaction meaningful."

Intuition and "reading the user."

This subtheme describes a quality of the work that involves using powers of intuition or empathy to understand and work with users. Participants use sensing and intuiting to understand a specific need, to gauge their success, to identify opportunities, and to keep abreast of what is going on in their user community. This subtheme is clearly important to most of the participants; however, it is described in ill-defined and almost mysterious terms.

Jake and Sophy, for instance, describe the practice as "reading the person," while Alex uses the phrase "stay in tune." The verb "sense" is used by several participants, including Mark and Sophy, who claims, "I can sense when they're ready." Other terms used are "being more receptive" (Mark), "interpreting" (Scott), and using "empathy" (Sophy) and "instinct" (Mark). When Jake states that "you have to listen…and you have to think" is the most important thing about reference work, he seems to imply more than simply hearing. He implies that listening means understanding and that there is more to listening than simply the words. Although participants use a variety of terms, their common meaning relates to "reading the user" through powers of intuition and interpretation. While some participants had concrete strategies, such as Jake, the action is generally described in nebulous ways, such as tuning in or sensing. It is also something that improves with experience in some unspecified way.

None of the participants expressed every one of the aspects of this master theme --
application of serious effort, immersion in the interaction, and intuiting user needs – but
these aspects share a similar quality: a deliberate engagement with the individual
interaction. This quality of work demonstrates a desire to participate intensely and deeply
in each individual encounter. It echoes the values of the theme *Importance of the User*
and extends it into the participants' actual practice.

Sensations of Reference Work

This theme addresses what it feels like for the participants to do reference work.
Their accounts of their experience reveal a strong affective dimension, with subthemes
treating the elation associated with helping or being useful, delight in the intellectual
activity or in learning associated with the work, negative emotions such as anger and
frustration, and a sense of failure or loss of control.

"Joy of helping."

Alex uses the phrase "reap that joy of helping" in describing feelings about his
work. It perfectly describes the thrill that several of the participants associate with
helping users or being useful to them. The participants express strong feelings of
satisfaction and even elation as a result of their successful efforts to help users. Most of
the participants associate being useful with a strong sense of satisfaction: "I feel the
usefulness of my expertise and being a librarian" (Alex) and "I think it's most satisfying
when it's clear that the person would not be able to do this on their own" (Scott). It is
interesting to note the frequent use of the term "helping" to describe the work. The term
is vague, but seems mostly closely associated with being useful to the user in some way.

But stronger emotions than a sense of satisfaction are also expressed. For example, Alex describes some reference encounters as "interactions I get involved in from the bottom of my heart." Some participants conveyed triumph with animated voices and gestures. Mark exclaims, "then you just like, knock it out of the park. And they're like, 'Oh, wow, reference librarians are awesome!'" And Scott uses a similarly animated tone and gesture when he says, "All right, we really nailed that one! We got their question answered!" These feelings of satisfaction or elation associated with being useful to users relate to the theme of *Fully Engaged Practice*. If the participants are fully engaged in the work, it seems logical that they would react emotionally to the results of their investment.

Delight in the intellectual challenge.

The intellectual challenge, or at least the opportunity to learn, is another pleasurable and motivating aspect of reference work. Enjoyment of work is associated with interactions that are "challenging" (Jake) or unusual or unexpected (Scott, Kate). Scott expresses this positive emotion when he says: "I'm pretty good at finding those kinds of things, but any time it goes beyond that, it's, it's pretty exciting." Scott also describes the intellectual challenge as "keep[ing] the job fresh." For Melinda, it is this intellectual challenge that makes the work continually satisfying: "The thrill and intellectual challenge of the work… it's really fun and intellectually challenging and interesting… that's kind of the hook."

Interactions where the librarian learns something new are also positive. In general, learning as a component of the work is highly valued. Alex sees reference work as "an opportunity for me to learn," and Melinda finds the work "really interesting"

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because she is "always learning about things." Jake seems to revel in the puzzle-like aspect of reference work. He often uses the word "unscramble" in describing challenges. A unique aspect of his sensation is his delight with esoteric sources. He describes them as "beautiful" and "revolutionizing," expressing his awe with their power. Interestingly, no other participant specifically associates this delight with sources.

As mentioned earlier during the discussion of the subtheme *immersion in an individual interaction*, participants show a general aversion to simple questions that do not require deep thinking. Echoing the sentiments of Mark, Scott, and Sophy, Jake says: "I've always tried to serve people equally, but you know, some questions I find utterly boring, and so you try to fight yourself on that, and, and do as best you can." Overall, this subtheme expresses the sense that unusual or challenging interactions are a source of interest and excitement. While participants seem to have a tolerance or sense of humor about mundane or "boring" questions, they clearly have a preference for interactions where they have an opportunity to learn something new from their work. Like a puzzle or roller coaster, these challenging questions are the "hook" that carries them through the mundane (Melinda).

It is interesting to consider this subtheme in relation to the theme of *Variety and Uncertainty*. While one could view the uncertainty of the work as a negative factor, clearly the participants revel in a certain amount of ambiguity. Perceiving "you don't know what you're going to get" (Melinda) as a source of excitement, rather than frustration, might stem from the participants' enjoyment of intellectual challenges.

Anger, frustration and embarrassment.

Alongside "joy" and "delight," participants also share feelings of disappointment, anger, and embarrassment in association with their work. When interactions do not go well, feelings range from disappointment to fury. For example, in contrast to his expression of "joy of helping," Alex experiences a sort of disappointment of not helping: "I felt bad, bad about my inability to help him." Dave also expresses sadness and regret about an interaction where he could not help the user: "I hate that… when things like that happen" and "That was sad." Jake expresses feelings of embarrassment as well as anger, as when he "can't find a keyword and a record and that just infuriates me."

Participants are sometimes called upon to manage their feelings as an interaction degrades or in order to start fresh with a new user. Mark describes feeling trapped by an angry user: "I tried to get away because obviously she wasn't very happy with me… there was like no escape hatch." Melinda shares the challenge of re-focusing on the user in front of her after dealing with an angry user: "you have to… try to come back to… that moment and that place."

Nature of failure.

The experience of failure has its own unique sensations, including inevitability, hopelessness, and lack of control-- as well as a potential for motivation. It is important to note that one of the interview questions was directly related to a failure, so it is not surprising that failure itself came up in the discussion. What is more interesting here are the sensations associated with failure.

One aspect of failure for participants is its inevitability. It is clear that failure is an accepted part of the job. Dave declares, "I have, of course, lots of failures as a reference

librarian." Sophy jokes sarcastically about the inevitability of her failures: "Well, … let me think. It always goes perfect for *me* [laughter]." Another aspect of failure is that it is not always clearly distinguishable from success. This aspect is evident in participants' responses to my request for a success story and a failure story. Sometimes participants provided the opposite of what was asked or concluded their account in a different way than they began. What started off, for example, as a story of how a participant had failed in locating information might transform into a story of how the participant had satisfied the user's need. Jake specifically addresses this ambiguity when he says, "I've got more failures than successes. Well, it depends on how you define it." Overall, failure seems to be associated with not being able to produce a needed "answer" for a user. Mark describes failure as being "stumped" and associates it with feeling "hopeless." Failure has to do with not being able to find information or an answer, and so is associated with feelings of hopelessness.

Another aspect of failure is the fact that it may be independent of the librarian's effort or lack thereof. Several participants describe a sense that the course of an interaction is not under the librarian's control. This aspect links to the subtheme *power and influence of the user* because sometimes the librarian is not in control, but rather the user is. There is sometimes a sense for the participants that they have failed, but through no fault of their own. In recounting a failure story, Dave states, "even though, you know, that's it not my fault, literally, was not my fault."

One external influence that seems to affect failure is time constraints. Kate explains that there are "constraints to how much time you can spend." Dave uses a number of phrases referring to lack of time, including "eleventh hour," "due in three

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hours," and "under the pressure of time." Mark explains that "sometimes they're in no

rush and they'd like to learn more. Sometimes they just need those three [articles] and

it's, it's business and they just want out, you know." For Dave, success or failure might

also be simply due to luck or fate. He says, "if the stars are aligned, that works." This

lack of control aspect to failure relates to the theme *Variety and Uncertainty*. Ambiguity

seems to contribute to an overall lack of control over one's work, and participants seem

to need to be comfortable with this. As Mark asserts, "you have to be comfortable with

that idea that there's not always gonna be an answer."

A final aspect of failure is that it is not always negative -- it can be motivating.

Jakes expresses how failure keeps him interested in and motivated by his work:

> You're just not finding it. You know, and so you can, again, you can never say
> unequivocally, but um, but I guess that's part of the interest, you know, part of
> what kind of drives you is seeing if you really can find it.

Scott offers a clever phrase to describe this motivating aspect of failure: "reference

interview regret". The first aspect of "reference interview regret" is the feeling of regret:

"As soon as they walk away, thinking like, that just did not go as well as it should have. I

should have done this and all these things." Next, he is motivated to learn and to improve

his knowledge for the next encounter. Sometimes he spends more time on the question

after the user has departed:

> That's part of the job as I know it, is like, kind of – and I guess that's how you
> learn to do it in a better way next time, but just often patrons will leave, and I'll
> think like that just, that didn't go right. Or I should have done such and such
> differently. Usually they leave and I don't know why but it's just kind of
> unsatisfying. Like that didn't go quite right, and then kind of working it around in
> my head, figuring out things to do differently.

For Scott, "reference interview regret" is a normal part of his work.

The motivating aspects of failure relate to the subtheme *delight in the intellectual challenge*. Participants' love of learning and of facing a challenge may be responsible for their willingness to see failure as a motivation. Not all participants share as vivid sensations for the work as others. It appears that shorter interviews-- those with Kate, Melinda, and Scott – yield less affective content than the longer interviews. These participants may simply experience less of this affective experience, it may be that participants need to communicate more before they begin to express emotions, or it may be that the more verbose participants are the more emotionally engaged ones.

Sense of Self as Reference Professional

This theme represents the participants' sense of their identity as reference professionals. This sense of themselves affects how they perceive their experience, and in turn is changed and developed with experience. There is a strong sense from several participants that their past experience is a valuable commodity for users. Most of the participants would probably not recognize this theme as an aspect of the experience of their work. However, their sense of self as a professional seems to affect how they perceive their work and how they function. Their own development and professional identity, their sense of self in relation to other professionals, and how they engage in the profession was a subtle theme throughout their accounts of the experience of reference work.

Professional identity.

Although most participants do not overtly discuss professional identity, they talk extensively about their area of expertise, as well as their place in the profession. These concepts coalesce into a sense of who they are as a professional. Sophy, however, does

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discuss her professional identity overtly. Among numerous references to her professional identity, she says, "I like being grounded as a librarian, 'cause that's where I identify professionally." She has clearly spent time reflecting about it. But other participants also seem to have a sense of professional identity, even if they do not mention it explicitly.

A strong aspect of professional identity is participants' area of expertise. As mentioned earlier in the discussion of *varied users and contexts*, participants have a subject specialist role as well as a general reference role. This subject specialist role is closely tied with their identity as a reference professional, and their specialist expertise is a source of pride for the participants. This pride was strong in the tone of their voices as they share comments about their expertise, such as "I might be the only person who knows that one source, cause it's fairly narrow" (Jake) and "they know their research, but they don't know the tools to get at it. And like, I know those tools" (Mark). Sophy also expresses pride in her expertise: "I realized I'm kind of an expert in some stuff, you know? And that was really satisfying. That's when I really started feeling I could give back and mentor other people and really got into that."

This expertise can also be a source of power or control. For Jake, his specialized knowledge gives him power. He refers to knowledge of esoteric sources as "part of your arsenal." Jake, in particular, uses a lot of specialized jargon. While this could simply be his manner of speaking to someone familiar with reference work, it seems at times to bolster his sense of professional identity – to be able to speak about things in a specialized way. Phrases such as "it was all index load" and "if you got the analytic, you wouldn't get the series entry or vice versa kind of thing" would be completely unintelligible for non-experts.

Another aspect of the participants' sense of self as professionals was their sense of their place in the larger profession of librarianship. They champion advocacy for professional causes and for improving the image of the profession. For example, Alex insists that a reference librarian must "be an advocate for the library" and focus on "promotion of work, promotion of libraries and their goals, and a redefinition of ourselves." Mark also discusses the advocate role: "the important thing is to be sort of an advocate for like, it's not that easy, like research is different than just Googling stuff" and "so you sort of become an advocate for better tools and better searching techniques."

Some participants also express concern for the public image of the profession. Dave expresses concern about a user's misperception of the reference librarian's role as a clerk: "I really don't think that's what we do, but it is a perception." Alex also expresses concern about user's misperception, saying "they only see libraries as facilities that hold information, hold data. And that's what's scary to me." Dave is also concerned about the "messages" that librarians send to users with their behavior and how this can lead to misperceptions about what librarians have to offer.

For some participants, their sense of self as a professional is seen in opposition to others. The idea that other professionals may make different choices or have different values surfaces in some of their comments. For example, Sophy says hesitantly, "and I don't know what other people would say about reference," and Jake says, "I don't know if anyone else in the department would do that." In discussing variations in her colleagues' choices at the service point, Kate says that it "depends on personalities and perhaps resources as to how much time people can devote to certain individuals."

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Dave, in particular, divides reference librarians into two distinct categories: those who are concerned with academic and intellectual issues of reference work versus those who are concerned with technology or management issues: "I think we've, we've attracted a different cohort – people – you know. Sometimes more into technology and the management aspects than they are interested in academic aspects." Dave describes this division as "a conflict of cultures." Jake's sense of separateness from some other reference librarians is not related to culture conflict but rather to his reverence for their phenomenal expertise, describing them as "almost legendary" and "scary." Jake is the only participant to refer to other librarians in this reverential manner. The others, however, do recognize the value of collegial differences. Dave feels that reference work is improved by "multiple perspectives," noting that "you learn from each other." Similarly, Jake expresses dependence on colleagues for their expertise in areas where he is not an expert.

Power of experience.

Experience and how it changes and improves practice is a major theme for some participants. Several participants talk about how present practice is affected by past experience. Mark claims that "you…get a better sense of like how to answer questions the more you're doing it," and Jake states "hopefully your experience of years that you bring to bear helps you with it." Sophy describes how past experience helps her understand users:

> The longer I do it, also, the less I feel like I – or the, the more I go on, I think, I realize that I'm truly understanding them as a more complex – they're in a more complex situation than I probably used to think of them being in.

Mark also expresses the importance of continuous practice, even for an experienced professional. He claimed that "the more you practice it, the better you get at it" and "you can't really do good at it unless you continue to do it at least a little bit."

Past experience contributes to current practice in various ways. Several participants refer to a "repertoire" (Jake, Sophy), and Jake also calls it an "experience bank." Some participants describe it as looking for patterns in one's experience to help deal with the present situation. Sophy uses the words "patterns" and "templates" to describe this phenomenon. Dave seems to describe a process of profiling, although he cautions that it is important to test this profiling constantly against the reality of the situation. This idea of noting what distinguishes any given interaction from another is also articulated by Sophy: "there's some unknown aspect to it. But there will be also some elements of familiarity. So you're pulling off of those, the familiar, and you're trying to figure out what's unique about this case." Scott similarly describes his repertoire as a prioritized list of sources:

> In approaching the problem, it's like, we'll try this first and then we'll try – like in order of ease or likelihood of success. And then maybe the next time you bump up the tenth thing on the list 'cause that's where you found it. So then that maybe comes a more preferred resource in that list of things to try.

Not all participants who discuss experience mention such specific strategies, though. Mark, for example, thinks of experience as simply giving him better "instinct" about interactions: "I kind of know what I'm gonna find and I just sort of have this instinct I guess from experience."

The importance of learning as a developmental activity in improving practice and developing as a professional is important. Love of learning has already been discussed above with the subtheme *delight in the intellectual challenge*. But beyond simply

enjoying the pleasure of learning, some participants explain how it contributes to professional development. Alex sees it as a "professional mandate, to keep on learning… to equip ourselves to help." Several participants mention reflection as an important part of practice. Reflection seems important as it contributes to change in practice: "[it] helped me to think about some of my work in a different manner" (Alex). Jake keeps copies of previous interactions that he was not able to answer and periodically goes through them:

> It's also helpful to kind of look at your thought process at the time. Cause if you did it today, good God, you know, you'd probably, no guarantee that you'd do the same thing. Or you'd make the same mistakes maybe. I don't know. It's hard, you know, it's hard to say.

Sophy, perhaps the participant most expressive and articulate about her professional development, clarifies that experience is not just important, but that it changes how she approaches her work, and changes her perspective. She described feeling more comfortable with her work and being better able to explain things to users. She makes a number of comments about this concept, most notably "I feel like I'm always evolving as a professional."

Changes in the experience over time.

Although change in reference is not a major theme in the current study, change in experience over time does surface and seems important in describing experience. Kate views reference work as being "in a transition time" and "not static." Melinda also sees this continuous change and admits that "it's hard to put a finger on what it is right now." Jake comments:

> I used to think there was a period of change when I got into it and things would calm down. And of course that's [Laughter] only increased exponentially. So, uh, so much for no change… The job has changed, you know, as you'd imagine,… enormously.

The change is often described as positive and is welcomed both by the participants and others. Sophy sees it as "an opportunity for us to think outside the traditional sort of roles of what librarians are." Dave insists that librarians today embrace change. He says:

> I can't think of any of the libraries around here in which we haven't, the academic libraries, we haven't got rid of the people who are not gonna change. That's sort of, that's a straw man to say that librarians are not interested in embracing change. I don't think there are any examples of that.

However, comfort with change doesn't necessarily mean that librarians know exactly what the future of reference work holds. The theme of *Variety and Uncertainty* described the need for reference librarians to be comfortable with uncertainty in daily work, but it seems to be a long-term need, as well. Melinda expresses this sense of uncertainty about the direction of reference work: "I really do… feel like we're all… asking, what is… public service in libraries? What is reference in libraries? What's happ--… where are we going? What does it all mean?"

Scott and Dave specifically contrast contemporary reference work with the ready reference and the "gatekeeper function" of the past. Scott describes user needs of the past as "needing a piece of information and the librarian would have resources and they would go and find that piece of information. We're not doing much of that anymore. We're not finding the population of Zimbabwe anymore. That's not what we're doing." In addition to decreased emphasis on ready reference work, other changes include adding additional responsibilities to the sphere of reference work (Dave, Scott), including more tasks at the reference service point (Jake), more demanding, complicated or time-consuming questions (Jake), and increased reliance on colleagues' expertise (Jake).

A number of factors come together to create a sense of self as a professional. Reference librarians have a professional identity which they may express explicitly or implicitly. Factors contributing to this identity include expertise, a sense of their place in the profession and in reference to other colleagues, and the image others have of them. An important aspect of their professional identity is how it has changed and developed as they gained experience. A final factor is the sense of how the work has changed over time.

Conclusion

The master themes that emerged from the analysis provide an overall sense of reference work as experienced by these participants. *Importance of the User* conveys the most important factor in the reference interaction: the user. *Variety and Uncertainty* expresses the extreme diversity of the work and the sense of uncertainty and ambiguity that pervade the experience. *Fully Engaged Practice* expresses the participants' preference for deep, challenging and intense engagement in the work. *Sensations of Reference Work* characterizes the wide range of emotions experience by participants. And finally, *Sense of Self as Reference Professional* conveys how the present experience relates to past experience.

CHAPTER 5:

DISCUSSION

This study aimed to understand the experience of library reference work from the practitioner perspective. As a result of an interpretive phenomenological analysis (IPA) of the thoughts, feelings and attitudes of eight academic research librarians, five themes for the experience of reference work emerged from the data. These themes support some existing models of reference work, but also extend this research into new areas. Overall, the findings from this study may be an initial step in developing a framework to understand and study the experience of reference work. They suggest some specific considerations for reference practice, as well as for education of reference professionals. Finally, this study's success demonstrates the viability of IPA as a method for studying experience in LIS.

The Experience of Reference Work for Librarians in Academic Research Libraries

The study finds that five themes characterize the experience of reference work for the participating academic research librarians: Importance of the User, Variety and Uncertainty, Fully Engaged Practice, Sensations of Reference Work, and Sense of Self of as Reference Professional. Although these themes do appear in existing research and some models of the reference interaction, they have not previously been used together to describe the experience of reference work.

Importance of the user.

The most important theme for the experience of reference work in this study is the Importance of the User. This theme expresses the centrality of the user in reference work, the importance of relationships with users, the strong influence of the user's behavior and characteristics on the interaction, and the experience of managing the user's affective experience.

Though not a startling finding, it reinforces the place of the user at the center of the reference interaction, supporting the general trend in LIS toward user-centric rather than system-centric practice. Previous studies have also noted the importance of the user. For example, value studies found that service to users was important to librarians (e.g., Koehler, Hurych, Dole, & Wall, 2000), and other studies, such as Gerlich (2006) found that "helping the user" was a source of satisfaction. In the current study, however, the importance of the user clearly dominates the interaction. Burns and Bossaller (in press) also found evidence of this dominance: "the shared essence that emerged… involved the participants' relationship with users" (Essence of Communication Overload section, para. 1). The similar results from these exploratory phenomenological studies lends credibility to the supposition that the user holds a central focus in the experience of reference work for academic librarians.

The current study supports -- to an extent -- the basic model of the reference interaction as being composed of three components: user, librarian, and source. All three components influence reference work, but the practitioners who participated in this study clearly considered the user as the most important component of the model. The librarian component, while not emphasized by participants, clearly has an influence on the work in

terms of expertise and conscious effort, but the source component has no serious impact on the experience. It is not that sources hold no importance for the participants in this study. A clear source of the participants' sense of value to users is their knowledge of tools; especially for Jake, the intricacy and power of sources are also important. For this group of librarians, then, sources play a role, but not as great a role as the balanced model suggests.

It is possible that the importance of sources on the work is de-emphasized for this group because sources have become second nature in the work of such experienced participants. On the other hand, the participants' claim that reference work is not "ready reference" work as it once was, but involves more research and discussion with users, suggests that the changing nature of reference work may have rebalanced the older models. Whatever the explanation, though, the important consideration is that the three-component model may be accurate in its components, but not necessarily in its emphasis.

An updated librarian/user/source model proposed by Agosto, Rozaklis, MacDonald, and Abels (2011) includes an important enhancement relevant to this theme. This updated model depicts a more active user, one who searches independently and who contributes to development of sources. This more active user reflects the participants' view of the user as having a strong influence on the work and affecting the direction of it. On the other hand, Crum's (1969) model for the reference interaction in the special library environment may more accurately reflect this study's participants' experience of reference work. His model depicts reference work mainly as an interaction between librarian and user, including librarian influences (e.g. organization, the profession, skills, and frames of reference) and user influences (e.g. work group, profession, information

behavior, and frames of reference) (p. 271). This communication approach seems more in tune with the perspective of the participants in this study, although it does not address all aspects of their experience.

The finding that connecting with users and forming relationships with them is important also echoes Radford's (1999, 2006) and Radford and Connaway's (2009) work emphasizing the importance of the interpersonal dimension of the reference interaction. These studies of reference behaviors and the current study focusing on the experience of the practitioner both identify relationship building as important in reference work. While Radford and Connaway's work shows how relationship-building behaviors affect success, though, the current study explores how the librarian thinks and feels about those behaviors.

In particular, one finding that emerged from the study is the relative importance of a librarian's subject "clientele" over the general pool of users. Although the importance of relationship-building for subject specialists has been widely discussed, the only discussion of a special relationship between a librarian and his or her "clientele" appears in Fairbrother's (1998) study of special librarians. Fairbrother reports that "the professionals in my field environment appear to maintain different types of working relationship with different categories of service users" and suggests that further research is necessary (p. 136).

Variety and uncertainty.

Secondly, the current study finds that an overall sense of variety and uncertainty pervades the experience of reference work for the participants. The variety of users and user needs, along with the variety of locations and modes of delivery, demands

nimbleness and diverse skills. In addition, the variety of purposes for the interaction, coupled with the fact that the ultimate purpose for any given interaction is not known at the outset, creates even more uncertainty for the librarian to cope with.

This finding supports a recent phenomenological study of academic reference librarians with similar results. Burns and Bossaller (in press) were surprised by the complexity of the work environment that their participants described: "a confusing and unstable landscape" featuring "an experience much more varied and intricate than imagined before the study" (Composite Structural Description section, para. 1). The similar findings that emerged from these two studies lend some credibility to the supposition that the context for reference work in academic libraries is varied, complex, and uncertain. This finding also supports the updated librarian/user/source model proposed by Agosto et al. (2011): their inclusion of a variety of modes of delivery and a variety of types of sources is definitely confirmed by the current study.

The finding pertaining to the multiple purposes for the reference interaction may explain why the debate on the topic of purpose has continued in the literature. The various purposes for reference interactions, as revealed by participants in the current study, parallel those discussed in the literature. *Providing an answer or a plan for an answer* and *instructing the user* are the main purposes debated in the literature, and were strong and important purposes in this study. However, while the literature also includes *communicating* and *building relationships* as interaction purposes, here the participants instead associated them with intense experience with the user.

Two other purposes that are not widely discussed in the literature but that emerged in this study are *providing a positive user experience* and *saving the user's time*.

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The user experience in reference work is drawing increased attention, as evidenced by its prominence at the most recent Reference Renaissance conference (Radford, 2012). How the user perceives the overall experience of the reference encounter merits more research. Saving the user's time was not an important purpose for all participants, but it was important for some of them. Indeed, "saving the time of the user" is Ranganathan's fourth law of library science (Ranganathan, 1940, p. 56), and has a long history of importance for reference services. One of the participants acknowledged that he frequently reflects on Ranganathan's laws and finds them relevant to his practice. However, Ranganathan's work is not a staple of the typical reference syllabus. Although most of the literature on reference work focuses on providing information and instructing users, these additional purposes merit more discussion and research.

The current study also supports some aspects of the content/relational model developed by Radford and Connaway (2009). Overall, the current study supports the multiple purposes aspect of the content/relational model. Both *answering the question or providing a deliverable* (content) and *ensuring a good user experience* (relational) were found to be important purposes in the current study. In addition, the importance of relationship building was found to be key, although as mentioned above the participants tend to view it as an aspect of their focus on the user, not as a purpose of the interaction. Both the Radford and Connaway model and the findings of the current study support the notion that multiple purposes come into play in any given interaction. On the other hand, the current study also suggests that the experience of reference work from the practitioner perspective may be more complicated than the early model indicates.

The study of the artifacts of reference work may not provide the entire picture of experience from the practitioner perspective. It does not include all of the purposes mentioned by the participants, or present them in the same manner. Similarly, the participants identify similar purposes to Radford and Connaway (2009), but they are not always articulated as clearly. The participants' intentions at the outset are not necessarily to provide content and to behave interpersonally; rather their intentions are less clear and certain. As the interaction unfolds and as the user exerts his or her pressures on the interaction, then some purpose emerges. It is this purpose manifested in practice that Radford and Connaway observe. Knowing that this purpose emerges from a place of uncertainty is perhaps useful in understanding the pressures that librarians face in their work. It may also be useful in preparing and guiding pre-service and novice professionals. Knowing that it is normal to be uncertain can be reassuring to novice professions and may help to relieve initial uncertainty.

It is important to remember that the results of this study are not generalizable: perhaps only this small group perceives the purpose of reference in this way. It may also be that this emphasis on multiple and variable purposes is only applicable in the academic research library context. Moreover, in this study the participants were actively engaged in reference work at large, well-funded libraries. It is possible that a positive outlook on their work causes them to be willing to entertain and able to handle more roles. Radford and Connaway's research, however, which is large scale and covers multiple library environments, would seem to indicate that a single purpose is generally not supported.

A possible interpretation for the ambiguity in purpose of reference work comes from Schön's (1983) study of reflective practice. Schön describes professional work as

occurring in ambiguous situations where problems are not clear or easily understood. According to Schön, a practitioner "frame[s]" the problem – he or she "is willing to step into the problematic situation, to impose a frame on it," but also remains open to a reinterpretation of the problem or the "situation's back-talk" (p. 269). This interpretation of professional work may explain why a reference interaction sometimes takes an unintended course or the librarian feels out of control: by being open to "reframing" the reference interaction, participants would thus sense the change and be willing to follow the new course.

The current study begins to address the significant question about the purpose of reference work from the practitioner perspective. A long-standing and argumentative debate in the literature concerns the proper function of reference work: whether it should be information provision, instruction, relationship building, or some other purpose. One anticipated outcome of this study was insight into the proper role of reference work from these participants' perspectives. In fact, the study demonstrated that participants see multiple roles for any given interaction, that these roles vary between interactions, and that it is not necessarily clear at the outset of an interaction what its purpose will be. This degree of complexity in purpose is not addressed by the debate in the literature. It does however explain why the debate continued –because purpose is not straightforward.

If reference work is reframed as an activity having multiple purposes, then more research is needed into how these purposes interrelate. The current study suggests, as noted above, that the main purpose or purposes for the interaction are not decided by the librarian at the outset, but rather emerge as the interaction progresses. Some participants demonstrated a preference for a particular purpose, namely instruction, and they tried to

incorporate it into their reference work. However, other factors beyond librarian preference seemed to affect the ultimate purpose, including user needs, user status, user skill, user sophistication, and the amount of time. It is not clear from this study how the purpose is determined, though Schön's "problem setting" may provide a useful context for further research.

Another important aspect of these multiple purposes is that the study does not show any disconnect between reference work and instruction. Some participants clearly distinguished between providing an answer and instructing users. These two purposes were sometimes mutually exclusive, but other times they were interwoven into an overall concept of reference work. For one participant they were even synonymous. Within this context of the academic research library, one-on-one instruction was not fundamentally separate from reference work. This finding is in opposition to Burns and Bossaller (in press), who found that "librarians implicitly described and told stories about themselves that identified them as instructors rather than as reference librarians" (Instruction not Reference section, para. 2), though none of the quotes Burns & Bossaller offer suggest that instruction is diametrically opposed to reference.

Fully engaged practice.

The current study also reveals a dimension of reference work termed *Fully Engaged Practice*. This theme conveys the participants' serious effort and persistence, their desire for deep immersion in the interaction, and their efforts to connect with users on an empathetic and intuitive level. To be eligible for the study, participants had to meet the inclusion criteria of being "actively engaged in reference work." The intention of this phrase was to recruit participants who actually did reference work as part of their jobs

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and who continued to be interested in the work. So this theme does not pertain to whether or not participants are engaged, but rather how they are engaged or what this active engagement looks like.

Although there have been no studies specifically of the role of effort and persistence in reference work, similar concepts surfaced in studies of the characteristics of good reference librarians. Persistence was found to be an important characteristic (Bronstein, 2011, p. 804; DeVries & Rodkewich, 1998, p. 206-210), as was "perseverance" (Wyer, 1930, p. 235-238). Other studies have claimed that good reference librarians are "proactive" (Borman & McKenzie, 2005, p. 143) and an "exhaustive searcher" (Quinn, 1994, p. 173). Along similar lines, the finding of the importance of effort in reference work supports Gerlich's (2006) Reference Effort Assessment (READ) scale, an instrument that measures the quality of reference service by the amount of effort put into it (see also Gerlich & Berard, 2010). In both the current study and Gerlich's work, effort is highly valued by practitioners and is perceived by them as evidence of good work.

This finding also supports other studies and essays that discuss the role of empathy in reference work. Often empathy is treated as a factor in communication, but here it goes beyond basic communication. The participants wanted to connect with users and to really understand them. "Reading the user" was viewed not simply as an act of communication, but as a specialized skill, honed with experience. Studies of characteristics of good librarians have included similar qualities. These qualities include empathy (Bronstein, 2011, p. 798; DeVries & Rodkewich, 1998, p. 206-210), "intuitive" (DeVries & Rodkewich, 1998, p. 206-210), "sensitive" (Borman & McKenzie, 2005, p.

143), a "good listener" (Quinn, 1994, p. 173), and having an "interest in people" (Wyer, 1930, p. 235-238).

A concept related to this theme, as well as to *Importance of the User*, is emotional intelligence, which was proposed by Eidson (2000) as a possible framework for improving reference work. The emotional intelligence framework includes personal competence (self-awareness and self-management) and social competence (social awareness, which includes empathy, and relationship management) (Goleman, Boyatzis, & McKee, 2002, p. 39). The current study lends support to Eidson's argument. The participants' narratives feature all of these components, though distributed across various themes.

The attitude toward work characterized by this theme is surprising in its passion and commitment, and supports the idea of reference work as a "calling" (Bunge, 1984; Burns and Bossaller, in press; Lasocki, 2000). It would be interesting to investigate how pervasive this view of reference work as a "calling" is and how this perspective affects practice. This emphasis among the participants raises the question of what reference practice looks like when it is *not* "fully engaged." Are effort and persistence, immersion, and intuition evident to some degree in the practice of all reference librarians, or only those who are "fully engaged"? Should these aspects of reference work be considered basic standards of practice or ideals to strive for? This theme also suggests the inadequacy of focusing solely on skills and competencies in preparing or evaluating reference librarians. All of these experienced participants had reference skills, but they also had an attitude of engagement that clearly made a huge impact on their work. More

research is needed to understand the impact of attitude on practice, and how it relates to skills and competencies.

Sensations of reference work.

Related to this engaged passion, the current study reveals a strong affective dimension to reference work. Sensations range from elation about helping or being useful and delight with the intellectual challenges of the work to negative feelings such as anger, frustration, embarrassment, hopelessness, and lack of control.

Other studies have certainly found that being useful to users is important to reference librarians. This is reflected in the value studies that show a decided service orientation for librarians (see Koehler, Hurych, Dole, & Wall, 2000, for example). Burns and Bossaller (in press) reported that librarians had "deep feelings" about being useful to users (Self Impact section, para. 4). Affective dimensions of library work have likewise been explored. Matteson and Miller (under review) used emotional labor theory to study library work in general, and Julien and Genuis (2009) studied the affective aspects of instructional work. However, the affective dimensions of reference work in particular, including the range of emotions experienced by practitioners and how they affect practice, have not been studied.

Another aspect of this theme is the importance of intellectual stimulation. Similar findings have emerged in other studies, as well. Both Wyer (1930, p. 235-238) and DeVries and Rodkewich (1996, p. 206-210) identified curiosity as an important characteristic of good reference librarians. Watson-Boone (1998) found that sources of satisfaction for her participants included "mind puzzles" and "challenges" (p. 32). Burns and Bossaller (in press) found that librarians appreciated the "thrill of the search" (Self

Impact section, para. 4). There may be a relationship between the level of engagement that librarians have about the work and their intensity of feelings about it. Extremes of emotion, from elation at being useful to helplessness at being unable to be useful, may result from the intense engagement experienced by these participants.

The current study also yields interesting information about the nature of failure and its results. Feelings of inevitability, helplessness, and lack of control are associated with failing to help a user to the extent the librarian would like. However, failure has a clear motivating effect, captured by Scott's phrase "reference interview regret," a concept that merits deeper investigation.

Sense of self as reference professional.

In expressing their experience, participants voiced a sense of themselves as reference professionals. They developed a professional identity based on their expertise, particularly in their subject specialty, and on their place in the profession and in relation to other professionals. Also, participants revealed that their current practice is affected by their past experiences and changes over time, though their professional identity was not a component of experience per se. The literature does not address professional identity associated specifically with reference work, but there is some discussion of professional identity associated with librarianship in general and with academic librarianship in particular.

One concept explored in the literature on professional identity for librarianship in general is the distinction between defining professional work through skills and competencies and defining it through a body of professional knowledge. There have been a number of attempts to specify important skills and competencies for reference work,

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including the Reference and User Services Association's (2003) *Professional*

Competencies for Reference and User Services Librarians and Luo's (2007) research on

competencies for virtual reference. However, Broady-Preston (2010) observes that other

professions have moved from these checklists of skills to the body of professional

knowledge approach, and recommends that librarianship does the same. She recommends

refocusing from " 'can do' lists" to "conceptual knowledge" (p. 71). In the current study,

the participants talked less in terms of specific skills and more about a nebulous

"expertise" they developed based on their past experience. According to the participants,

this knowledge changes over time, and they make a deliberate effort to expand it.

Another issue in the literature on professional identity for librarians is the lack of

identification with the profession, replaced by a focus on service or identification with the

organization. Broady-Preston (2010) and Wilson and Halpern (2006) found that academic

librarians did not have a strong sense of being a professional, but rather had a

commitment to service: "service provided *within the context of the supporting*

organization as opposed to an allegiance to the profession of librarianship" (Wilson &

Halpern, p. 87-88). This quote also highlights the conflict between identification with the

organization and identification with the profession. On the other hand, McAbee and

Graham's (2005) study of subject specialists in academic libraries contradicts this

finding, as their respondents identified with the profession rather than their employer (p.

24). The current study adds support to the notion of focusing on the user rather than on

one's individual accomplishments as a librarian. However, it contradicts this notion, as

well, as participants seemed to have a professional identity built on their expertise.

Perhaps an identity as a reference professional incorporates these two ideas –participants

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identify with serving the user and with reference practice. In the current study, there was little mention of the organization and its influence on the participants' professional work. Although participants clearly see that others in their organization may practice reference differently and there were a few mild critiques of decisions made at higher levels, at no time was there a sense that participants were speaking for their department or their organization. Rather, there was the sense only that about the individual's practice. This suggests that the participants in this study identified not with the organization but with being independent professionals.

Another perspective for understanding this conflict in professional identity might be Gouldner's (1957) theory of cosmopolitan and local latent social roles. This approach has not been used to study library and information science professionals, but has been mentioned several times by White (1991, 1997, 2000). He views the distinction between cosmopolitans and locals as fundamental to building a sense of professionalism among reference librarians and to finding relief from more clerical responsibilities (2000, p. 352). A related study by Carson, Carson, Roe, Birkenmeier, and Phillips (1999), that uses a model of organizational commitment and career commitment, rather than Gouldner's theory, found that medical librarians with dual commitment to the organization and to their career had higher job satisfaction and career satisfaction and lower career withdrawal intentions (p. 9). Since the few studies of librarians' commitment to their profession in relation to their commitment to their organization show conflicting results, more research in this area might be useful and help to illuminate aspects of reference librarians' professional identity.

Both Broady-Preston (2010) and Wilson and Halpern (2006) discuss a de-emphasis on traditional library skills and a greater emphasis on generic management or information skills. This is an interesting discussion in light of Dave's distinction between the academic/scholarly type of reference librarian and the assessment/management type. The current study suggests that participants value an expertise associated with traditional reference work, and that they use their "academic/scholarly" expertise in their work. Dave's distinction is similar to Sundin, Limberg, and Lundh's (2008) themes of librarian expertise. Dave's academic/scholarly type might be similar to "information searching" and "source evaluation" expertise, and his assessment/management type might be similar to "technical-administrative" expertise. Perhaps what he perceives as different types of librarians could also be viewed as librarians emphasizing different areas of their expertise.

Although there are no studies that examine professional identity and reference work, Walter (2008) studied the development of a "teacher identity" in academic librarians. Presumably many of respondents also did reference work. Walter's study suggests that reference librarians may have many identities from which to choose.

The current study also suggests that past experience of reference work impacts current practice. Specifically, the participants attributed much of their current skill and success to years of practice, often continuous. The importance of experience on the participants' sense of expertise supports Bivens-Tatum's (2007) argument that reference work should be viewed as a phronetic activity – one that is learned through doing. Several participants in this study overtly credited their expertise to their years of

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experience. Participants who noted the positive effect of experience included both mid-career participants and those with long and diverse careers.

In addition to simply learning by doing, participants actively reflected on their experience as a means of improving their practice. They demonstrated the "reflective practice" advocated by Schön (1983). There was evidence in participants' stories of Schön's "reflection-in-action" or analyzing what is going on in a reference interaction while it is taking place (p. 54), as well as "reflection-on-action" or reflection about the work after it is over (p. 61) as in the example of Scott's "reference interview regret." Some participants in the study specifically mentioned that a process of reflective practice was important to them or that they felt that reflecting on their work led to improvement in their practice. There is some evidence of "reflection-for-action," an anticipatory reflection described by Thompson and Thompson (2008, p. 13), in which participants anticipate user needs based on user status, for example. Participants in this study more closely resemble Schön's "reflective practitioner" than his "expert" (1983, p. 300): They attempt to connect with a user's thoughts and feelings and are open to learning from the user. Clearly reflective practice was an important part of the development of these librarians' expertise and may be an important strategy for pre-service and novice professionals. Although discussed extensively in relation to information literacy instruction, reflective practice has not been widely discussed in relation to reference work.

The practitioner experience of reference work.

The five themes discussed above -- Importance of the User, Variety and Uncertainty, Fully Engaged Practice, Sensations of Reference Work, and Sense of Self as

Reference Professional -- may be a starting point for understanding and studying the experience of reference work for other librarians and in other environments. In reflecting on these themes in relation to the literature of reference work and of practitioner beliefs, this picture of experience seems to be unique. Although previous research and existing theory relate to individual themes, none bring them together in the manner revealed by the participants. Concepts such as the content/relational model, emotional labor theory, and reflective practice helped to shed light on individual themes, but not on the findings overall. Thus, for a holistic perspective on the experience of reference work, a framework such as the themes proposed by this study is necessary.

Implications of Findings

The current study has implications for theory development, reference practice, and professional education. Although the findings of this study are not generalizable and should not be used to make assumptions about the experience of reference work for all librarians, they are nevertheless useful for theorizing and may be transferable to many practice situations. At the least, the findings raise questions about current reference practices and preparation for reference and information services work.

Implications for theory development.

This study begins to respond to Crowley's (1999) call for theorizing based on reference practice. First off, the findings of this study offer a tentative framework for understanding the experience of reference work from the practitioner's perspective. Current models for reference work, such as the three-component user/librarian/source model and Radford and Connaway's content/relational model, have described reference work from an objective perspective. The current study demonstrates that these models do

not capture the full experience of reference work from the practitioner perspective, as they neglect intentional, affective, and professional dimensions of the work.

Although IPA does not feature the rigid structure of grounded theory methodology, it nevertheless provides a rigorous method for inductive theorizing from data. In this study, focusing on a homogenous group of academic research librarians reveals an interpretation of experience that may be similar to that of other librarians. At the least, it provides a more informative starting point for study and a basis for comparison. The themes discussed here, then, could form a valuable framework to describe the experience of reference work from the practitioner perspective. More study is needed to develop a more precise model for the experience of reference work, and to know the degree to which this interpretation is transferable to other environments. However, the current study provides a first step toward such a model.

Implications for practice.

Despite the exploratory nature of the current study, its findings have implications for reference practice as well. The view of the experience of reference work provided by this study can be useful to other practitioners, particularly to pre-service librarians, as they seek to understand and improve their practice. It can also provide insights or raise questions for reference and information services department managers who need innovative perspectives on challenges such as reference staffing, reference spaces, reference services, assessment of reference work, hiring of reference librarians, and managing reference librarians.

The findings of this study provide an especially useful perspective on the work for pre-service or early career librarians. The participants in the study are all experienced

librarians who are highly engaged, and seem to be satisfied with and proud of their work. Within the themes that emerged from their accounts of reference work are effective strategies for practice: focusing on the user's characteristics and needs and forming real relationships with users; taking the variety and uncertainty of the work in stride and being flexible about the outcome of the reference interaction; engaging in each individual interaction by taking the time and effort to immerse oneself in it and concentrate on the user; managing the user's (and one's own) emotions and learning from mistakes; and reflecting on one's practice, learning from experience and developing a professional identity. To some extent, all of the librarians in this study used these strategies.

An important implication for novice as well as experienced librarians is the importance of reflective practice. The findings suggest that reference work is complex and has multiple possible purposes. Although the factors that affect the ultimate purpose of the reference interaction are unclear, librarians either make choices about the course the interaction will take or respond quickly as the purpose becomes clear. A habit of reflective practice in reference work could help practitioners make conscious choices, guiding the interaction in an optimal direction. It could also help librarians to understand how failed interactions could possibly have been redirected.

Even more significant than the implications for front-line reference practice are its implications for managing reference practice. While the current study does not provide the data necessary for evidence-based decision-making, it does provide insights and perspectives that may help managers who have reached an impasse and need fresh perspectives. In particular, the study sheds some light on the continuing challenge of reference staffing and whether professional librarians should provide front-line service.

The findings of the study suggest that a balanced approach may be optimal for experienced professionals in academic research libraries. Participants preferred intellectually challenging questions, which suggests less time at the service point and more time in their offices. However, the librarians in this study also argued for the importance of working at the service point, to gain insights into challenges their clientele may face. Continued efforts to design intuitive interfaces for library tools and systems, efforts to make the organization of materials transparent to users, and more intuitive building layouts may help to alleviate some of the directional questions that participants find somewhat tedious. Likewise, setting user expectations that the service point, including the virtual reference service point, is a place where challenging questions can be asked would also help.

The findings also suggest implications for designing and arranging reference spaces. The multiple purposes for the reference interaction suggest that reference spaces need to be flexible and allow for many different kinds of librarian and user behavior. Traditional service points featuring a large reference desk may further some purposes, such as efficiency, but they may hinder others, such as instruction and a positive user experience. Thought needs to be given to how to structure space that supports all of these purposes, as well as providing an environment conducive to relationship building. Examples of optimal space decisions might include a service point designed for librarian/user cooperation, comfortable seating as a component of the service point, and large monitors or white boards near the service point for enhanced one-on-one instruction or point-of-need small group instruction. In addition, the finding that the user is the central focus of reference work supports the trend in the change of environment from

"reference rooms" full of shelves of reference books to "information commons" where abundant workstations and user-focused furnishings are the norm.

In addition to user-focused spaces, the results of the study support broadening *services* to focus on the user as well. Existing services that support relationship-building, such as "house calls," office hours, and co-teaching with faculty all seem to support the user-focus advocated by the participants in this study. In addition, they support expanding modes of reference delivery to meet user needs. Although there was no universal agreement among participants about which modes of service were preferable for rich and effective interactions between librarian and user, participants were generally positive, and not overwhelmed, by multiple modes of delivery.

Another implication for reference practice concerns assessment of reference work. The study suggests that reference interactions may have different purposes, and this fact needs to be considered when assessing reference performance. Focusing solely on accuracy of answers or on user satisfaction will miss purposes that may have played a greater role in a given interaction. Additional measures that should be considered include Gerlich's READ scale for assessment of effort, as well as criteria for relationship-building from Radford and Connaway's content/relational model. A tool for measuring user learning in the reference interaction would also be beneficial. Overall, the study suggests that any one of these measures on its own would not be suitable for measuring reference quality due to the multiple possible purposes for reference work.

The findings of the study further suggest characteristics of reference librarians that managers may want to consider in hiring decisions. While technical skills have become an increasingly important criterion for hiring, the findings support the continued

importance of people skills, including both empathy and good communication. In addition, the findings suggest that reference librarians must be able to deal with uncertainty and competing priorities, to persevere when the work is challenging, and to learn from their inevitable mistakes.

Finally, the study suggests some measures managers could take to ensure a satisfying work environment for experienced professionals. Overall, the aspects of reference work that were highly valued by participants included feeling useful to users, developing relationships with users, experiencing intellectual challenge, and developing a sense of expertise. Examples of concrete strategies that managers might take to address these desires include encouraging librarians to seek out new ways to be useful and providing feedback about these efforts; allowing for opportunities for librarians to develop deep relationships with users, such as attending faculty or student meetings, providing reference services in offices or learning spaces, and providing space in the library for the librarians' "clientele" to gather; ensuring that librarians are given the time and resources to pursue challenging questions; and recognizing the need for librarians to pursue answers to questions after an interaction has concluded. Managers also need to support professional development opportunities that encourage development of expertise in each librarian's subject area, and to encourage librarians to share their expertise with others.

Implications for professional education.

Professional education, both in terms of content and manner, can also benefit from this study's findings. Responding to recommendations in the literature that professional education should help students learn to think like professionals, reference

instructors may want to include studies like this one alongside prescriptive steps for reference behavior. Allowing students to see how experienced librarians grapple with uncertainty and respond positively to failure, for example, will add a dimension to learning about reference work that until now was available mainly through the instructor's or guest speakers' anecdotes.

The current study reveals several issues of importance to the participants. While these issues may not be generalizable to all reference situations, they do suggest some areas that should be covered in reference coursework. For example, the current study finds that for the participants, the user is the single most important component of the reference interaction, a value that should be communicated in reference education. The findings suggest that some specific areas to address may be dealing with users and negotiation, diagnosing needs, setting user expectations, and communicating and collaborating with users. Another important focus would be on dealing with variety and uncertainty. In particular, reference instructors cannot prepare future librarians for every source and every tool they will encounter on the job, so students should focus on learning how to learn. The reference course may also be a place to introduce the idea that reference work is an emotional experience, as well as an intellectual one. Discussion of how to deal with one's own emotions, as well as how to manage user emotions, would help prepare students for the affective experiences of practice.

Finally, the current study suggests that there may not be one proper purpose for reference work, but rather many purposes that reference librarians must be prepared to fulfill. Thus, focusing solely on information provision in the reference classroom, or separating information provision from instruction, for example, would not be productive.

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Rather, the variety of possible purposes for reference should all be explored. Instructors could provide examples for how these various purposes manifest themselves in the reference interaction and encourage students to examine why a librarian chose a particular direction over another. Models and examples should include all possible purposes. In addition, the importance for the participants of developing a sense of professional identity suggests that this concept should be addressed as well during professional education. Students could make significant progress in exploring and articulating their professional identity during the mentoring and reflection of graduate education. A program such as the one developed by Spruill and Benshoff (2000) for social work students could serve as a useful model. The authors propose that in Phase 1 (Personal Beliefs), students examine their own beliefs about counseling and participate in activities that help them to see other perspectives; in Phase 2 (Counseling Theories), students integrate new knowledge about formal theories with their existing personal beliefs through activities that compare formal theories and personal beliefs and interviewing practitioners; and in Phase 3 (Personal Theory of Counseling), instructors integrate questions throughout their courses that challenge student beliefs and require explanation. This program is based on a model for counselor development, but could be adapted for LIS

The findings of the current study emphasizes the importance of learning through experience, indicating that LIS programs should continue to support field experience courses and internships as components of professional education. Coupling work experiences with the thoughtful reflection characteristic of the classroom could help students get the most of the experience, and develop useful skills for future work.

Methodological Considerations

IPA is a method that has not been frequently used in LIS, so this study provides an opportunity to evaluate it. Overall, IPA was an effective method for interpreting the experience of reference work. However, there is definitely room for improvement in considering IPA as a phenomenological research method for LIS. IPA was effective as a structured procedure for extracting themes from a large amount of data. The multi-stage procedures allowed for a guided progression from data, to initial insights, to themes for individuals, and finally to themes for the group. There was still a burden on the researcher to be rigorous, thorough, and creative, but the various stages facilitated this process. As hoped, the IPA method allowed aspects of the experience that were important to the participants to emerge, rather than simply aspects of interest to the researcher. Allowing the themes to emerge in this way was a key aim of the study.

A number of challenges arose, however, in using IPA for this study. One challenge was the lack of software designed specifically for IPA analysis. In the initial planning for the study, it was hoped that existing qualitative analysis software, such as atlas.ti, could be used to facilitate analysis and presentation of results. However, these software packages are geared toward grounded theory analysis and do not support the multi-stage analysis process necessary for IPA. The current study, therefore, relied on paper-based analysis. As mentioned in the Methods chapter, manipulating themes represented on slips of paper and sticky notes perhaps aided creative thinking, but it necessitated frequent recopying and retyping. In a field like LIS where researchers clearly recognize and depend on information and communication technology to improve efficiency, this lack of specialized software may be a deterrent to widespread adoption of

IPA. Development of software specifically for IPA should be a high priority, and would also help researchers in disciplines outside LIS.

Another challenge for the current study was the lack of examples of IPA studies on LIS topics. Although a few examples exist, it was challenging to design and evaluate the study using models from other disciplines. In particular, isolating a "homogenous" sample proved challenging for a topic where groups are not clearly defined by criteria such as diagnosis with a particular disease, such as they are in health research. Similarly, using IPA without a community of researchers doing IPA in the field was difficult. Psychology and health psychology researchers in the United Kingdom, for instance, have ready access to IPA experts at monthly meetings for discussion of procedures and review of analysis. The current study may have been improved, and would certainly have progressed more quickly, with the assistance of a research discussion group with a methodological focus. Although the online discussion group and online list of experts by country were helpful, researchers using IPA for LIS topics will need to work to establish a local community of researchers. A related problem is the lack of auditors who feel comfortable working with IPA research outside their own area of specialization and lack of standardized guidelines for what an IPA audit will entail.

Finally, recognizing when a sufficient depth of interpretation had been achieved proved to be complicated. Moving from description to interpretation is a known challenge for IPA results (see Hefferon & Gil-Rodriguez, 2011), and Larkin, Watts and Clifton (2006) observed that "when's a group's voice hasn't been heard, collecting and reporting their voice can seem like enough" (p. 103). In analyzing data for the current study, the author sensed this satisfaction at having described the participants' new

perspectives, which made pushing the analysis to greater levels of interpretation more difficult.

Limitations

While the current study extends the research on reference work into the perspective of the reference service provider, it is not without limitations. Important limitations concern the characteristics of the sample, the method, the relationship between the participants and the researcher, and the influence of the researcher on the study.

First and foremost, the current study was designed to be exploratory, and studied only a small group of librarians. Had other participants been included in the study, the results may have been different. The results are not intended to be generalizable to the larger population of academic reference librarians and may not be transferable to other library environments. In addition to these caveats, a limitation to this study is the uncertainty about factors within this group that may have affected their experiences. In recruiting the participants, attempts were made to form a "homogenous" group, one that might offer perspectives on a similar experience. Although selected participants have similar positions and work in similar environments, there may be other important but unobserved characteristics that introduced heterogeneity into the group. Characteristics such as age and gender were not taken into account in forming the sample, and did not surface as characteristics that influenced the experience. The primary discipline served by a given participant was also not taken into account. However, in light of the finding that there is a strong identification with users in one's subject area, it is possible that the characteristic of discipline or specific subject area serviced affects the experience.

Another characteristic of the sample that may affect transferability of the results was the high level of engagement in the work by the participants. Participants in the study were self-selected. The recruiting email included the phrase "actively engaged in reference work" as an inclusion criterion, which was intended to select participants who currently did reference work and had enough interest to want to contribute. However, it may have contributed to selecting a group of unusually highly engaged librarians. A related limitation is that the participants all work at highly ranked research libraries. These libraries have excellent collections and, one would assume, adequate staffing, respect from users, and reasonable compensation. This work environment would logically contribute to a more positive attitude about work than one might find at a library that is struggling financially and is less well-supported by its academic community. Findings related to engagement, positive sensations, relationships with users, and professional identity could easily be affected by this characteristic.

Another limitation is a possible reluctance on the part of participants to discuss unpleasant or negative aspects of their experience. Although participants occasionally complained about or criticized users and colleagues, they may have been reluctant to express all of their criticisms or the extent of their negative feelings, out of self-protection or respect for users and colleagues. In addition, my status as a former reference librarian may have affected what the participants were willing to reveal. Although I feel that my former status helped to establish rapport, it may also have affected their willingness to reveal negative attitudes or shortcomings in their performance.

Finally, it is important to consider that the findings of the study are just one interpretation of the data. Efforts have been made to conduct the study in a transparent

and rigorous manner and to reveal the perspective of the researcher, so that the reader may evaluate the results and the impact of the researcher on them.

Future Research

This exploratory study not only offers a novel perspective on reference work, but also raises additional questions for future research. Some of these questions involve extending the research question of the current study into additional environments; others concern questions raised by the results of the study.

One area for future research is whether the findings of the current study can form an effective framework for understanding and studying reference work in academic research libraries more broadly. Is the experience of reference work as revealed by the current study representative of the experience of other librarians in academic research libraries? Further in-depth studies of reference work in academic research libraries would clarify and contribute to the findings of the current study.

To understand reference work, future research should likewise not be limited to academic research libraries, but should be expanded to include other library and information service environments. There is a common belief among practitioners that reference work varies across environments. The results of this study suggest that this would be the case: since the user has such a strong impact on the experience, one would assume that different user groups would cause the experience to be very different. What themes would emerge from studies of the experience of reference work in public libraries, or health information centers, or school media centers? Similarities and differences in experience would reveal the essence of the experience of reference work, as well as the effect of environment on the work. Along similar lines, future research

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might explore the relationship among the multiple purposes for reference work. The study suggests that reference interactions have multiple possible purposes and that the purposes vary among interactions. What factors determine the purpose for the interaction? A clearer understanding of the purposes of reference work is necessary for preparing future librarians and evaluating reference work.

Other suggestions for future research are inspired by the results of the study or its limitations. For example, more research is needed to understand the effect of engagement on reference work. How common is the fully engaged experience reported in this study? Is commitment and passion a characteristic of reference librarians, or was it simply a commonality for the group in this current study? How does dissatisfaction or burnout affect the experience? Additional studies, including some in which participants are not self-selected for engagement or are self-selected as dissatisfied with their work, would shed light on these questions.

An interesting issue raised by the study is the effect of failure on librarian motivation. How common is the phenomenon of "reference interview regret" and the desire to continue working on a question long after a user has left the interaction? Is this persistent and positive reaction to failure a universal experience of reference librarians? Is it limited to the most fully engaged librarians? Or was it simply an experience of the particular participants in this study? More in-depth research in this area could help to facilitate tools for professional education and professional development. Exposing these behaviors motivated by failure to pre-service professionals could help them become comfortable with the unknown and help them learn how experienced professionals continue to develop their expertise.

Another issue to investigate is the possibility of a "reference identity" distinct from other professional identities. If such an identity exists, how does it relate to other professional identities noted in the literature, such as a professional's identity as a teacher, as an academic, and as a librarian?

Finally, once the experience of reference work is better understood, the relationship between librarians' thinking and behavior can be effectively studied. How does a certain approach to reference work manifest itself in behavior? How can changes in perception of reference work affect behaviors in negative and positive ways? If certain approaches to reference work are considered better, what behaviors are associated with these approaches?

Conclusion

The current study complements earlier studies of reference work by revealing the experience of the practitioner. This exploratory study interpreted reflections, opinions, and narratives of practitioners working in academic research libraries, using the rigorous procedures of interpretative phenomenological analysis. This practitioner perspective reveals that the experience of reference work for the participants in this study is characterized by five themes: the importance of the user, variety and uncertainty, fully engaged practice, sensations of reference work, and sense of self as reference professional. This perspective might be the first step in a framework for understanding and studying the experience of reference work. Future study should reveal how transferable this perspective is to other practitioners and environments, and should tackle remaining questions, such as how the multiple purposes of reference work relate. Overall,

the study serves as an initial step in revealing the experience of the reference professional

and inspires a path toward further study of this important work.

Appendix A:

Text of Recruitment Email

As you may know, I am a doctoral student at the School of Information and Library Science at UNC Chapel Hill. For my dissertation research, I am conducting a study about the meaning of reference work from the perspective of reference librarians working in academic research libraries. Because you are an experienced academic reference librarian, your thoughts and opinions would be a valuable contribution to my research.

To participate in the research, you must
- work in an academic research library,
- have reference service as an important part of your position responsibilities,
- have at least two years of experience providing reference service, and
- be actively engaged in reference work.

Your participation would contribute to a better understanding of reference work. What I would be asking you to do is to be interviewed by me for two to three one-hour interviews.

You are under no obligation to participate in this research, and you can change your mind at any time in the process without consequence.

If you are interested in learning more about participating in this research, reply to this email (vanscoy@unc.edu) or call me at 919-395-8274. After I've heard from you, we will set up a time to meet. At this meeting, I'll explain the research and give you a consent form for your review and signature. If you consent to participate in the research, I will conduct the first interview.

If you have any questions about this study, please reply to this email (vanscoy@unc.edu) or call me 919-395-8274. You are also welcome to contact my advisor, Dr. Barbara Moran, at moran@ils.unc.edu or 919-962-8067. This study has been approved by the UNC Chapel Hill Institutional Review Board. You may contact them with questions or concerns at IRB_subjects@unc.edu or 919-966-3113 (refer to study #10-1989).

Appendix B:

Institutional Research Board Approval

From: IRB <irb_no_reply@mailserv.grad.unc.edu>
Date: November 4, 2010 2:36:16 PM EDT
To: <vanscoy@email.unc.edu>
Cc: <moran@ils.unc.edu>, <tlcox@email.unc.edu>
Subject: IRB Notice

To: Amy Vanscoy
School of Info and Libr Science
CB:3360

From: Behavioral IRB

Date: 11/04/2010

RE: Notice of IRB Exemption
Exemption Category: 2.Survey, interview, public observation
Study #: 10-1989

Study Title: Exploring the Meaning of Reference Work for Librarians in Academic
Reference Libraries

This submission has been reviewed by the above IRB and was determined to be exempt
from further review according to the regulatory category cited above under 45 CFR
46.101(b).

Study Description:

Purpose: To describe the experience of reference work from the perspective of academic
librarians working in research libraries.

Participants: 8-10 practicing academic reference librarians.

Procedures: Conduct interviews.

Investigator's Responsibilities:

If your study protocol changes in such a way that exempt status would no longer apply,
you should contact the above IRB before making the changes. The IRB will maintain
records for this study for 3 years, at which time you will be contacted about the status of
the study.

Researchers are reminded that additional approvals may be needed from relevant "gatekeepers" to access subjects (e.g., principals, facility directors, healthcare system).

CC:
Barbara Moran, School Of Info And Libr Science
Tammy Cox, (School of Information and Library Science), Non-IRB Review Contact

Participant Consent Form

University of North Carolina-Chapel Hill
Consent to Participate in a Research Study
Adult Participants
Social Behavioral Form

IRB Study #_____10-1989_____
Consent Form Version Date: __11/01/10_____

Title of Study:
Exploring the Meaning of Reference Work for Librarians in Academic Research
Libraries

Principal Investigator: Amy VanScoy
UNC-Chapel Hill Department: School of Information & Library Science
UNC-Chapel Hill Phone number: 962-8366
Email Address: vanscoy@unc.edu
Faculty Advisor: Dr. Barbara Moran
UNC-Chapel Hill Department: School of Information & Library Science
UNC-Chapel Hill Phone number: 962-8067
Email Address: moran@ils.unc.edu

Study Contact telephone number: 395-8274
Study Contact email: vanscoy@unc.edu

What are some general things you should know about research studies?
You are being asked to take part in a research study. To join the study is voluntary.
You may refuse to join, or you may withdraw your consent to be in the study, for any
reason, without penalty.

Research studies are designed to obtain new knowledge. This new information may help
people in the future. You may not receive any direct benefit from being in the research
study. There also may be risks to being in research studies.

Details about this study are discussed below. It is important that you understand this
information so that you can make an informed choice about being in this research study.
You will be given a copy of this consent form. You should ask the researchers named
above, or staff members who may assist them, any questions you have about this study at
any time.

What is the purpose of this study?
The purpose of this research study is to learn about the meaning of reference work from the perspective of academic reference librarians.

You are being asked to be in the study because you are an experienced reference librarian who is actively engaged in reference work.

How many people will take part in this study?
If you decide to be in this study, you will be one of approximately eight to ten people in this research study.

How long will your part in this study last?
Your part in this study will last approximately two months. You will participate in two to three interviews which will each last for about an hour.

What will happen if you take part in the study?
If you decide to be in this study, you will meet with the researcher who will explain the procedures and give you a chance to ask questions. You will answer questions concerning your experience of reference work.

You will meet with the researcher again to answer follow-up questions about your interpretation of reference work. The researcher may ask for an additional follow-up meeting if there isn't enough time during this meeting to discuss everything.

You may decline to answer any question for any reason and may withdraw from participation in the study at any time without providing an explanation.

What are the possible benefits from being in this study?
Research is designed to benefit society by gaining new knowledge. You may also expect to benefit by participating in this study by having the opportunity to reflect on your practice and to share your reflections with someone else.

What are the possible risks or discomforts involved from being in this study?
There are no known risks associated with this study. There may be uncommon or previously unknown risks. You should report any problems to the researcher.

How will your privacy be protected?
You will not be identified in any report or publication about this study. Although every effort will be made to keep research records private, there may be times when federal or state law requires the disclosure of such records, including personal information. This is very unlikely, but if disclosure is ever required, UNC-Chapel Hill will take steps allowable by law to protect the privacy of personal information. In some cases, your information in this research study could be reviewed by representatives of the University, research sponsors, or government agencies for purposes such as quality control or safety.

The researcher will take steps to remove all potentially identifying information and will give you a chance to ask for information to be removed that you feel may identify you. Your name, position title, and the name of the library where you work will not be reported.

You will be audio taped during the interviews for this study. The audio recordings will be transcribed and destroyed at the end of the study. You may request to have the audio recording turned off at any time.

> Check the line that best matches your choice:
> _____ OK to record me during the study
> _____ Not OK to record me during the study

Will you receive anything for being in this study?
You will not receive anything for taking part in this study.

Will it cost you anything to be in this study?
There will be no costs for being in the study.

What if you are a UNC employee?
Taking part in this research is not a part of your University duties, and refusing will not affect your job. You will not be offered or receive any special job-related consideration if you take part in this research.

What if you have questions about this study?
You have the right to ask, and have answered, any questions you may have about this research. If you have questions, or concerns, you should contact the researchers listed on the first page of this form.

What if you have questions about your rights as a research participant?
All research on human volunteers is reviewed by a committee that works to protect your rights and welfare. If you have questions or concerns about your rights as a research subject you may contact, anonymously if you wish, the Institutional Review Board at 919-966-3113 or by email to IRB_subjects@unc.edu.

- -

Title of Study: Exploring the Meaning of Reference Work for Librarians in Academic Research Libraries

Principal Investigator: Amy VanScoy
Academic Advisor: Dr. Barbara Moran

Participant's Agreement:

I have read the information provided above. I have asked all the questions I have at this time. I voluntarily agree to participate in this research study.

_____   _____
Signature of Research Participant   Date

_____
Printed Name of Research Participant

_____   _____
Signature of Person Obtaining Consent   Date

_____
Printed Name of Person Obtaining Consent

Appendix D:

Interview Schedule

First Interview

1. Briefly explain the study and what the participant will be asked to do. Give participant a chance to ask questions. Go over consent form and obtain consent.

2. Reveal my history with reference service. Explain that I will be asking him or her to clarify ideas or define terms to make sure that I really understand what they mean.

3. Define "reference work" with the following explanation: I will be asking you questions about "reference work" by which I mean your interactions with users. I'm sure that you do many types of work in your capacity as a reference librarian, but I'm specifically interested in your interactions with users.

4. Conduct the interview using the following questions as a general guide. Questions may be asked in a different order if an appropriate segue to a later question occurs, and questions need not be asked if the participant has already provided an answer. If time runs short and not all questions can be asked, the last question asked in this session should be one of the last two.

   - Why don't you start out telling me briefly about your career?
   - Can you tell me about the kind of reference work that you do?.
   - What do you see as your role in the reference interaction?
   - Tell me about a specific reference interaction that you were really satisfied with or that you feel went really well? Possible prompts: Why do you feel this interaction was satisfying or went well?
   - Tell me about a reference interaction that did not go well or that you were dissatisfied with? Possible prompts: Why did you feel it didn't go well? What did you wish had happened differently?
   - What would you say is the main difference between a good reference interaction and a bad one?
   - How would you complete this sentence: Reference work is like…? Possible prompts: Why did you complete the sentence that way? How do you feel about that metaphor? Is it ideal or is it the way things really are?
   - What do you find most interesting or exciting about reference work? Possible prompts: Why do you find this part of the work interesting or exciting? Is this a big part of your work?
   - What do you think is the most important thing you do at the reference desk? Possible prompts: Why is this the most important thing? Do you think that your users think this is the most important thing?

5. Arrange a time and place for the second interview. Thank the participant

Second Interview

1. Ask if the participant has any further questions about the study.

2. Ask the participant if there is anything he or she thought of since the last interview that he or she wanted to share.

3. Ask any questions from the first interview list that were not asked due to time.

4. Follow up on responses from the first interview using phrasing, such as

   - Last time we talked you said [insert comment]. Could you tell me more about this?
   - I'm not sure I completely understand what you meant by [insert comment]. Could you explain what you meant by this?

5. Thank the participant for participating in the study.

Appendix E.

Sample Theme Development Sheet

Emergent Themes	Interview Data	Exploratory Comments
use of jargon	even in an electronic environment, you're still looking for different access points and different cataloging and you know, just the slightest variation sometimes, you know, in, in what's in a full record, and	(L) use of jargon (D) his strategies don't always work
frustration	sometimes a full record isn't a full record, you know, and it's really frustrating. Or I'll do a keyword search in our catalog and I pull up something, and I can't find	(L) emotional language
infuriating	a keyword and a record and that just infuriates me. Uh, you know, that kind of thing, but, I'm sorry, I'm	(L) Despite long tangents, he always comes right back to the topic without prompting from me
importance of the reference interview	kind of getting off from the question. Um, but well … talking about the reference interview I guess, um, it, so it really is crucial, and hopefully your experience of	(D) years of experience should make you better at the work (L) "crucial" (D) sometimes years of experience interfere
impact of experience impact of experience	years that you bring to bear helps you with it. Of course sometimes it hinders you. You know, and sometimes the student who's Googling away right beside you where you're in a bona fide index is	(C) the patterns of behavior can make it hard to see the obvious, easy way – I've read about these professional ruts (L) image of a race or contest with the user
humbling	finding stuff that you're not finding. And that's humbling, but, you know, uh, you take the answer wherever you get it. When a student finds it, you	(C) Is it competitive? It's a loss of face if the user finds the answer first. But he insists that as long as the answer is found, it's OK.
expectations for self	don't – good for the student. You know, I mean, that, you want to have some pride, but by the same token, you want to find the damn answer, so. Uh, but, but I	(L) more use of words like "humbling" and "pride" in association with finding or not finding an answer
pride in work importance of finding the answer	think, and it's hard, you can kind of teach it, but I mean, you know, it's public service, and it's reading the person and it's, you know, whether they're	(C) here finding the answer seems to be the most important goal, regardless of how it's found (D) reference work can only "kind of" be taught
reading the user user interference	distrustful of you or whether they're trying to, you know, they always say, you know, they're trying to ask you what you want to give them kind of thing.	(D) user can sometimes be deceitful or at least unhelpful in communicating question
reference interview differs by user type	And um, and so it's … you know, you want to, to ask them as intelligently as you can, um, but it also depends on who you're talking to. You know, is it a freshman who has no bibliographic reference whatsoever, or is it a, you know, a faculty member whose been doing it for, you know, thirty years and is	(D) can challenge an undergrad, but must be diplomatic with faculty (C) so user status affects service (D) starts an example of when he didn't take a question seriously enough

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Appendix F:

Master Theme Table

Importance of the User

Focus on the User
Alex: "which is really hard because users believe they have the cover of the information" (3)
Alex: "they may miss out a whole lot of things, they just go about… searching their familiar places in familiar ways" (3)
Alex: "sensed that I was meeting, or satisfying, the library law number one, which says that books are for *all*" (emphasis on "all") (8)
Alex: "we haven't probably done the best to reach out… people who have felt alienated, and who haven't understood what it is, what's going on and help them to… orient them to the changes… that's necessary" (8)
Alex: "constantly stay in tune to the needs of users and then be there to help them" (14)
Alex: "So their work, in general, was not efficient to the expectation of a librarian." (15)
Alex: "scary to me" (16)
Dave: "I like to deal with questions, you know, what their approach to, you know, how people are thinking about approaching whatever their question is." (13)
Dave: "I think there's some places where you sort of get so tied up in the technology we forget it's people that have to use this and in real time. " (16)
Jake: "sometimes they don't know some very basic source that maybe they should." (14)
Jake: "some faculty member, extremely well known in their subject areas… they don't know this basic thing database or something. And you're thinking to yourself, "How in the world can they not know this basic resource in their area?" (14)
Kate: (most exciting) "working with people" (10)
Mark: "I definitely answer way more email from like reference people than I ever have or will from like science people" (2)
Mark: "like paging through and trying to run searches, and just like, this futile like, struggle to like catch up with like their ideas and find their stuff" (10)
Mark: "you watch them search, and they're terrible at it and they don't know what they're doing, and they don't know how to deal with any weird problems." (15)
Mark: "I pretty much never talk to undergrads" (22)
Melinda: "[exciting and interesting] the interactions… especially with students… faculty, too" (14)
Sophy: "this is one thing they're doing in the middle of a gazillion other things they're doing." (19)
Sophy: "they're gonna get that information and then they're gonna have to do something that's really much more hard: synthesize it and make sense of it, do something meaningful with it, try not to plagiarize. I mean all that is way harder, I think, than what we have to do" (19)
Sophy: "a more multifaceted understanding of the student as a person" (20)
Sophy: "you're very user-centric" (47)

Connection and relationships

Alex: "my clientele" (1)

Alex: (with his clientele) "tighter relationship" (5)

Alex: (with his clientele) "those are the interactions I get involved… from the bottom of my heart" (5)

Alex: (mentor) "sometimes it blooms into a mentor relationship" (5)

Alex: (with gen ref users) "don't really feel a personal… connection" (6)

Alex: "long-time relationship with the user" (exciting) (13)

Dave: "I work with those, those individuals pretty closely…Sort of getting to know... faculty members, um, I work with them pretty closely… that ends up being lots of individual contact with people " (4)

Dave: "I got to work with him again… I think the most satisfying, you know, sort of relationship building within librarianship is the most satisfying" (7-8)

Dave: "It was bad. And it ruined my relationship with her." (9)

Dave: (interaction is key) "It's not quite like, it seems to me, it's not quite like standing at the reference desk or sitting with somebody and having a chance to sort of really interact with them" (25)

Jake: "I ended up working with two of them a lot,… and established relationships. So it's really, that's really gratifying." (17)

Jake: "I mean the reference interview is, is crucial. It really is. It's also iterative" (40)

Jake: "harking back to the reference interview, something kind of a sparring aspect to it, where you're, um, trying to help but in order to do that, it does have to be somewhat iterative. Um, and so there is initially, at least, the interaction, and then maybe continuing the interaction." (47)

Kate: "somebody who helps them with [typical library tasks] or someone who… partner[s] with them in their research" (14)

Mark: "Like sometimes you're, you're answering questions and like you're just on a different wavelength from the person you're talking to and it just isn't working. Sometimes it works and they understand what you're telling them" (5)

Mark: "it was just really nice because clearly there was a good rapport" (5)

Mark: "obviously we weren't communicating very well" [led to failure] (7)

Mark: "you're kind of like partners too, because you don't… really know" (8-9)

Mark: "I use the word "we" a lot when searching like, or "us" or let's try searching this and then we should do this and then maybe we can try this." (9)

Melinda: "so they're kind of my people" (15)

Melinda: "there's that personal connection that happens" (15)

Melinda: "it's nice… seeing people over and over again" (30)

Melinda: "I can be helpful… it builds trust… and opens up the communications, too. You just kind of know what people are asking for " (30)

Scott: "in the subject role you have an ongoing relationship" (39)

Sophy: "I might say to them, "You know, that's a good question. You know, I don't know right off, but we're gonna sit here, and we're gonna figure it out together." And so I think it's just you know, that, you know, is, then you enter a process with them" (8)

Sophy: "I was like, "Why don't you come in here, and we'll talk about it." And so she – I never showed her anything on the library's website. We talked" (10)

Sophy: "my students" (10)

Sophy: "we'd come to a shared understanding of what they want" (14)

Sophy: "it's more like being uh, being a teacher or, um, and being a good listener" (18)

Sophy: "Sit down and let's figure it out together. You know, when, and also, you can get back in touch with me," and that this wasn't a one-time thing necessarily" (47)

Sophy: "makes an effort to connect" (48)

Sophy: "the person… makes an effort to connect… to really understand and to really help" (48)

Sophy: "you've kind of entered in like a comrade in like this process." (49)

Influence and power of the user

Dave: "And so she was mad and she disconnected me." (31)

Dave: (super-ordinate theme: Role Depends on User)

Jake: "depends enormously kind of on what level you're doing" (9)

Jake: "you're the arbiter of what you're finding, and it's not your topic, so it's a bad, you know, you're just guessing. And, and depending on what it is, you may be way off." (11)

Jake: "you start of in working on it, find what you think is the answer and it's not what they mean at all and you've already wasted a fair amount of time" (41)

Jake: "it also depends on who you're talking to. You know, is it a freshman who has no bibliographic reference whatsoever, or is it a, you know, a faculty member whose been doing it for, you know, thirty years and is very specifically knows what he or she wants?" (42)

Jake: "you know when it's a bad reference interview. Either you haven't asked a question right or they've been dishonest and say, "Well, what I really wanted." And it's like, why in the hell didn't you say that at first because it would have been a lot simpler all the way around?" (47)

Jake: "you're not the arbiter, you know, and you might have still not gotten what they really wanted" (47)

Jake: "part of that is on you because you hopefully should have elicited it. um, but, but there, there are also different levels to that, too. Some, you know, some of it's incumbent upon them to really, to ask you what they really want." (47)

Kate: "part of… process was teaching people how to help themselves" (8)

Kate: "willingness to learn" (8)

Kate: "certain amount of influence you can have… then at some point you don't" (10)

Kate: "you're not in control of what's going on" (10)

Kate: "whether or not they then apply those skills… is really… up to them" (21)

Kate: (super-ordinate themes: Focus on Process for Undergraduate Students and Uncertainty/Variety and Technology for Faculty)

Mark: "you're kind of like partners too, because you don't… really know" (8-9)

Melinda: "hardest interaction is when you don't get to finish the interaction" (10)

Scott: "most of the people at the Reference Desk are novice researchers in whatever field they're in. And so the responsibility of the librarian is really different" (2)

Scott: "But in my role as a subject librarian, I'm much more involved with, with faculty, and graduate students to a lesser degree. So the whole tenor of the discussion is really different." (2)

Scott: "in that case, even though you don't find a specific thing, that wasn't the request. So I guess that maybe the nature of the request determines the satisfaction." (13)

Scott: "I guess, what I think important depends on what they need. So I guess I don't have this idea of what should happen in a reference interaction." (14)

Scott: "I guess it depends on the patron. So if the patron is more engaged or maybe more assertive, and they're asking questions… So I feel like, maybe more assertive patrons turn it into an interview. Whereas I feel like if they're being more passive, then I need to answer questions or explain things that haven't been explicitly asked. So I'm kind of perceiving this and then gearing the conversation or the interacting based on, based on the patron's kind of, uh, personality" (24)

Sophy: "when you're working at the reference desk… the people are coming to you for help, and they have a certain amount of time and a certain amount of patience and a certain amount of expectations of what you're gonna give, give them. And, and it's more of a help, immediate help desk kind of a feel in that case. Right? So if, if they just want an answer, you can try to weave in, "Well, let me show you how to do that." But if they're impatient about it, you're just gonna give it to them and let them go, so it ends up still being a positive transaction for you and for them" (21-22)

Managing user feelings and expectations

Alex: "I removed the fear in her mind… and also the self-perception that she was being alienated" (7)

Dave: "she was no longer, you know, I'm sure was embarrassed and you know, frustrated and embarrassed " (9)

Jake: "you just have to be really careful" (15)

Mark: "I was doing it a little bit differently, therefore it was wrong" (6) [from user's perspective]

Mark: "she had… very specific expectations, and I wasn't meeting them" (7)

Mark: "And then this other person's mad because she wasn't getting to see exactly what she wanted right then and there… wasn't what she was expecting" (7)

Mark: "like making it not seem so scary" (13)

Mark: "helping someone learn how to become… comfortable in like, just because the interface looks a little different, it's not like a totally different realm, you know." (14)

Mark: "if you don't meet their expectation they're gonna… next year when you like, want to meet with them… they're gonna be like, "No, we're ok; we'll figure it out."" (16)

Melinda: "be the mediator of that [frantic… energy]… the place where the students can come and release" (11)

Melinda: "they have expectations that are… a little large for… my paper's due tomorrow, so I'm gonna go in tonight… that's frustrating… you want them to do well" (11)

Melinda: "leaving the user in a place where they feel like… they've been listened to, their needs have been explored" (28)

Sophy: "I think all that kind of language is leading up to a building up of their confidence" (7)

Sophy: "that she's feeling a little overwhelmed." (37)

Sophy: "Like that sense of like um, um, that you can do this. And I don't mean like a pat on the back, "You can do this." That's not what you say." (47)

Sophy: "And again, it's not something you're gonna say, like, "You can do it." It's not like you're a coach." (48)

Variety and Uncertainty

Dave: "I get to work with a nice variety of students" (4)
Dave: "wherever it takes you." (11)
Dave: "And there's four questions going on at one time" (25)
Dave: "I may be wrong about that, you know, it may be more important than I think." (29)
Dave: (options and they may introduce variation) "I'm not sure why I did it that way. You know, who knows?... I'm inconsistent" (31)
Jake: "but you never know what you're gonna get or where it goes" (21)
Kate: "a lot of variety" (2)
Kate: "lots of different factors that can affect each of them… a garden or a in their— doing their research" (9)
Kate: (a good thing) "rapid change of pace" (10)
Kate: "change of pace and variability of it at all levels" (10)
Kate: "new information… new tools… new ways of thinking about things… a nice combination" (10)
Kate: "you're not in control of what's going on" (10)
Kate: "the research assistance varies" (19)
Kate: "you never know where it will go… makes it interesting" (19)
Mark: "but there's a lot more of like, computing help and how do you use this software, and um, just all sorts of different things." (3)
Mark: "Like I don't know if they're gonna be happy with a thousand like kind of good things, or three really good things" (9)
Mark: "when you work at a reference desk, it's like anyone can ask you any conceivable question at any time" (25)
Mark: "librarians… could conceivably get any question at any time" (29)
Melinda: (lots of types) "directional… technical… research… look up… it kind of varies" (4)
Melinda: "it's a mixed bag" (12)
Melinda: "really, truly never know what's gonna come at you" (13)
Melinda: "just so all over the place" (14)

Varied users and contexts
Alex: "email questions that I answer, and the one-on-one consultation request that I respond to and… the faculty house calls that I make, those involve… my subject expertise" (5) [exp consult]
Alex: "because of the geography of the learning commons and the reference desk, I receive questions from undergraduate students and around half of them would be directional" (5) [gen ref]
Alex: (general reference) "general common sense understanding of librarianship and the resources that library provides" (6)
Alex: (expert consultancy) "helping somebody to create new knowledge or invent something or… innovate something" (29)

Dave: (tech support for faculty) "he's technologically – he's you know, he makes lots of frustrating errors in terms of being able to locate his information. So I had that kind of role with him. It's not so much to help him identify what the topic is." (5)

Dave: (discussion with grad students) "need to talk through what their process is" (5)

Dave: (varied with younger) "with younger students the process is more wide open and the question of evaluation of resources and what, you know, when are popular sources appropriate?" (6)

Dave: "So IM reference doesn't quite get it in some ways, you know, it's really just quick facts and sort of you know, people can ask very broad questions on there, but there's no – the interaction's just – limited somehow." (11)

Dave: "being a subject librarians as opposed to general reference librarians, has sort of made us move to the model in which we sort of sell our services by the sip rather than you know, -- I only have so much time." (33)

Dave: "general reference expertise than, than what than the model that seems to have evolved, which is everybody has their subject and they sort of concentrate." (34)

Dave: "if you perceive, as I sometimes do, that you have a clientele who are a primary focus, then it might be possible you're more interested in you know, the people who are in your bread and butter than in this, these sort of general. "Oh, so you don't really know how to alphabetize, well, that's not really my job." You know, that's nothing to do with my job." (34)

Jake: "bibliographic verification, which is, I think, mostly what we have to offer anyway, more than subject expertise" (10)

Jake: "as a reference librarian, you know, I'm the bibliographic person. I'm not the subject person." (15)

Jake: "you're kind of responsible when you're on the desk, for the whole spectrum, especially on a weekend or night, that kind of thing." (26)

Jake: "whereas outside your area, I would – well, it's hard enough speculating in your area, quote-unquote, uh, but outside, I would never, you know, you don't go there. [LAUGHTER]" (33)

Jake: "You hopefully have a certain minimal competency across the board, you know, 'cause you're gonna have to work nights and weekends occasionally kind of thing. And there's nobody to call" (40)

Jake: "it also depends on who you're talking to. You know, is it a freshman who has no bibliographic reference whatsoever, or is it a, you know, a faculty member whose been doing it for, you know, thirty years and is very specifically knows what he or she wants?" (42)

Jake: "we're also dependent on each other more and more as colleagues. Because as the kind basic directory stuff has gone away, the stuff we're getting is much harder and more interesting in your area." (51)

Kate: (different groups - faculty) "more and more of their questions… were about technology: (17)

Kate: "the research assistance varies" (19)

Kate: (different groups - process with undergrads) "I always try to help them understand the process" (21)

Mark: "I definitely answer way more email from like reference people than I ever have or will from like science people" (2)

Mark: "it's not my specialty. So I wasn't real good at it" (6)
Mark: "partner" (8-9)
Mark: "advisor (10)
Melinda: "reference desk… walk-up traffic… phone calls… chat" (3)
Melinda: "directional… technical… research… look up… it kind of varies" (4)
Melinda: "actual "real" research questions" (4)
Melinda: "[online] more leeway… wiling to engage in a longer interaction" (19)
Scott: "we have kind of this general reference collaborative service that we all contribute to and then we have our subject responsibilities." (1)
Scott: "So the whole tenor of the discussion is really different." (2)
Scott: "the responsibility of the librarian is really different" (2)
Scott: ""most of the people at the Reference Desk are novice researchers in whatever field they're in. And so the responsibility of the librarian is really different" (2)
Scott: "But in my role as a subject librarian, I'm much more involved with, with faculty, and graduate students to a lesser degree. So the whole tenor of the discussion is really different." (2)
Scott: "introductory" (1) vs. "precise" (2)
Scott: big thing in different modes is difference in user group (3)
Scott: "So, so the activity is different, and what, what I'm providing is different, too." (4)
Scott: "educational, largely" (4) vs. " they need something, and I get it for them" (4)
Scott: "I might still say, "Reference questions," but most of the time I'm saying, "Research questions," because that's what it is" (6)
Scott: "And you get lots of questions at the Reference Desk, and maybe a quarter of them are research questions" (6)
Scott: ""in my role as a subject librarian, it's much more broad. I mean, there are just a, there are a suite of things that we can do as subject librarians (7)
Scott: "I guess it depends on the patron. So if the patron is more engaged or maybe more assertive, and they're asking questions… So I feel like, maybe more assertive patrons turn it into an interview. Whereas I feel like if they're being more passive, then I need to answer questions or explain things that haven't been explicitly asked. So I'm kind of perceiving this and then gearing the conversation or the interacting based on, based on the patron's kind of, uh, personality" (24)
Scott: "When you ask me if I have stories, I feel like I go to research questions, so when you're talking about what it is we do or what to call it, I still feel like that's the meat of what we do. There are other things we do but they almost don't count in my mind. So, I guess it does reveal that. I think research questions is what we really count as doing our job." (32)
Scott: "fleeting" (39)
Sophy: "if I was gonna look at the whole portfolio of what I do, um, the part that I, the label that I don't– probably most strongly don't identify, is the subject specialist. I do not consider myself a subject specialist even though I'm the point person in the library for [subject area]. Because I feel too me that's like a model of a librarian does the – subject specialist has a framework around it that you know, that's a part of what I do." (43)

Multiple purposes for the interaction
Dave: "the role varies depending on what the user needs or wants" (5)

Dave: "some comfort or some utility" (12)
Dave: "the technology questions have gotten so big somehow or another. They have to sort of go past those to get to what the, the intellectual problems are sometimes" (24)
Dave: "I think – the theme for me has been sort of, um, to be able to put those two things together. To keep the technology working for folks who don't necessarily have a firm grasp of what it is they're about on the scholarly side, too." (4)
Kate: "some of them had very specific needs " (17)
Mark: "I don't know if they're gonna be happy with a thousand like kind of good things, or three really good things, so, they need to sort of tell me that." (9)
Mark: "it really depends on the task" (13)
Mark: "I guess it depends on the person asking, too." (14)
Melinda: "it varies with the populations I work with" (5)
Melinda: "layers to it… peeling back the onion to actually find out what they're actually looking for" (9)
Scott: "I guess, what I think important depends on what they need. So I guess I don't have this fixed idea of what should happen in a reference interaction." (14)
Sophy: "if you just had assurance and didn't have the product, which might be the tips, that
strategies, the right tools to point them to, the right questions to ask them to make them think deeper about their topic or whatever, then it wouldn't, then it wouldn't be anything. They've got to be together." (29)

Multiple purposes -- deliverable or answer
Dave: "And that I would tend not to do that. If it was a – if it had been a Duke, an interaction with a Duke person, I think I would have tended to not go give, to supply such a ready answer. I'd try to sort of make them get it. but then it didn't" (31)
Jake: "I feel that's probably where we earn our money, you know, is for bibliographic stuff more than such." (10)
Jake: "'cause I really do see our function as kinda, you know, helping people in that way. Rather than… instructional classes" (32)
Mark: "you can't always have an answer, but you can always not have nothing." (12)
Melinda: "then when you actually find what they're looking for, they have that aha moment… it's very satisfying" (8)
Melinda: "if they don't have the answer, have avenues to finding that… a reason why there isn't an answer" (28)
Scott: "needing a piece of information and the librarian would have resources and they would go and find that piece of information. We're not doing much of that anymore. We're not finding the population of Zimbabwe anymore. That's not what we're doing" (5)
Scott: "it's not finding some fact for this person. It's still finding, in a way, but… I think it's a little bit more involved " (6)
Scott: "I think the things that are unsatisfying are when I can't find something. So when someone has something that they're looking for, and it seems like, it seems like it should be there somewhere, but you just can't track it down." (11)

Scott: "But I think for me the things that are most ultimately satisfying are the things where the finding wasn't the hard part. It was the teaching that was the hard part. And, and, kind of communicating a lot of information and ideas to someone. I think that may be the most, most satisfying." (11)

Sophy: "It's a lot easier to just say, "Oh, let me just show you some tools and get you start—" I mean, it's, no matter how instructional you want to be in trying to help them, it's that part. Because I think that's hard, you know" (16)

Sophy: "they just want an answer… they just want you to tell them" (22)

Sophy: "If you were just giving assurance and you didn't also answer their question, you know, um, … then you've, you haven't helped them in the way they're asking for help." (26)

Sophy: "it's helping them find the right tool to help them, or the right bit of information, then you need to help them with that, you know… you haven't helped them if you don't like send them to something to try, and show them how to use it or whatever." (26)

Sophy: "if you just had assurance and didn't have the product, which might be the tips, that strategies, the right tools to point them to, the right questions to ask them to make them think deeper about their topic or whatever, then it wouldn't, then it wouldn't be anything." (29)

Multiple purposes -- instruction
Alex: "she slowly transforms herself" (as part of his success story) (6)
Alex: "it was like a miracle for her" (7)
Alex: "a guide or a teacher would fit the reference work that I, as I perceive it" (11)
Alex: "a guide to somebody who wants to know the path" (11)
Alex: "a path to learning, path to the information, the knowledge" (12)
Alex: "sometimes… a teaching opportunity… of skills and resources" (12)
Jake: "this is somewhat instruction" [differentiates instruction] (5)
Jake: "Ideally, if you're not pressured too much, you maybe try to teach" (9)
Jake: "if there's a curiosity there, then you might do more than, you know, just show them how to find the journal or the book or whatever" (9)
Jake: "I've probably been guilty of it, too, is that you're wanting to teach them everything." (13)
Jake: "with… grad students,… I feel that's much more the, the teachable moment,… either at the desk or doing consultation" (10)
Jake: "the grad students, it varies with departments some, but you try to do a little bit more in terms of teachable moments there." (14)
Kate: "encouraged to put those steps together in a logical way in whatever makes sense for them" (6)
Kate: "hopefully they walk away with a better understanding rather than just an answer" (21)
Mark: "I can tell them like how to get from one of those states to the other one." (9)
Mark: "people are just like, "Wow. I'm learning so much." (28)
Mark: "it's a different world for him now" (31)
Mark: "their mental model might be wrong. and so that's really what you're fixing more than just pointing them to the thing." (32)

Melinda: "a balance… asking me to do research for them? I personally try to veer away from that.. that's sort of my philosophy… we're here to assist them.. not hired researchers… try to make it more instructional" (5)

Scott: taking someone through all the steps and feeling like at the end of the interaction they've really – a whole world has opened up to them…That's, that's really satisfying." (10)

Scott: "But I think for me the things that are most ultimately satisfying are the things where the finding wasn't the hard part. It was the teaching that was the hard part. And, and, kind of communicating a lot of information and ideas to someone. I think that may be the most, most satisfying." (11)

Sophy: "a manifestation of instruction or of learning support" (4)

Sophy: "I could think, oh this is my reference shift, but my orientation toward that student is going to be that this is a form of instruction." (4)

Sophy: "it's like teaching more when a door's opened for you to, as you're showing them, they – you can weave in those things that are really changing their mental model about it." (22)

Sophy: "you're not just connecting their need with a tool, you know, you're, you're helping them as a person with understanding it better" (22)

Sophy: "so I guess reference is customized user-centered, user-initiated instruction." (24-25)

Sophy: "I drew, we kind of sketched out some of the big themes for her. " (37)

Sophy: "you've just shifted their mental model a little bit, or made them think about something a new way because you've asked the right questions. That's, that's really satisfying." (50)

Sophy: made them think about something a new way because you've asked the right questions. (50)

Sophy: "And then I asked her questions like…" (51)

Multiple purposes -- positive user experience
Dave: "my view is in some ways that undergraduates, you know, one of the things they need is adult interaction that's not evaluated on their grades or you know. So that's one of the things. " (12)

Mark: "comfortable" (5)

Mark: "happy" (9)

Mark: "confidence" (13)

Mark: "Like, you definitely like, improved their, their experience…" (10)

Mark: "I don't mind if it's like a softball… really easy thing when I show people [a tool] and they just go berserk for it. Like, I don't care that it's like a gimme topic and they're definitely gonna be interested in that. But it's just… I've shown them that, and that's that makes them happy, so that's good." (11)

Mark: "helping someone learn how to become… comfortable in like, just because the interface looks a little different, it's not like a totally different realm, you know." (14)

Melinda: "having them have a good experience" (16)

Sophy: "if you think about the actions you're gonna take to teach somebody how to use that tool, then, then maybe you're giving assurance there that you can learn this if I show you these things" (6)

Sophy: "to make that person feel like um, that they're able to do it. Mostly that they can come back to you, I think, and that they weren't stupid for asking, you know? That they, they made a smart move" (48)

Multiple purposes -- saving time/efficiency
Alex: "satisfaction that I have helped somebody and saved somebody's time" (most exciting thing) (13)
Alex: "most of the work I do as a reference librarian is saving the time of the user" (23)
Alex: "user is spending a lot of time without any results" (29)
Dave: "I guess that sort of saves time of the reader somehow or another, partly" (18)
Dave: "the primary purpose which is to help them find the materials that they need in a pretty efficient way so that their scholarly product is better." (28)

Fully Engaged Practice

Effort and persistence
Alex: "different kinds of strategies I try to employ" (4)
Alex: "we do have a lot of work to do" (16)
Alex: "I tried to help him, you know, I went all around" (26)
Alex: "spent a substantial amount of time" (27)
Alex: "went to the stacks and tried to treasure hunt" (27)
Jake: "Well, I flailed about and I flailed about... And, um, and they let me work on it for two or three days without any progress. And I did everything I knew." (25)
Jake: "And I kept trying different things, and finally, just out of desperation, and sometimes this is really how you get somewhere." (35)
Jake: "And I looked at everything I possibly could. I mean, [lists 3 sources] and I never found anything um, that I could say conclusively." (37)
Jake: "I took the… quote very seriously, and, you know, busted my butt on it and still didn't find it." (43)
Kate: "we will really bend over backwards to help people" (7)
Mark: "librarians are not known for bad service and being just like, sorry, we don't know" (25)
Mark: "cause I had tried everything" (33).
Scott: "it was just kind of this bizarre piece of information, and it was not easily found… so I had to… use all the information tools at my disposal" (9)
Scott: "it didn't take a long time, and none of these steps were really intensive, but it just, it required some persistence and it required using a lot of different tools to get to the final result" (9)
Scott: "They can't hang around while you poke around indefinitely." (37)
Sophy: "I'm not saying there was anything special about me, but it may have been um, she was better at explaining herself." (after clearly providing a conceptual perspective) (12)
Sophy: "And even getting to define, trying to help her define what is a handout, you know; that could be anything" (17)
Sophy: "I think I asked good questions of her on my end." (17)

Sophy: "I went on a limb for them, not on a limb, but I went – I didn't just diddle at it. I helped them. I really tried to help them as much as possible" (29)
Sophy: "I've been some kind of sounding board" (p 39)
Sophy: "you're gonna go that extra mile for them." (47)
Sophy: "you're being just as fully attentive as possible… to really understand and to really help you… and not just kind of like gloss over it, you know?" (48)

Immersion in an individual interaction
Alex: "don't just point them to journal articles and databases, but I also participate in descriptions about what kind of information they want to see and their ultimate goal" (12)
Alex: "I value my… time working with students and faculty of [college] as… more demanding" (21)
Alex: "more demanding" (21, 22)
Dave: "This is happening now. Our interactions really are, you know, they may have some long-term impact, but they are, they're about the moment. This moment needs." (16)
Dave: "we need to be sure that we take it as a moment to you know, to make the interaction meaningful" (15)
Dave: "Important not to, you know, not to drop any more of those opportunities as possible. So I guess that's what I was thinking of is that every interaction is pretty charged" (33)
Jake: "Apart from, "Where's the bathroom?" um." [in response to what makes a question boring – directional] (39)
Mark: "that's just sort of like, something you do. It's not that interesting" (14)
Scott: I have a heading "passive vs. insertion into need" (???)
Sophy: "You have a shift… you're there on the front line" (3)
Sophy: "It's deeper and more customized" (4)
Sophy: "more in depth, like, interesting" (13)
Sophy: "you're there on the front line helping students" (3)
Sophy: "I love the in-the-moment-ness of it, that the student is right there in their work." (4)
Sophy: "I just feel like you're right there in the middle of their process. They're usually stuck, or branching out, they're needing help" (4)
Sophy: "so much of what we do at the reference desk is like, printing and you" [doesn't enjoy] (45)
Sophy: "I'd rather work an evening shift, for example, so that I'm there for several hours and like, more immersed in it" (45)
Sophy: "you're more in the midst of their, their need" (VR) (45)
Sophy: "they're kind of in the thick of all this process and stuff like that." (45)

Intuition and "reading the user"
Alex: "constantly stay in tune to the needs of users and then be there to help them" (14)
Jake: "it's public service, and it's reading the person" (42)
Jake: **"**in terms of reading, you know, it can be anything from intonation to um, or on the, you know, who you're making judgments about who you're talking to and the tone of voice." (44)

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Jake: "maybe listening," [most important thing] "you have to listen,… and you have to think" (49)

Jake: "intellect is not necessarily the most important criterion in terms of successful reference. You know, I mean, because you are dealing with people, and you are trying to help people. And so you have to have some level of people skills" (51)

Mark: "I just sort of have this instinct I guess from experience" (8)

Mark: "you can kind of get a sense real fast" (27)

Mark: "recognizing when you should stop answering the question" (27)

Mark: "being more receptive to what they really need" (28)

Mark: "I had the sense he probably doesn't actually want physics abstracts." (30)

Mark: "you probably get the sense… he hasn't done research in a while" (31)

Scott: "So just going beyond what they're actually asking. Kind of interpreting with what they're asking, what they're really gonna need" (26)

Sophy: "Empathy's I think a huge part of what we're doing." (6)

Sophy: "I feel like it suffused through the process… I mean, those are, those are like more suffused through versus like your actual action." (27-28)

Sophy: "to give, to give full attention, to give care to that person, to take seriously their issue, and to, and to, to, to get them to where they need to be." (47)

Sophy: "you have to read that person and see what they um, what they need, um, try not to make a lot of assumptions" (47)

Sophy: "I can sense when they're ready" (50)

Sensations of Reference Work

"Joy of helping."

Alex: "kind of interactions I get involved in from the bottom of my heart" (5)

Alex: "I feel the usefulness of my expertise and being a librarian" (5)

Alex: "reap that joy of helping" (13)

Dave: "reference work is like an effort to help people" (11)

Jake: "you end up getting thanked and acknowledgements, and that's some of the more rewarding stuff we get" (30)

Mark: "that's something I'm good at and… can help them with that." (10)

Mark: "I'm a useful person" (15)

Mark: "you're like, oh, I need to like, find a new way to be useful." (16)

Mark: "then you just like, knock it out of the park. And they're like, "Oh, wow, reference librarians are awesome." (triumphant, awesome) (17)

Melinda: "it can be kind of like a roller coaster… personally I find roller coasters really fun" (11)

Melinda: "exciting" (15)

Scott: "in the end, what I provided for her was what she needed, and it was helpful for her, so. I mean, that's ultimately the biggest satisfying, no matter what you do, if, if the patron's need is satisfied, that's what ultimately makes it so satisfying I think" (9)

Scott: "I think it's most satisfying when it's clear that the person would not be able to do this on their own" (10)

Scott: "All right, we really nailed that one! We got their question answered!" (37)

Delight in the intellectual challenge.
Alex: "it's an opportunity for me to learn" (23).
Dave: "I like to deal with questions, you know, what their approach to, you know, how people are thinking about approaching whatever their question is. And development of questions" (13)
Jake: "unscramble" (2, 10, 25, 33)
Jake: "byzantine environment" (2)
Jake: (competition) "I would have been proud of myself if I'd thought of it" (24)
Jake: "But when it is something that interests you, and it is also challenging… I still find that exciting" (26)
Jake: "it is gratifying when you have a question that challenges you and you can do" (26)
Jake: "I've always tried to serve people equally, but you know, some questions I find utterly boring, and so you try to fight yourself on that, and, and do as best you can." (26)
Jake: "It's so beautiful" [describing a source] (27)
Jake: sources are… "revolutionizing things" (28)
Jake: "revolutionized what you can do" (28)
Jake: "Apart from, "Where's the bathroom?" um." [in response to what makes a question boring – directional] (39)
Jake: "I still enjoy it. You know, you still get questions that are challenging, interesting" (52)
Jake: "I still enjoy it. You know, you still get questions that are challenging, interesting" (52)
Kate: "you never know where it will go… makes it interesting" (19)
Kate: "always interesting stories… you wouldn't believe what just happened" (25)
Mark: "that's just sort of like, something you do. It's not that interesting" (14)
Melinda: "Thrill and intellectual challenge of the work… it's really fun and intellectually challenging and interesting… that's kind of the hook" (13)
Melinda: "it's kind of that up and down… there are lulls, there are peaks… there can be a lot of surprises… some twists and turns… you don't know what you're going to get" (13)
Melinda: "I'm always learning about things… really interesting" (15)
Scott: "any information resource that goes beyond the typical bibliographic stuff you've dealt with for a long time I think is interesting and exciting" (16)
Scott: "It's frustrating and really difficult, but I think anytime, it just keeps, it keeps the job fresh" (16)
Scott: "I'm pretty good at finding those kinds of things, but any time it goes beyond that, it's, it's pretty exciting" (17)
Sophy: "so much of what we do at the reference desk is like, printing and you" (doesn't enjoy)

Anger, frustration and embarrassment
Alex: "I felt bad, bad about my inability to help him" (27)
Dave: "I hate that, when uh, when things like that happen" (10)
Dave: "That was sad" (10)
Jake: "embarrassing" (4, 6, 14)
Jake: "you can make a fool of yourself that way very easily" (6)
Jake: "hubris" (23)

Jake: "I can't find a keyword and a record and that just infuriates me" (41)

Jake: "dignity and self-respect" (45)

Mark: "I tried to get away because obviously she wasn't very happy with me… there was like no escape hatch" (7-8)

Melinda: "you have to… try to come back to… that moment and that place maybe you just had… somebody angry call" (11)

Nature of failure

Dave: "I have, of course, lots of failures as a reference librarian" (8)

Dave: "even though, you know, that's it not my fault, literally, was not my fault" (9)

Dave: "eleventh hour" (9), "due in three hours" (p.9), "under the pressure of time" (13)

Dave: "that just because you can think of it doesn't mean it's so" (14)

Dave: "if the stars are aligned, that works" (14)

Jake: "They're mostly failures. Or what you -- it depends on what you'd class it as a failure or not" (23)

Jake: "I've got more failures than successes. Well, it depends on how you define it" (36)

Jake: "it sounds straight-forward enough… straight-forward. Seems like" (but it wasn't) (36)

Jake: "you're just not finding it. You know, and so you can, again, you can never say unequivocally, but um, but I guess that's part of the interest, you know, part of what kind of drives you is seeing if you really can find it" (39)

Kate: "constraints to how much time you can spend" (22)

Mark: "got a hold of me" (3, p. 14)

Mark: "spiraled out" (5)

Mark: "I ended up sitting with her for like an hour and a half, and she kept saying, "Oh, I'm taking up too much of your time." And I'm like, "No, this is fine." (5)

Mark: "hopeless" (8)

Mark: "I had no other ideas" (8)

Mark: "I'm just like, I have no idea" (11)

Mark: "So you have to be comfortable with that idea that there's not always gonna be an answer." (26).

Mark: "Sometimes they're in no rush and they'd like to learn more. Sometimes they just need those three and it's, it's business and they just want out, you know." (28)

Mark: "there's nothing on it. And I was like I don't know. I don't know what to do" (33)

Mark: "it's unusual to find something where you're just like stumped, you know, you just can't find anything and it should be there." (34)

Scott: "the other thing I experienced with this question, which happens often, is like, reference interview regret. As soon as they walk away, thinking like, that just did not go as well as it should have. I should have done this and all these things" (36)

Scott: "that's part of the job as I know it, is like, kind of – and I guess that's how you learn to do it in a better way next time, but just often patrons will leave, and I'll think like that just, that didn't go right. Or I should have done such and such differently. Usually they leave and I don't know why but it's just kind of unsatisfying. Like that didn't go quite right, and then kind of working it around in my head, figuring out things to do differently" (36)

Scott: "I just kind of thought about things I would have done differently and … even to the point that sometimes I spend as much time as I spent with the patron afterwards kind of like poking around a little bit more… if I had unlimited time, where would this have taken, where would this have taken us?" (36)
Sophy: "Well, … let me think. It always goes perfect for *me*. [laughter] (15)

Sense of Self as Reference Professional

Professional Identity
Alex: "be an advocate for the library over there" (8)
Alex: "they only see libraries as facilities that hold information, hold data. And that's what's scary to me" (16)
Alex: "promotion of work, promotion of libraries and their goals, and a redefinition of ourselves" (17)
Alex: "We talk a lot and do less. My little spiel on that. We need to do more." (17)
Dave: "clerk" (30), "friendly librarians" (21)
Dave: "I really don't think that's what we do, but it is a perception" (30).
Dave: "But I think it can send a wrong message to the – I think we have to be careful about what message we send." (33)
Jake: "If you got the analytic, you wouldn't get the series entry or vice versa kind of thing." (1)
Jake: "it was all index load" (12)
Jake: "as part of your arsenal" (12)
Jake: "There not so much the actual sources, but the categories of sources" (20)
Jake: "I might be the only person who knows that one source, cause it's fairly narrow" (52)
Mark: "I'm the person who's… had experience.. using these tools" (8)
Mark: "they know their research, but they don't know the tools to get at it. And like, I know those tools" (10)
Mark: "So you sort of become an advocate for better tools and better searching techniques." (10)
Mark: "the important thing is to be sort of an advocate for like, it's not that easy, like research is different than just Googling stuff" (12)
Sophy: "So I very much identify with being a blended librarian. So I consider myself really half a learning technologist and half a librarian." (1)
Sophy: "I like being grounded as a librarian, 'cause that's where I indentify professionally." (2)
Sophy: "because I identify very strongly with like, like sort of the learning aspect of libraries" (4)
Sophy: "I realized I'm kind of an expert in some stuff, you know? And that was really satisfying. That's when I really started feeling I could give back and mentor other people and really got into that." (41)

Professional identity -- recognition of collegial differences

Dave: "I think we've, we've attracted a different cohort – people – you know. Sometimes more in technology and the management aspects than they are interested in academic aspects." (16-17)

Dave: "it's not as though any of us are right all the time or know everything. You know, there is that, that sort of idea of taking multiple perspectives." (23)

Dave: "Some librarians find that irritating… it's probably not efficient… I see the sort of part of the process." (23)

Dave: "you learn from each other" (24)

Dave: "it's easy enough to blow people off and make them feel like their questions is not interesting or is not good enough somehow. And I'm sure you've seen it at the reference desk, too" (33)

Dave: "Some people are just you know, if they don't have a good answer to the question, you know, they'll sort of bury people in information that may or may not be relevant to the you know, the answer" (33)

Dave: "If you were interested in that sort of management oriented stuff, then it brings you to a, a place. And I think there's a conflict of cultures in some ways within the academic libraries" (37)

Jake: more dependent on colleagues (4, 51)

Jake: "scolded… chastised" (3)

Jake: "had to justify it" (11)

Jake: "I don't know if anyone else in the department would do that" (23)

Jake: "And then the Assistant Department Head when I was at [prestigious institution] was, um, … was almost legendary" (24)

Jake: (another great legend) "scary" (24)

Kate: "as you talk to a variety of reference librarians in different… universities" (12)

Kate: "depends on personalities and perhaps resources as to how much time people can devote to certain individuals" (20)

Mark: "So you sort of become an advocate for better tools and better searching techniques." (10)

Sophy: "So it's almost, it's a matter of terminology, I think, than actually what you're doing. But maybe it can be a matter of approach, too." (4)

Sophy: "and I don't know what other people would say about reference" (7)

Sophy: "And perhaps there are people in the world that that is their approach. Or a context in which like, special libr—you know, where that is what you do." (23)

Power of experience
Alex: "professional mandate, to keep on learning… to equip ourselves to help" (14)

Alex: "helped me to think about some of my work in a different manner" (30)

Dave: "I do think that is a yeah, I'm not sure if it's sort of profiling of your clientele in a way, which would be one way to look at, or trying to – but I guess as long as you remain open to listen to what their comments are, and sort of reevaluate how they're reacting to what you say or how the research is going. Yeah, I think that, I do think I follow things with... folks and for all that you do make judgments along the way." (18)

Jake: "it was really a … just a byzantine environment. Um, but, good training for the humanities" (2)

Jake: "It's also helpful to kind of look at your thought process at the time. Cause if you did it today, good God, you know, you'd probably, no guarantee that you'd do the same thing. Or you'd make the same mistakes maybe. I don't know. It's hard, you know, it's hard to say" (22)

Jake: "hopefully you've got this kind of reservoir, repertoire at this point" (27)

Jake: "kind of interesting when you're standard repertoire of sources don't work" (35)

Jake: "a lot of times you're just kind of throwing out things in WorldCat and fishing" (41)

Jake: "sometimes depending on the nature of the question, I just skip iCatalog and go, go straight to WorldCat, you know, depending on the nature of it. um, 'cause you're fishing in so much bigger pond… might be analyzed differently" (41)

Jake: "hopefully your experience of years that you bring to bear helps you with it." (42)

Jake: "Don't just do the reference courses 'cause that's not gonna do it for you" (46)

Jake: "listening… and then as you're doing that, you're kind of running it through your experience bank, you know, and what you bring to it" (49)

Mark: "I've done these searches so many times… I kind of know what I'm gonna find and I just sort of have this instinct I guess from experience" (8)

Mark: "… I kind of know what I'm gonna find and I just sort of have this instinct I guess from experience." (8)

Mark: "you just get used to seeing certain weird examples" (27)

Mark: "I'll just pretend I know what I'm doing" (27)

Mark: "you… get a better sense of like how to answer questions the more you're doing it" (27)

Mark: "The more you practice it, the better you get at it." (29)

Mark: "you can't really do good at it unless you continue to do it at least a little bit." (29)

Mark: "if there's a week, like if I get a really busy stretch and I have to trade hours, or I take a vacation and I haven't been on the desk in a few weeks and I go out there. I'm "Oh my god," you know, you feel like kind of unprepared." (29)

Scott: "in approaching the problem, it's like, we'll try this first and then we'll try – like in order of ease or likelihood of success. And then maybe the next time you bump up the tenth thing on the list 'cause that's where you found it. So then that maybe comes a more preferred resource in that list of things to try." (38)

Sophy: "I definitely know there's been an evolution over time."

Sophy: "the pattern will often be" (13)

Sophy: "the longer I do it, also, the less I feel like I – or the, the more I go on, I think, I realize that I'm truly understanding them as a more complex – they're in a more complex situation than I probably used to think of them being in." (18)

Sophy: "I used to think early on, you know, ok, how am I gonna answer this question. Now, it's more about ok, this tool probably fits this need. This – and this is what they need to understand about this tool." (19)

Sophy: I used to think early on, you know, ok, how am I gonna answer this question. Now, it's more about ok, this tool probably fits this need. This – and this is what they need to understand" (19)

Sophy: "I feel like I'm always evolving as a professional" (20)

Sophy: "with all these, you know, unknown situations, and then they become sort of templates, you know… like the three articles on X-topic in Academic Search Premier,

and then you, and then, I mean once you've got that down, you have that groundwork, then you can start, you start evolving the subtlety of how you – I've been thinking about this, and I'm gonna take it into an instruction uh perspective. " (20)

Sophy: "Like early on, when I was doing reference, I was, "Ok, I know that kind of tool." You do that. And then you start to think about those little things you can say that help you explain it better to the student. And you're kind of evolving that yourself, 'cause it's making more sense to you." (21)

Sophy: "realizing that the words coming out of your mouth aren't the same old template you know, what you've always said. And you throw out some new phrase and it kind of makes sense" (24)

Sophy: "see the pattern of how, you know, how I worked through a question with somebody" (30)

Sophy: "my perspective on this has changed" (30)

Sophy: "there's some unknown aspect to it. but there will be also some elements of familiarity.

So you're pulling off of those, the familiar, and you're trying to figure out what's unique about this case." (33)

Sophy: "and the more grounded you become… of the sphere of reference work that you do. So if it, for sense of fear that they're gonna ask me something that I can't handle. But like the more grounded you become and sort of know the terrain" (33)

Sophy: "I'm sitting there thinking, you know, I'm aware of like, first of all their process, right? They're kind of deep down in their personal situation. And then their type. You know, I've seen this kind, although they have their unique things about them. And then I'm thinking you know, how does that match up to this landscape of information, what they're gonna have to do" (39)

Sophy: "I remember there was a point, maybe about five years ago, I realized I'm kind of an expert in some stuff, you know? And that was really satisfying. That's when I really started feeling I could give back and mentor other people and really got into that." (41)

Sophy: "you're using that repertoire of experiences that you've had" (47)

Changes in the experience over time

Dave: "new stuff on top… I mean, what is that but reverse chronological order. But I think there's a lot of sort of jingoism that is not, not so very helpful" (16)

Dave: "more of a gatekeeper function because books were expensive and in limited numbers. And so we had to handle that at the desk, had to deal with these questions" (34)

Dave: "I do recognize that focus change over the course of a career, too. So I think in my own case my view of what my career should be has changed over time." (39)

Dave: "I can't think of any of the libraries around here in which we haven't, the academic libraries, we haven't got rid of the people who are not gonna change. That's sort of, that's a straw man to say that librarian's are not interested in embracing change. I don't think there are any examples of that." (40)

Jake: "the whole evolution of the web has, has pretty much happened. [Laughter] I used to think there was a period of change when I got into it and things would calm down. And of course that's [Laughter] only increased exponentially. So, uh, so much for no change. Um, but, and it's, the job has changed, you know, as you'd imagine, uh, enormously." (3)

Jake: "I think, more reliant on each other's backgrounds than we ever were before. When I first came in, I thought I knew a little better business and gov docs, and now it's, you know, I know almost nothing." (4)

Jake: "much more involved, and much more time consuming" (4)

Jake: "we're working a lot longer on more involved questions" (5)

Jake: "we're doing multiple tasks at the desk" (7)

Kate: "it is changing" (25)

Kate: "in a transition time… reference is not static" (26)

Melinda: "reference is changing… it's hard to put a finder on what it is right now" (18-19)

Melinda: "I really do… feel like we're all… asking, what is… public service in libraries? What is reference in libraries? What's happ--… where are we going? What does it all mean?" (31)

Scott: "kind of evolved to become, to become more than just what we thought of typically before." (5)

Scott: "needing a piece of information and the librarian would have resources and they would go and find that piece of information. We're not doing much of that anymore. We're not finding the population of Zimbabwe anymore. That's not what we're doing" (5)

Scott: "people at the Reference Desk have to know about everything that's going on at the university and how to, kind of, help people along in that, in that process… So that's another way I kind of conceive of it. It's not, it's not a historical role, I don't think, maybe for a libraries, or maybe it is, um, but I think that's another important role that we fill." (8)

Sophy: "this is an opportunity for us to think outside the traditional sort of roles of what librarians are" (44)

Appendix G:

Strategies for Addressing Walsh and Downe's Quality Criteria

Stage	Essential Criteria	Specific Strategies
Scope and purpose	Clear statement of, and rationale for, research question/aims/purposes	• Demonstrated clear focus on the phenomenon of reference work as experienced by academic librarians • Explicitly stated that I plan to describe and interpret participants' meaning, rather than explain it • Established link between existing research and this study
	Study thoroughly contextualized in existing literature	• Thoroughly searched, organized and described literature n relevant disciplines to contextualize study • Will search literature again as unanticipated themes emerge from the analysis that need to be contextualized • Will contextualize findings in the literature
Design	Method/design apparent, and consistent with research intent	• Provided rationale for qualitative design • Mentioned epistemological grounding in phenomenology and hermeneutics • Provided rationale for IPA as a method • Discussed why IPA is most appropriate for the research question • Chose an appropriate setting, large academic libraries, for the research
	Data collection strategy apparent and appropriate	• Thoroughly described data collection procedures • Semi-structured interviews are appropriate for type of data needed and for the IPA method • Semi-structured interviews are likely to capture the complexity/diversity of reference work and to illuminate the context in detail
Sampling strategy	Sample and sampling method appropriate	• Explained selection criteria • Justified purposive sampling • Thickness of description is likely to be achieved from this sample • If any disparity occurs between planned and actual sample, I will explain that
Analysis	Analytic approach appropriate	• Method of analysis appropriate to IPA • Will describe methods of analysis in detail

		• Analysis will be conducted by hand as recommended by IPA; data and themes managed by software package to facilitate record-keeping • Will discuss evolution of theme and subtheme development • Context of data will be retained by analyzing data within the context of a particular interview • Subjective meanings of participants will be portrayed • Will provide evidence of prolonged engagement with the data • Will provide evidence of divergence, as well as convergence
Interpretation	Context described and taken account of in interpretation	• Will describe contexts of the data collection • Will describe the prolonged engagement with the data
	Clear audit trail	• Will describe the research process in sufficient detail that readers can follow my "decision trail"; will set up a "lab notebook" to record decisions, questions and time spent with data
	Data used to support interpretation	• Will use extensive verbatim interview quotes in discussion of findings • Will clearly show how interpretation led to conclusions
Reflexivity	Researcher reflexivity demonstrated	• Will discuss the relationship between participants and myself • Will describe my attempts to be self-aware and insightful throughout the study • Will document the effects of this study on myself • Will detail how problems/complications were dealt with
Ethical dimensions	Demonstration of sensitivity to ethical concerns	• Will get IRB approval for study • Discussed my commitment to integrity, honesty, transparency, equality and mutual respect in relationships with participants – will try to demonstrate how I follow through on that during the study • Will deal fairly with all research participants • Will record any ethical dilemmas that arise and how I deal with them • Will document how autonomy, consent, confidentiality and anonymity were managed

Relevance and transferability	Relevance and transferability evident	• Will interweave analysis with existing theories and relevant literature
		• Will discuss how emergent theory may fit other contexts
		• Will clearly outline limitations/weaknesses
		• Will show how the findings resonate with other knowledge and experience
		• Will support results and conclusions with evidence
		• Will offer interpretations that are plausible and make sense
		• Will provide new insights and contribute to understanding of reference work
		• Will outline significance for reference practice
		• Will assess how study was valuable for participants
		• Will outline further directions for investigation
		• Will comment on whether aims/purposes of the study were achieved

Appendix H:

Auditor Statement

27 February 2012

Practitioner Experiences in Academic Research Libraries: An Interpretative Phenomenological Analysis of Reference Work

AUDIT STATEMENT
from
Dr Tamar Posner

I have a BSC and PhD in chemistry from the University of London, King's College and an MA in Integrative Psychotherapy and Counselling from the The Minster Centre/University of Middlesex, UK.

I am registered with the United Kingdom Council for Psychotherapy (UKCP), am an Academic Supervisor for The Minster Centre, London, UK and a Visiting Lecturer in Psychodynamic Counselling at The University of Hertfordshire, UK.

The majority of research endeavours undertaken in the field of psychotherapy are qualitative studies for which Interpretive Phenomenological Analysis (IPA) is an eminently suitable research methodology and one with which I am familiar.

The above-titled dissertation, which explores the lived experience of librarians working in academic research libraries, is a qualitative study; the choice of IPA as the research methodology is therefore appropriate.

In my capacity as auditor, I have examined all the documentation with which I have been supplied and am satisfied that the approach adopted has been both systematic and transparent.

Tamar Posner
BSc,PhD,CChem, MA
MBACP, UKCP No 10161180

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