

LIS313

REFERENCE AND INFORMATION SERVICES



Course video is available on our app

COURSE CODE LIS 313

COURSE TITLE: Reference and Information Services

COURSE UNIT LOAD 2 Units C: LH 15; PH 45

- **Series 1: Evolution, Theory, and Objectives of Reference and Information Services**
- **Series 2: Reference Questions, Tools, and Personnel**
- **Series 3: Techniques of Literature Searching and Types of Reference Services**
- **Series 4: Specialised Reference Services and Applications in Different Libraries**
- **Series 5: Organisation, Evaluation, and Digital Dimensions of Reference and Information Services**

Series 1: Evolution, Theory, and Objectives of Reference and Information Services

Part 1.1 Evolution of Reference Services

- 1.1.1 Early beginnings of reference work in libraries
- 1.1.2 Growth and development in the 20th century
- 1.1.3 Contemporary trends in reference services

Part 1.2 Theoretical Foundations of Reference Services

- 1.2.1 Definition and scope of reference services
- 1.2.2 Major theories underpinning reference work
- 1.2.3 Relationship between theory and practice

Part 1.3 Objectives of Reference Services

- 1.3.1 General objectives of reference services
- 1.3.2 Objectives in different library contexts (academic, public, special)
- 1.3.3 Objectives in the digital environment

Series Outline

- **Part 1.1 Evolution of Reference Services**
- **Part 1.2 Theoretical Foundations of Reference Services**
- **Part 1.3 Objectives of Reference Services**



Introduction

Libraries have always been more than repositories of books. From their earliest beginnings, they have served as centres where people seek guidance in locating and using information. Over time, the practice of reference services has evolved, shaped by changes in user needs, technological developments, and professional philosophies. This Series introduces you to the historical roots, theoretical foundations, and objectives of reference services, setting the stage for deeper exploration in later Series.

The aim of this Series is to provide you with a clear understanding of how reference services developed, the theories that underpin them, and the objectives they seek to achieve in different contexts.

We shall commence this Series by examining the evolution of reference services, tracing their beginnings and growth into contemporary practice. Next, we will move on to the theoretical foundations, defining the scope of reference services and exploring key theories that guide practice. Finally, we will conclude by considering the objectives of reference services, both in general and within specific library contexts, including the digital environment.

Series Learning Outcomes

Upon completing this Series, you should be able to:

- Describe the historical evolution of reference services,
- Explain the theoretical foundations and scope of reference services, and
- Analyse the objectives of reference services in different library contexts, including digital environments.

1.1 Evolution Of Reference Services

Reference services have a long and rich history. They began as informal assistance offered by librarians to readers, gradually developed into structured professional practice, and today form a central part of information services in libraries worldwide. Understanding this evolution helps you appreciate how reference services have adapted to changing user needs and technological contexts.

1.1.1 Early beginnings of reference work in libraries

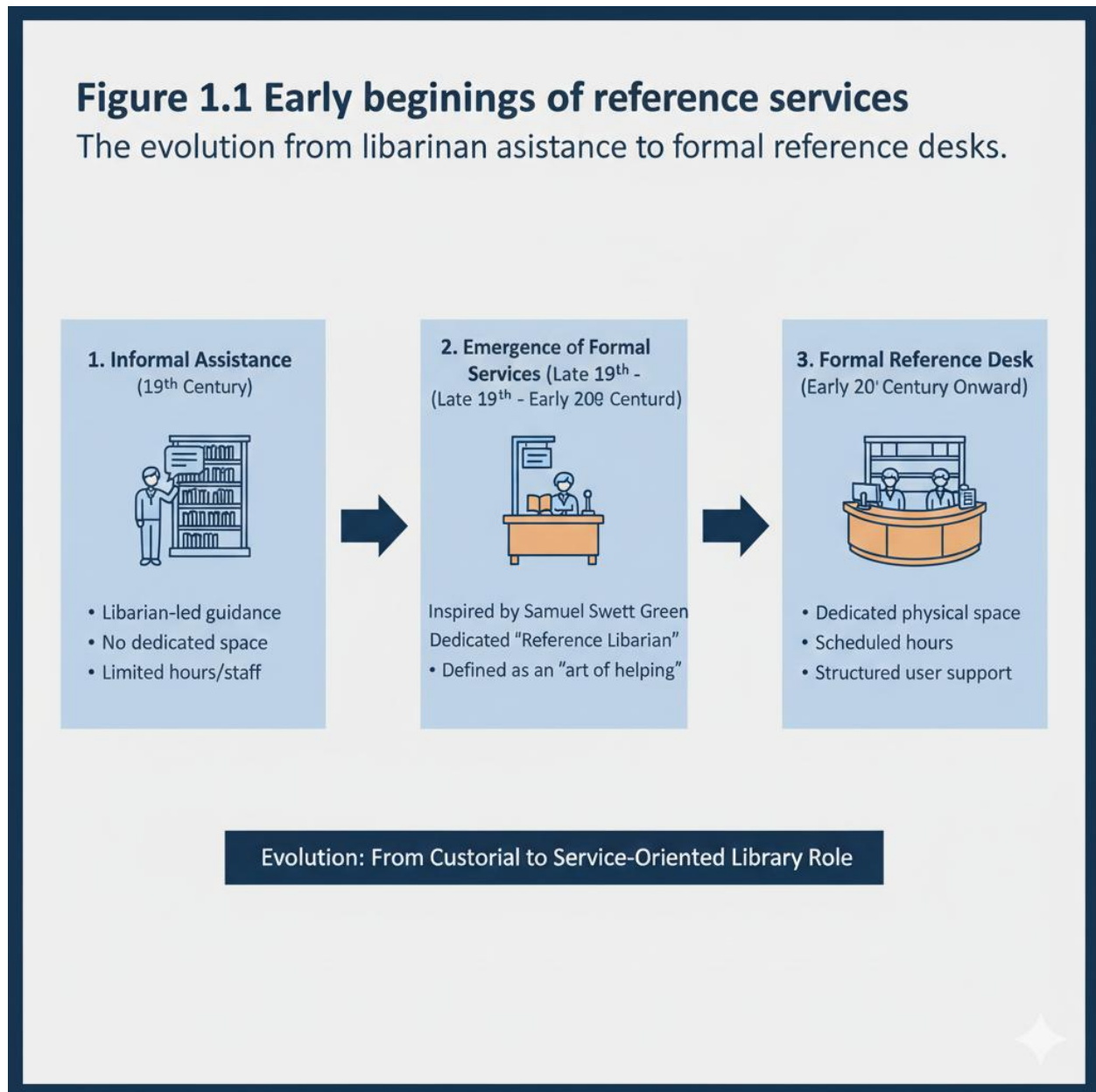
In the earliest libraries, assistance was often informal. Librarians or custodians guided readers to materials, explained catalogues, or helped interpret texts. Over time, this informal help became more systematic. **Reference work** refers to the professional activity of assisting users in finding and using information resources.

By the late nineteenth century, with the growth of public libraries, reference desks were established to provide dedicated support. This marked the beginning of reference services as a recognised function.

Fill in the blank:



- The establishment of _____ desks in public libraries marked the beginning of reference services as a recognised function.



1.1.2 Growth and development in the 20th century

The twentieth century saw rapid expansion of reference services. Libraries introduced **reference collections**, which are specialised sets of materials such as encyclopaedias, dictionaries, and bibliographies kept for quick consultation. Reference librarians also began to specialise, developing expertise in answering complex queries.

Technological innovations such as the telephone and later computers expanded the reach of reference services. Libraries could now respond to queries remotely, and databases provided new tools for literature searching.



Fill in the blank:

- Reference collections include specialised materials such as _____, dictionaries, and bibliographies.



1.1.3 Contemporary trends in reference services

In the twenty-first century, reference services have become increasingly digital. **Digital reference services** are those delivered through electronic means such as email, chat, or web portals. These services extend access beyond physical library spaces and allow users to receive assistance anytime and anywhere.

Libraries also embrace collaborative models, where reference services are shared across institutions. This ensures wider coverage and efficient use of resources.



Fill in the blank:

- Digital reference services are delivered through electronic means such as _____, chat, or web portals.

Box 1.1 Examples of contemporary digital reference services

A table listing modern digital reference services in libraries

Service Type	Key Features
Email Reference	• Real-time, synchronous help
• Asynchronous questions/answers • Detailed, research-based responses • 24/7 submission	• Real-time, synchronous help • Quick factual questions • Embedded in library website
Web Portals & FAQs	• Self-service knowledge bases • Curated guides & tutorials • Searchable Q&A archives

Pilot questions 1.1

1. The establishment of which feature in public libraries marked the beginning of formal reference services?
2. What types of materials are typically found in reference collections?
3. Which technological innovation first allowed libraries to respond to queries remotely?
4. Define digital reference services.



5. Give one example of a collaborative model in contemporary reference services.

1.2 Theoretical Foundations Of Reference Services

Reference services are not only practical activities but also guided by theories and principles that shape how they are delivered. Understanding these foundations helps you see why certain practices are adopted and how they contribute to effective information provision.

1.2.1 Definition and scope of reference services

Reference services are professional activities in libraries aimed at assisting users to locate, evaluate, and use information resources effectively. The scope of reference services includes answering questions, guiding literature searches, and providing access to specialised tools.

These services extend beyond simply pointing to books. They involve interpreting user needs, clarifying queries, and ensuring that information provided is accurate and relevant.

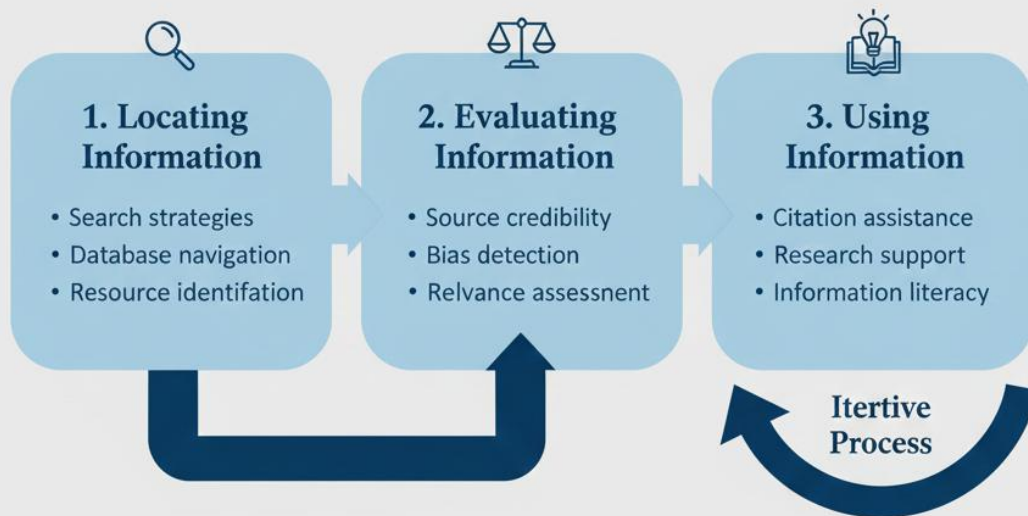
Fill in the blank:

- Reference services are professional activities aimed at assisting users to _____, evaluate, and use information resources.



Figure 1.2 Scope of reference services

A diagram illustrating the core functions of reference services.



1.2.2 Major theories underpinning reference work

Several theories guide reference practice. One is the **user-centred theory**, which emphasises tailoring services to the needs and behaviours of users. Another is the **information-seeking behaviour theory**, which studies how people search for and use information. These theories help librarians design services that are practical and responsive.

Theories also highlight the importance of communication. Effective reference work depends on clear interaction between librarian and user, ensuring that queries are properly understood and addressed.

Fill in the blank:



- The user-centred theory emphasises tailoring services to the _____ and behaviours of users.

Box 1.2 Selected theories underpinning reference services

A table listing user-centred theory and communication theory relevant to library reference.

Theory	Key Principles & Applications
1. User-Centred Theory , not just resources • Personalised service delivery • Empathy and accessibility	
2. Information-Seeking find info (e.g., Kuhlthau's ISP) • Recognising user's emotional & cognitive states • Matching resources to search stages	
3. Communication Theory skills • Active listening & questioning techniques • Building rapport & trust with users	

1.2.3 Relationship between theory and practice

Theory provides the framework, while practice applies it in real situations. For example, theories of information-seeking behaviour guide librarians in designing search strategies, while user-centred theory informs how services are personalised.

Without theory, practice may become inconsistent or ineffective. Conversely, without practice, theory remains abstract. The relationship between the two ensures that reference services are both conceptually sound and practically useful.

Fill in the blank:



- Without theory, practice may become _____ or ineffective.

Table 1.2 Relationship between theory and practice in reference services

A table showing how theory informs practice and practice validates theory.

Theoretical Principle	Practical Application in Reference Services
Focus on user needs, not just just resources; empathy & accessibility.	- Tailoring search strategies to individual queries - Creating accessible, inclusive service - Proactive outreach to users
Information-Seeking Behaviour Theory Users progress through stages (e.g., ISP); emotional & cognitive states impact search.	- Providing staged support (e.g. for research papers) - Offering reassurance & managing user - Diversifying resource formats (e.g, guides, tutorials)

Theory informs practice; practice validates & refines theory.

Pilot questions 1.2

- Define reference services in your own words.
- What are the three main activities included in the scope of reference services?
- Which theory emphasises tailoring services to user needs and behaviours?
- Why is communication important in reference work?
- How does practice validate theory in reference services?

1.3 Objectives Of Reference Services



Reference services are guided by clear objectives that ensure they meet the needs of users effectively. These objectives provide direction for librarians and help maintain consistency across different types of libraries.

1.3.1 General objectives of reference services

The primary objective of reference services is to facilitate access to information. **Access to information** means enabling users to locate, retrieve, and use resources that meet their needs. Other general objectives include promoting lifelong learning, supporting research, and encouraging effective use of library collections.

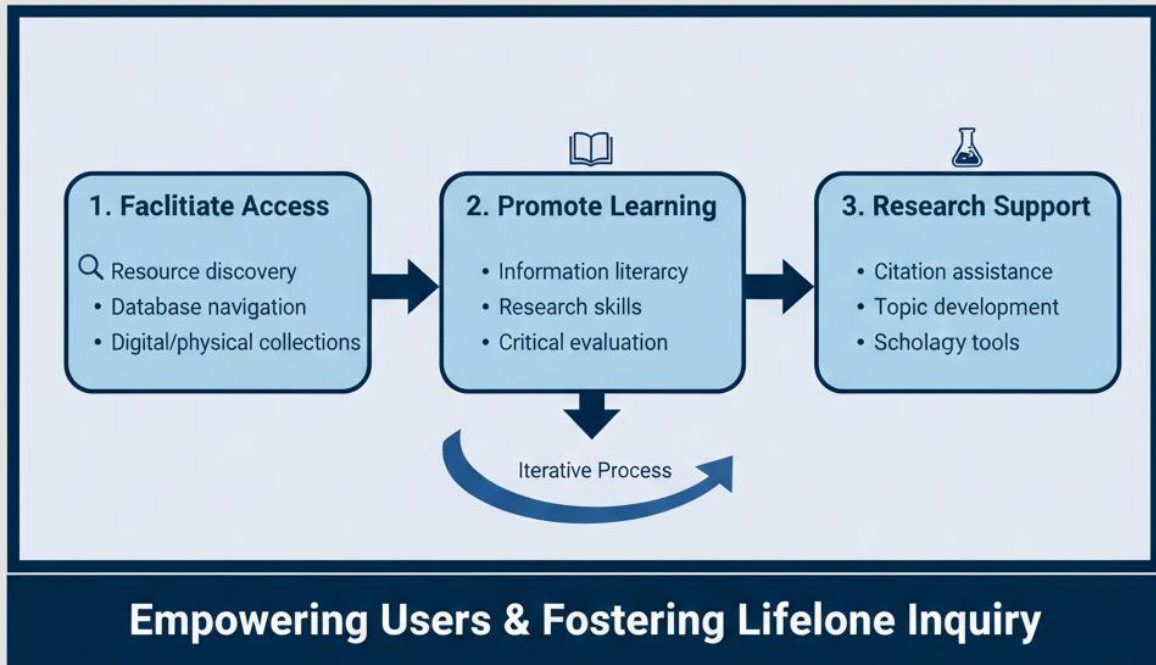
Fill in the blank:

- The primary objective of reference services is to facilitate _____ to information.



Figure 1.3 General objectives of reference services

A diagram illustrating the core goals of library reference support.



1.3.2 Objectives in different library contexts

Objectives vary depending on the type of library. In **academic libraries**, reference services aim to support teaching, learning, and research. In **public libraries**, the focus is on providing community information, recreational reading, and lifelong learning opportunities. In **special libraries**, objectives are tailored to the needs of specific organisations, such as businesses or government agencies.

Fill in the blank:

- In public libraries, reference services focus on providing _____ information and lifelong learning opportunities.



Table 1.3 Objectives of reference services services in different library contexts

A table comparing the core goals of reference services in various library settings

Library Type / Context	Primary Objectives & Focus Areas
1. Academic Libraries (University/College)	• Research Support: In-depth assistance for scholarly inquiry. • Information Literacy: Teaching research skills & critical evaluation.
2. Public Libraries (Community)	• Community Information: Local resources, events • Lifelong Learning: Support for publishing & data management • Digital Literacy: Support & experiential interests, skills. Basic internet help
3. Special Libraries Medical/Law/Corporate)	• Specialized Information: Curated updates on industries on industry/legal/medical changes • Decision Support: Timely, accurate data for professionals
4. School Libraries (K-12)	• Curriculum Support: Resources aligned with educational goals. Fostering a love of reading • Basic Information Skills: Early research & digital citizenship

1.3.3 Objectives in the digital environment

With the rise of technology, reference services now aim to provide seamless digital access.

Digital objectives include ensuring online availability of resources, offering virtual reference services, and supporting information literacy in digital contexts. These objectives help libraries remain relevant in a world where users increasingly rely on electronic resources.

Fill in the blank:

- Digital objectives include ensuring online availability of resources and offering _____ reference services.



Box 1.3 Objectives of reference services in the digital environment

Key goals of reference services in the digital library landscape

1. Online Availability & Access

- 24/7 access to digital collections and services
- Seamless access via web mobile, and apps
- Discovery of resources through search and browse

2. Virtual Reference Support

- Real-time chat and email reference
- Interactive FAQs and knowledge bases

3. Digital Literacy & Skills

- Support for digital information evaluation
- Training on using online databases and tools
- Promoting ethical digital citizenship

Pilot questions 1.3

1. What is the primary objective of reference services?
2. Name one objective of reference services in academic libraries.
3. What is the focus of reference services in public libraries?
4. Define digital objectives in reference services.
5. Give one example of a digital objective in reference services.

Series Summary



In this Series, we explored the **evolution, theory, and objectives of reference services**. We began by tracing the early beginnings of reference work, from informal assistance in libraries to the establishment of formal reference desks. We then examined the growth and development of reference services in the twentieth century, highlighting the introduction of reference collections and the impact of technological innovations. Finally, we considered contemporary trends, including digital reference services and collaborative models.

We moved on to the **theoretical foundations**, defining reference services and their scope, and discussing major theories such as user-centred theory and information-seeking behaviour theory. We also analysed the relationship between theory and practice, emphasising how each informs and validates the other.

The Series concluded with the **objectives of reference services**, beginning with general objectives like facilitating access to information and supporting lifelong learning. We then compared objectives across different library contexts—academic, public, and special—and finally examined objectives in the digital environment, such as online availability and virtual reference services.

By completing this Series, you should now be able to:

- Describe the historical evolution of reference services,
- Explain the theoretical foundations and scope of reference services, and
- Analyse the objectives of reference services in different contexts, including digital environments.

This knowledge provides a strong foundation for the next Series, where we will focus on **reference questions, tools, and personnel**, moving from the conceptual background into the practical aspects of delivering reference services.

Glossary Of Terms [Series 1]

Reference services Professional activities in libraries aimed at assisting users to locate, evaluate, and use information resources effectively.

Reference work The practice of helping users find and interpret information, often through direct interaction at a reference desk or via digital platforms.

Reference collections Specialised sets of materials such as encyclopaedias, dictionaries, and bibliographies kept for quick consultation in libraries.

Digital reference services Reference services delivered through electronic means such as email, chat, or web portals, extending access beyond physical library spaces.

Access to information The ability of users to locate, retrieve, and use resources that meet their information needs.

User-centred theory A theoretical approach that emphasises tailoring reference services to the needs and behaviours of users.

Information-seeking behaviour theory A theory that studies how individuals search for and use information, guiding librarians in designing effective services.



Communication theory A framework that highlights the importance of clear interaction between librarian and user to ensure queries are properly understood and addressed.

Digital objectives Goals of reference services in the digital environment, including online availability of resources, virtual reference, and support for digital literacy.

Concept Check Questions 1

Objective Questions

1. Which development marked the beginning of formal reference services in public libraries? *(Linked to SLO 1.1)*
2. Reference collections typically include encyclopaedias, _____, and bibliographies. *(Linked to SLO 1.1)*
3. Digital reference services are delivered through electronic means such as email, chat, or _____. *(Linked to SLO 1.1)*
4. The user-centred theory emphasises tailoring services to the _____ and behaviours of users. *(Linked to SLO 1.2)*
5. The primary objective of reference services is to facilitate _____ to information. *(Linked to SLO 1.3)*

Short-Answer Questions

6. Explain one way in which reference services evolved during the twentieth century. *(Linked to SLO 1.1)*
7. Define reference services and outline their scope. *(Linked to SLO 1.2)*
8. Give one example of an objective of reference services in academic libraries. *(Linked to SLO 1.3)*
9. What role does communication play in effective reference work? *(Linked to SLO 1.2)*
10. Identify one digital objective of reference services. *(Linked to SLO 1.3)*

Long-Answer Questions

11. Analyse the historical evolution of reference services, highlighting key milestones from informal beginnings to contemporary digital practice. *(Linked to SLO 1.1)*
12. Evaluate the importance of theories such as user-centred and information-seeking behaviour in shaping reference services. *(Linked to SLO 1.2)*
13. Discuss the objectives of reference services across academic, public, and special libraries, and explain how they differ. *(Linked to SLO 1.3)*
14. Assess the objectives of reference services in the digital environment and explain how they ensure relevance in modern contexts. *(Linked to SLO 1.3)*

Answers To Pilot Questions [Series 1]



Part 1.1 Evolution of Reference Services

1. The establishment of **reference desks** in public libraries.
2. Encyclopaedias, dictionaries, and bibliographies.
3. The **telephone**.
4. Reference services delivered through electronic means such as email, chat, or web portals.
5. Collaborative reference models, such as shared virtual reference services across institutions.

Part 1.2 Theoretical Foundations of Reference Services

1. Reference services are professional activities in libraries aimed at assisting users to locate, evaluate, and use information resources.
2. Locating, evaluating, and using information.
3. The **user-centred theory**.
4. Communication ensures queries are properly understood and addressed.
5. Practice validates theory by applying it in real situations and demonstrating its effectiveness.

Part 1.3 Objectives of Reference Services

1. To facilitate **access to information**.
2. Supporting teaching, learning, and research.
3. Providing **community information** and lifelong learning opportunities.
4. Digital objectives are goals of reference services in the digital environment, such as online availability and virtual reference.
5. Offering **virtual reference services**.

General References

- Bopp, R. E., & Smith, L. C. (2011). *Reference and information services: An introduction* (4th ed.). Santa Barbara, CA: Libraries Unlimited.
- Katz, W. A. (1997). *Introduction to reference work* (Vols. 1–2). New York: McGraw-Hill.
- Cassell, K. A., & Hiremath, U. (2018). *Reference and information services: An introduction* (5th ed.). Chicago: American Library Association.
- Ranganathan, S. R. (1961). *Reference service*. Bombay: Asia Publishing House.

Illustrations

Part 1.1 Evolution of Reference Services



- *Figure 1.1 Early beginnings of reference services:* AI prompt “Generate a diagram showing the evolution from informal librarian assistance to formal reference desks.” Search string: “history of reference services library diagram OER”.
- *Plate 1.1 Reference collections in the 20th century:* AI prompt “Generate an image of a library reference shelf with encyclopaedias and dictionaries.” Search string: “library reference collection encyclopaedia dictionary OER image”.
- *Box 1.1 Examples of contemporary digital reference services:* AI prompt “Generate a text box listing examples of contemporary digital reference services such as email, chat, and web portals.” Search string: “digital reference services examples library OER”.

Part 1.2 Theoretical Foundations of Reference Services

- *Figure 1.2 Scope of reference services:* AI prompt “Generate a diagram showing the scope of reference services: locating, evaluating, and using information.” Search string: “scope of reference services diagram OER”.
- *Box 1.2 Selected theories underpinning reference services:* AI prompt “Generate a text box listing selected theories underpinning reference services, including user-centred and information-seeking behaviour theories.” Search string: “theories of reference services library science OER”.
- *Table 1.2 Relationship between theory and practice in reference services:* AI prompt “Generate a table showing the relationship between theory and practice in reference services.” Search string: “relationship between theory and practice reference services OER”.

Part 1.3 Objectives of Reference Services

- *Figure 1.3 General objectives of reference services:* AI prompt “Generate a diagram showing general objectives of reference services: access, learning, and research support.” Search string: “objectives of reference services diagram OER”.
- *Table 1.3 Objectives of reference services in different library contexts:* AI prompt “Generate a table comparing objectives of reference services in academic, public, and special libraries.” Search string: “objectives of reference services academic public special libraries OER”.
- *Box 1.3 Objectives of reference services in the digital environment:* AI prompt “Generate a text box listing objectives of reference services in the digital environment.” Search string: “digital objectives reference services library OER”.

COURSE CODE LIS 313

COURSE TITLE: Reference and Information Services

COURSE UNIT LOAD 2 Units C: LH 15; PH 45

- **Series 1: Evolution, Theory, and Objectives of Reference and Information Services**



- **Series 2: Reference Questions, Tools, and Personnel**
- **Series 3: Techniques of Literature Searching and Types of Reference Services**
- **Series 4: Specialised Reference Services and Applications in Different Libraries**
- **Series 5: Organisation, Evaluation, and Digital Dimensions of Reference and Information Services**

Series 2: Reference Questions, Tools, and Personnel

2.1 Types Of Reference Questions

Reference questions are the foundation of reference services. They represent the needs of users and determine the kind of assistance librarians provide. By learning to classify and understand these questions, you will be able to select the right tools and strategies to respond effectively.

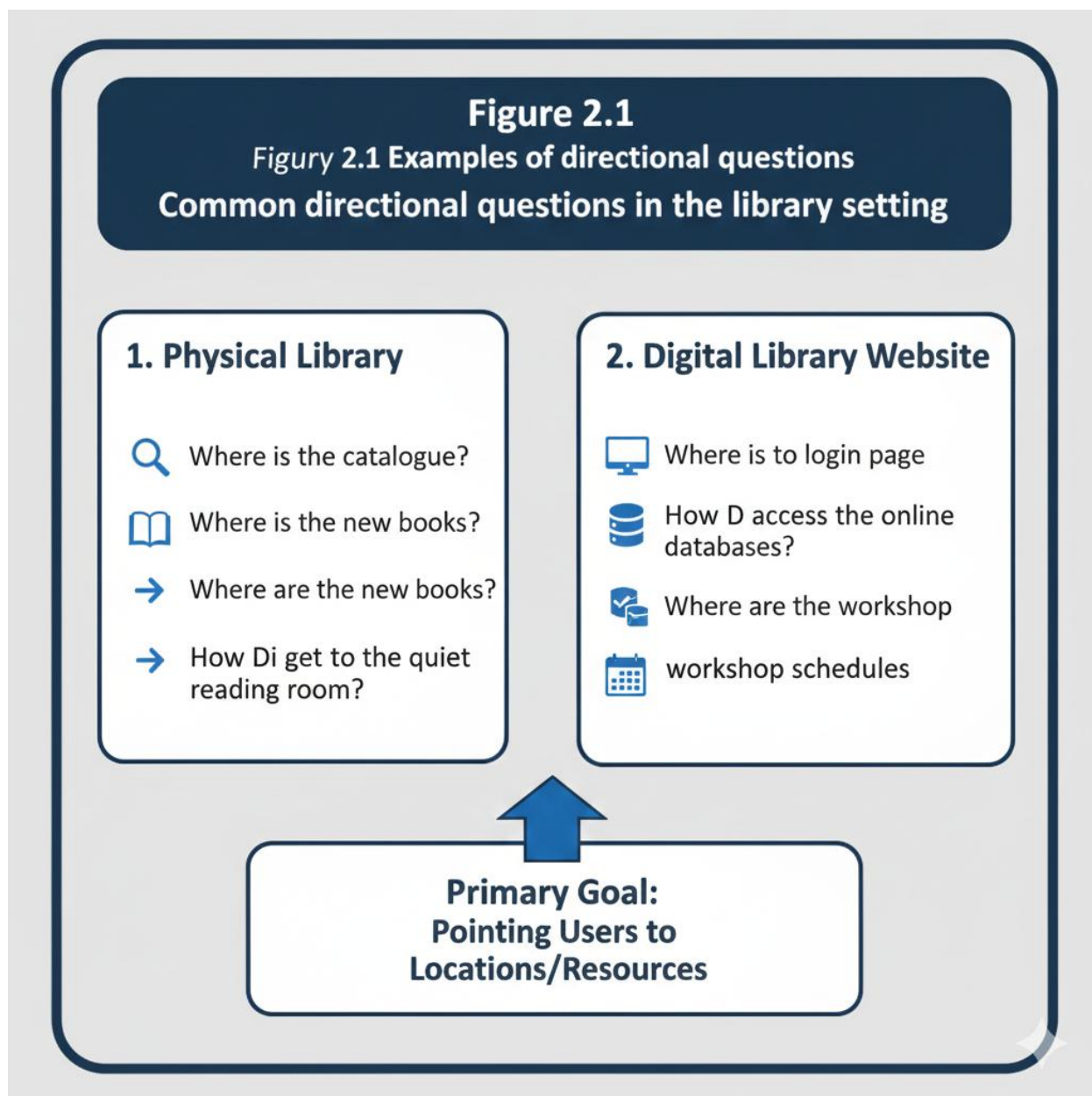
2.1.1 Directional questions

Directional questions are simple queries that ask for guidance within the library, such as where to find a book, how to use the catalogue, or the location of facilities. These questions do not require subject expertise but demand clear communication.

Fill in the blank:

- Directional questions usually ask for _____ within the library, such as locations or basic instructions.





2.1.2 Ready reference questions

Ready reference questions are queries that can be answered quickly using standard reference sources such as encyclopaedias, dictionaries, or almanacs. They often involve factual information like dates, definitions, or statistics.

Fill in the blank:

- Ready reference questions can usually be answered quickly using _____ sources such as encyclopaedias or dictionaries.





Plate 2.1 Ready reference in action

2.1.3 Long-range reference questions

Long-range reference questions are complex queries that require extended research. They may involve literature reviews, subject searches, or compiling bibliographies. These questions demand subject expertise and careful use of multiple sources.

Fill in the blank:

- Long-range reference questions often involve extended _____ such as literature reviews or bibliographies.



Table 2.1 Comparison of types of reference questions

A table comparing directional, and long-range questions.

Question Type	Complexity/Time	Sources Used
1. Directional Questions	Low complexity; <1 minute	Signs, maps, staff knowledge
2. Ready Reference Questions	Moderate complexity; 1-5 minutes	Encyclopedias, dictionaries, almanacs, online database databases (factual)
3. Long-Range Questions	High complexity; >5 minutes (research support)	Books, journal articles, archives, specialized databases; internet (critical evaluation)

Pilot questions 2.1

1. What type of reference question asks for guidance within the library?
2. Which sources are commonly used to answer ready reference questions?
3. What distinguishes long-range reference questions from ready reference questions?
4. Give one example of a directional question.
5. Why do long-range reference questions require subject expertise?

2.2 Tools For Offering Reference Services



Reference tools are the instruments librarians use to answer questions. They range from traditional print sources to modern electronic resources. Knowing these tools and their uses is essential for effective reference work.

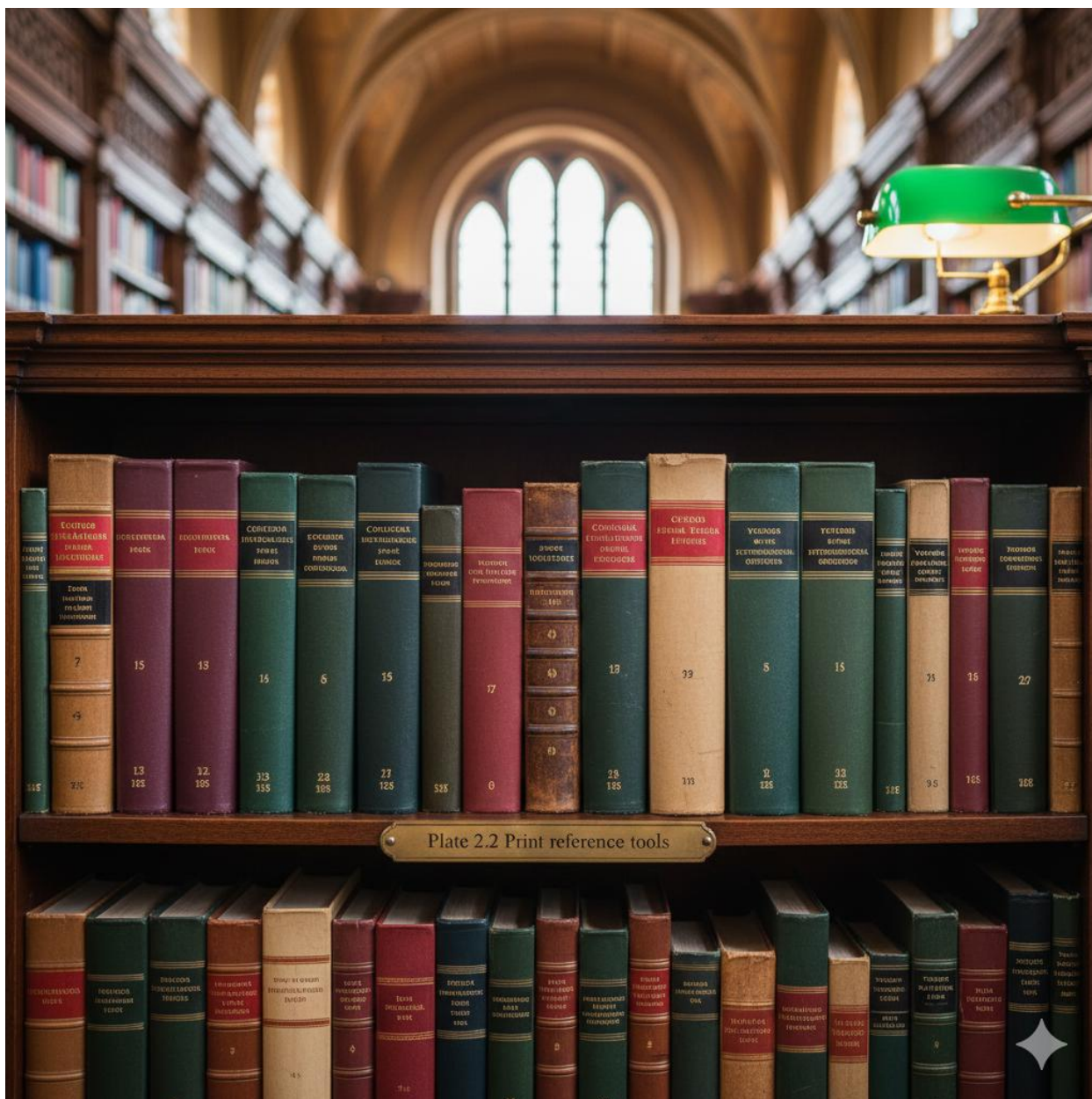
2.2.1 Print reference tools

Print reference tools include encyclopaedias, dictionaries, bibliographies, indexes, and directories. They remain valuable for quick consultation and for subjects where authoritative print sources are preferred.

Fill in the blank:

- Encyclopaedias, dictionaries, and bibliographies are examples of _____ reference tools.





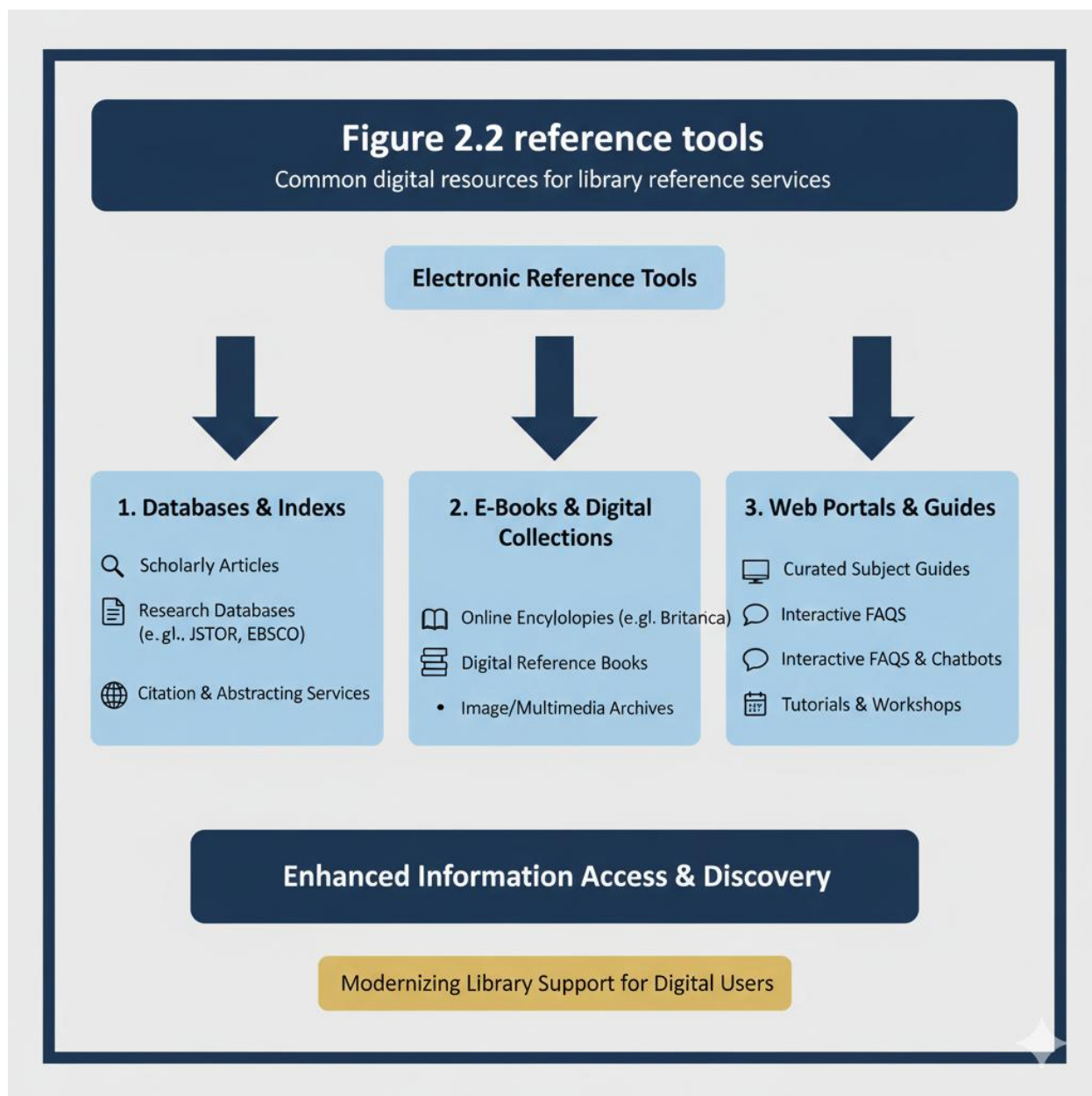
2.2.2 Electronic reference tools

Electronic reference tools are digital resources such as online databases, e-books, and web portals. They provide fast access to vast amounts of information and are increasingly preferred by users.

Fill in the blank:

- Electronic reference tools include online _____, e-books, and web portals.





2.2.3 Evaluation of reference tools

Effective reference work requires evaluating tools for accuracy, authority, currency, and relevance. **Evaluation** means assessing whether a tool provides reliable and useful information for the user's query.

Fill in the blank:

- Evaluation of reference tools involves checking for accuracy, authority, _____, and relevance.



Box 2.1 Criteria for evaluating reference tools

A table listing criteria such as currency, and relevance.

Criteria	
Criterion	Description
	Reliability and correctness of information; verify factual data.
Accuracy	Credibility of the source, author, or publisher; expertise in the subject.
Currency	Timeliness of information; how recently it was updated or revised.
Relevance	Appropriateness of the content for the user's information needs.
Scope	Coverage of the subject; depth and breadth of topics included.
Arrangement	Ease of use; logical organization, indexes, and searchability.
Cost/Access	Affordability and availability (e.g., free web resource, subscription database).

Pilot questions 2.2

1. Name three examples of print reference tools.
2. What are electronic reference tools?
3. List two criteria for evaluating reference tools.
4. Why are electronic reference tools increasingly preferred by users?
5. What does evaluation mean in the context of reference tools?

2.3 Qualities And Roles Of Reference Personnel



Reference services depend on the skills and attributes of the personnel who deliver them. Librarians must combine professional knowledge with interpersonal qualities to provide effective assistance.

2.3.1 Professional qualities

Professional qualities include subject expertise, knowledge of reference tools, and ability to conduct literature searches. These qualities ensure that librarians can provide accurate and reliable information.

Fill in the blank:

- Professional qualities include subject expertise and knowledge of _____ tools.

2.3.2 Personal qualities

Personal qualities are attributes such as patience, empathy, communication skills, and adaptability. These qualities help librarians build trust and rapport with users.

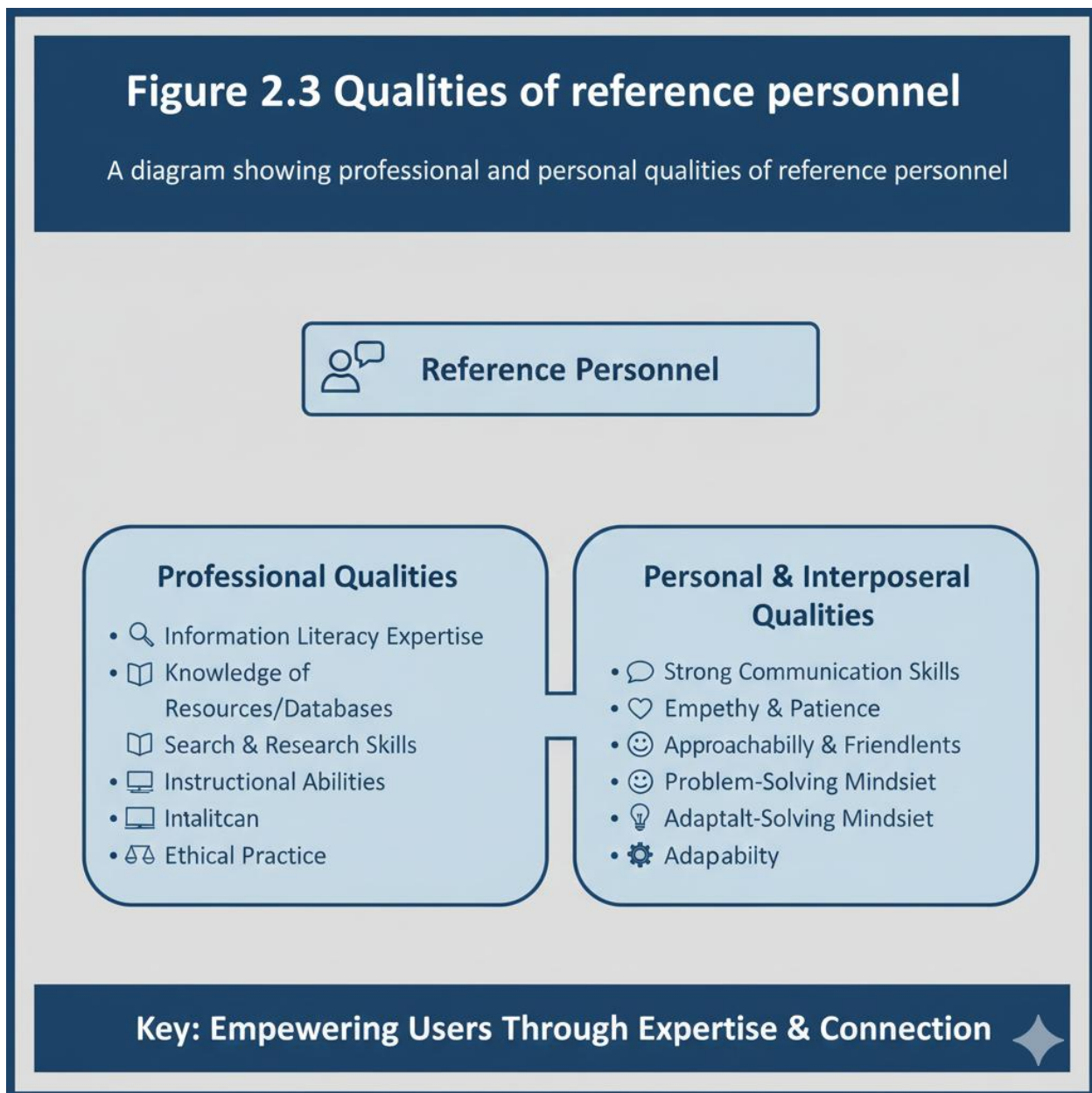
Fill in the blank:

- Personal qualities such as patience and _____ help librarians build rapport with users.



Figure 2.3 Qualities of reference personnel

A diagram showing professional and personal qualities of reference personnel



2.3.3 Roles of reference personnel

Reference personnel act as guides, educators, and facilitators. They help users articulate queries, teach information literacy skills, and ensure equitable access to resources.

Fill in the blank:

- Reference personnel act as guides, _____, and facilitators in the library.



Box 2.2 Roles of reference personnel

A table listing the multifaceted roles of reference personnel in modern libraries.

Role	Description
1. Guide	Assists users in navigating physical and digital information landscapes; point to resources and services
2. Educator	Teaches information literacy skills; provides instruction on using databases, research strategies, and evaluating sources
3. Facilitator	Connects users with the information need; creates the environment for discovery and learning; mediates access to resources
4. Advisor/Consultant	Provides personalized research support and expert advice for complex inquiries
5. Community Builder	Organizes programs and workshops; fosters connections between users and information

Pilot questions 2.3

1. What are professional qualities of reference personnel?
2. Give two examples of personal qualities important for reference work.
3. Why is empathy important in reference services?
4. List three roles of reference personnel.
5. How do professional and personal qualities complement each other in reference work?

Series Summary

In this Series, we examined the practical pillars of reference services: **reference questions, tools, and personnel.**



We began with the **types of reference questions**, distinguishing between directional, ready reference, and long-range questions. Directional questions involve simple guidance within the library, ready reference questions require quick factual answers from standard sources, and long-range questions demand extended research and subject expertise.

Next, we explored the **tools for offering reference services**. Print tools such as encyclopaedias, dictionaries, and bibliographies remain valuable, while electronic tools like databases, e-books, and web portals provide fast and wide access. We also discussed the importance of evaluating tools for accuracy, authority, currency, and relevance.

Finally, we focused on the **qualities and roles of reference personnel**. Professional qualities include subject expertise and knowledge of reference tools, while personal qualities such as patience, empathy, and communication skills ensure effective interaction with users. Reference personnel act as guides, educators, and facilitators, helping users articulate queries and develop information literacy skills.

By completing this Series, you should now be able to:

- Classify and explain different types of reference questions,
- Identify and evaluate tools used in offering reference services, and
- Analyse the qualities and roles of personnel in delivering effective reference services.

This prepares you for the next Series, where we will study **techniques of literature searching and types of reference services**, moving deeper into the methods librarians use to connect users with information.

Glossary Of Terms [Series 2]

Directional questions Simple queries that ask for guidance within the library, such as locations of materials or facilities.

Ready reference questions Questions that can be answered quickly using standard reference sources like encyclopaedias, dictionaries, or almanacs.

Long-range reference questions Complex queries requiring extended research, often involving literature reviews, subject searches, or bibliographies.

Print reference tools Traditional sources such as encyclopaedias, dictionaries, bibliographies, indexes, and directories used for quick consultation.

Electronic reference tools Digital resources including online databases, e-books, and web portals that provide fast access to information.

Evaluation of reference tools The process of assessing reference sources for accuracy, authority, currency, and relevance to user needs.

Professional qualities Skills and knowledge required of reference personnel, including subject expertise and familiarity with reference tools.

Personal qualities Attributes such as patience, empathy, communication skills, and adaptability that enhance user interaction.



Roles of reference personnel Functions performed by librarians in reference services, including guiding users, educating them in information literacy, and facilitating access to resources.

Concept Check Questions 2

Objective Questions

1. Which type of reference question involves simple guidance within the library? *(Linked to SLO 2.1)*
2. Ready reference questions are usually answered using _____ sources such as encyclopaedias or dictionaries. *(Linked to SLO 2.1)*
3. Long-range reference questions often involve extended _____ such as literature reviews or bibliographies. *(Linked to SLO 2.1)*
4. Print reference tools include encyclopaedias, dictionaries, and _____. *(Linked to SLO 2.2)*
5. Evaluation of reference tools involves checking for accuracy, authority, _____, and relevance. *(Linked to SLO 2.2)*

Short-Answer Questions

6. Define directional questions and give one example. *(Linked to SLO 2.1)*
7. Explain the difference between ready reference and long-range reference questions. *(Linked to SLO 2.1)*
8. Identify two examples of electronic reference tools. *(Linked to SLO 2.2)*
9. List two personal qualities that make reference personnel effective. *(Linked to SLO 2.3)*
10. What role does empathy play in reference services? *(Linked to SLO 2.3)*

Long-Answer Questions

11. Analyse the three types of reference questions, explaining how they differ in complexity and sources required. *(Linked to SLO 2.1)*
12. Evaluate the importance of print and electronic reference tools in modern libraries, highlighting their strengths and limitations. *(Linked to SLO 2.2)*
13. Discuss the criteria for evaluating reference tools and explain why each is important. *(Linked to SLO 2.2)*
14. Assess the professional and personal qualities of reference personnel, and explain how these qualities complement each other in delivering effective services. *(Linked to SLO 2.3)*
15. Examine the roles of reference personnel as guides, educators, and facilitators, and explain how these roles contribute to user satisfaction. *(Linked to SLO 2.3)*

Answers To Pilot Questions [Series 2]

Part 2.1 Types of Reference Questions



1. **Directional questions.**
2. Encyclopaedias and dictionaries.
3. **Extended research.**
4. Example: “Where is the catalogue?”
5. Because they require subject expertise and careful use of multiple sources.

Part 2.2 Tools for Offering Reference Services

1. Encyclopaedias, dictionaries, bibliographies.
2. **Digital resources** such as online databases, e-books, and web portals.
3. Accuracy and authority (also currency and relevance).
4. Because they provide fast access to vast amounts of information.
5. Assessing whether a tool provides reliable and useful information for the user’s query.

Part 2.3 Qualities and Roles of Reference Personnel

1. Subject expertise and knowledge of reference tools.
2. Patience and empathy.
3. Empathy helps librarians understand user needs and build rapport.
4. Guide, educator, facilitator.
5. Professional qualities ensure accuracy, while personal qualities ensure effective interaction, together making services successful.

General References

- Bopp, R. E., & Smith, L. C. (2011). *Reference and information services: An introduction* (4th ed.). Santa Barbara, CA: Libraries Unlimited.
- Katz, W. A. (1997). *Introduction to reference work* (Vols. 1–2). New York: McGraw-Hill.
- Cassell, K. A., & Hiremath, U. (2018). *Reference and information services: An introduction* (5th ed.). Chicago: American Library Association.
- Ranganathan, S. R. (1961). *Reference service*. Bombay: Asia Publishing House.

Illustrations

Part 2.1 Types of Reference Questions

- *Figure 2.1 Examples of directional questions:* AI prompt “Generate a diagram showing examples of directional questions in a library setting.” Search string: “directional reference questions library examples OER”.



- *Plate 2.1 Ready reference in action:* AI prompt “Generate an image of a librarian consulting a dictionary to answer a ready reference question.” Search string: “ready reference questions library encyclopaedia dictionary OER image”.
- *Table 2.1 Comparison of types of reference questions:* AI prompt “Generate a table comparing directional, ready reference, and long-range reference questions.” Search string: “types of reference questions comparison table OER”.

Part 2.2 Tools for Offering Reference Services

- *Plate 2.2 Print reference tools:* AI prompt “Generate an image of a library shelf with encyclopaedias, dictionaries, and directories.” Search string: “print reference tools library encyclopaedia dictionary OER image”.
- *Figure 2.2 Electronic reference tools:* AI prompt “Generate a diagram showing examples of electronic reference tools such as databases and e-books.” Search string: “electronic reference tools library databases ebooks OER”.
- *Box 2.1 Criteria for evaluating reference tools:* AI prompt “Generate a text box listing criteria for evaluating reference tools.” Search string: “evaluation of reference tools criteria library OER”.

Part 2.3 Qualities and Roles of Reference Personnel

- *Figure 2.3 Qualities of reference personnel:* AI prompt “Generate a diagram showing professional and personal qualities of reference personnel.” Search string: “qualities of reference librarians professional personal OER”.
- *Box 2.2 Roles of reference personnel:* AI prompt “Generate a text box listing roles of reference personnel in libraries.” Search string: “roles of reference librarians guide educator facilitator OER”.

COURSE CODE LIS 313

COURSE TITLE: Reference and Information Services

COURSE UNIT LOAD 2 Units C: LH 15

- **Series 1: Evolution, Theory, and Objectives of Reference and Information Services**
- **Series 2: Reference Questions, Tools, and Personnel**
- **Series 3: Techniques of Literature Searching and Types of Reference Services**
- **Series 4: Specialised Reference Services and Applications in Different Libraries**
- **Series 5: Organisation, Evaluation, and Digital Dimensions of Reference and Information Services**
- **Series 3: Techniques of Literature Searching and Types of Reference Services**

Series 3: Techniques of Literature Searching and Types of Reference Services



Series Outline

- **Part 3.1 Techniques of Literature Searching**
- **Part 3.2 Types of Reference Services**

Introduction

In the previous Series, you studied reference questions, the tools used to answer them, and the qualities of personnel who deliver these services. This Series now focuses on the **methods librarians use to connect users with information** and the **different forms of reference services available**.

We begin with **techniques of literature searching**, which are systematic approaches to locating relevant information in print and electronic sources. These techniques help ensure that searches are efficient, comprehensive, and tailored to user needs.

We then explore the **types of reference services**, ranging from traditional face-to-face assistance to modern digital and collaborative services. Understanding these types will help you appreciate the diversity of reference work and its adaptability to different contexts.

Series Learning Outcomes

Upon completing this Series, you should be able to:

- **SLO 3.1** apply techniques of literature searching to locate relevant information efficiently,
- **SLO 3.2** classify and explain different types of reference services, and
- **SLO 3.3** evaluate the strengths and limitations of various reference service models.

3.1 Techniques Of Literature Searching

Literature searching is a systematic process of locating information relevant to a user's query. It requires skill, patience, and knowledge of both print and electronic sources. By mastering these techniques, you will be able to conduct searches that are efficient, comprehensive, and tailored to specific needs.

3.1.1 Identifying the information need

The first step in literature searching is to **identify the information need**, which means clarifying exactly what the user requires. This involves asking probing questions, narrowing down the topic, and defining the scope of the search.

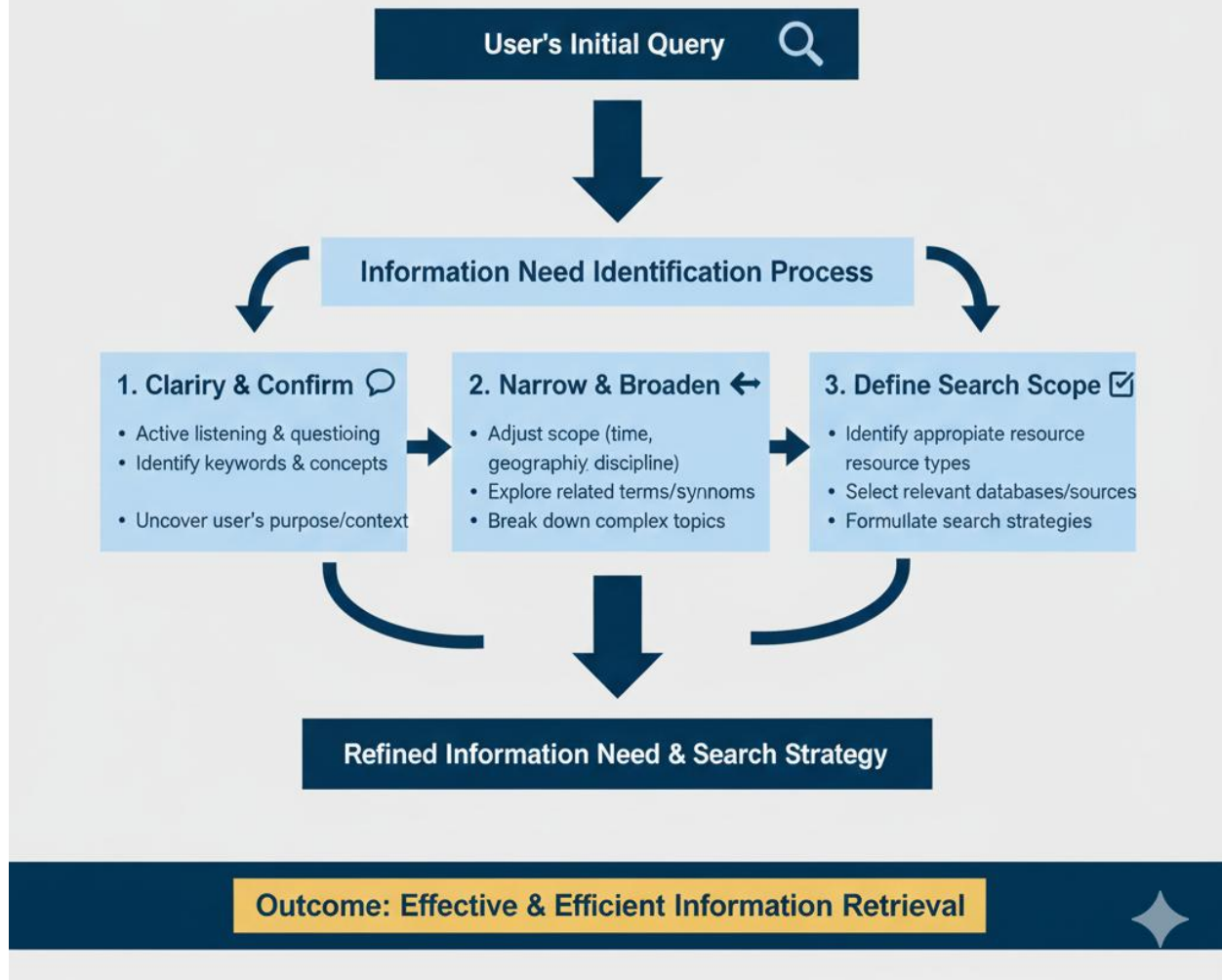
Fill in the blank:

- The first step in literature searching is to identify the _____ need.



Figure 3.1 Identifying the information need

A diagram outlining the process of understanding and refining a user's information requirement.



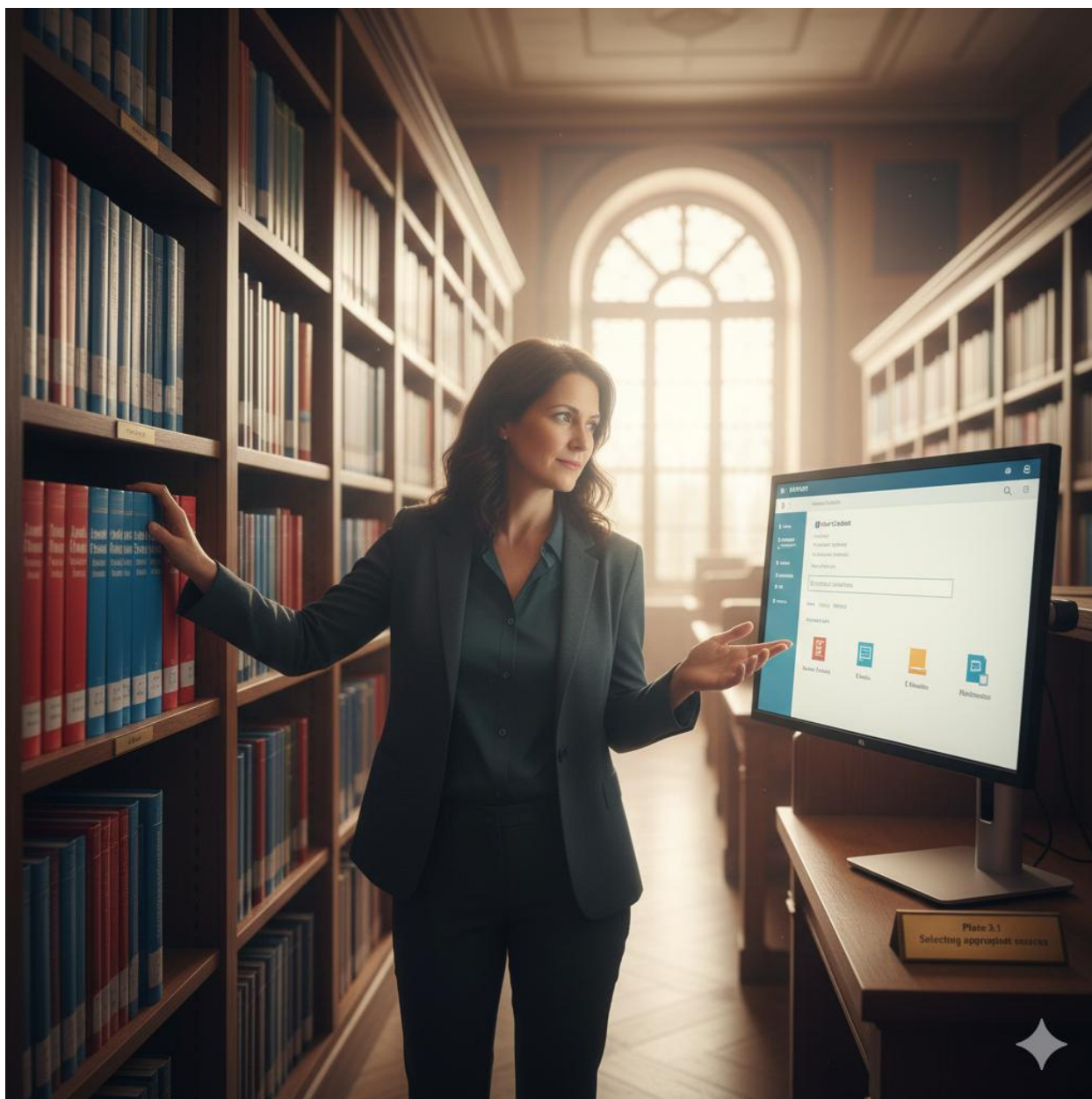
3.1.2 Selecting appropriate sources

Once the information need is clear, the next step is **selecting appropriate sources**. These may include print materials such as books and journals, or electronic resources such as databases and web portals. The choice depends on the subject, depth, and type of information required.

Fill in the blank:

- Selecting appropriate sources depends on the subject, depth, and type of _____ required.





3.1.3 Constructing search strategies

Search strategies are planned approaches to retrieving information. They involve using keywords, Boolean operators (AND, OR, NOT), truncation, and filters. A well-constructed search strategy ensures that results are relevant and manageable.

Fill in the blank:

- Boolean operators such as AND, OR, and NOT are used in constructing _____ strategies.



Box 3.1 Common search strategies

A table listing common techniques for effective information retrieval

Strategy	Description/Example
Keywords & Phrases	Natural language terms; use synonyms. Example change 'Or global warming effects'
Boolean Operators	'Combine or exclude terms (AND, NOT, power NOT wind)
Truncation/Wildcards	Find variations of a root word: "librar*" (finds library, libraries, librarian)
Phrase Searching	'digital literacy skills
Filters/Limiters Exact phrases, quotes	Refine results by date, format, subject, etc Example: 'articles > 2020 > peer-reviewed)
Subject Headings	'Control Subject Headings (e.g., MeSH, Diabetes Mellitus)

3.1.4 Evaluating search results

After retrieving information, it is important to **evaluate search results**. Evaluation involves checking for accuracy, authority, relevance, and currency. This ensures that the information meets the user's needs and is reliable.

Fill in the blank:

- Evaluating search results involves checking for accuracy, authority, relevance, and _____.



Table 3.1 Criteria for evaluating search results

A table comparing criteria such as accuracy, authority, and relevance for evaluating information.

Criterion	Description/Question to Ask	Example Application
1. Accuracy	Reliability and correctness of information; verify evidence or multiple sources.	Check if facts supported by actual data.
2. Authority	Check if of the source, author, or expertise in the subject.	Examine author's credentials or the publication.
3. Relevance	Appropriateness of the content authentic to expertise in topic in need.	Does the information directly address the research question or topic?
4. Currency	Does the information pertain to the user's information need.	Does the publication date was revised?
4. Objectivity/Bias	Timeliness of information; how how recently for fast-changing fields like technology.	Look for publication dates; important for fast-changing fields.
5. Objectivity/Bias	Consider the author's tone, purpose, funding, with other viewpoints.	Consider and compare other viewpoints.

3.1.5 Documenting and presenting search results

The final step is **documenting and presenting search results**. This means recording the sources consulted, summarising findings, and presenting them in a clear format. Documentation ensures transparency and allows the search to be replicated or updated.

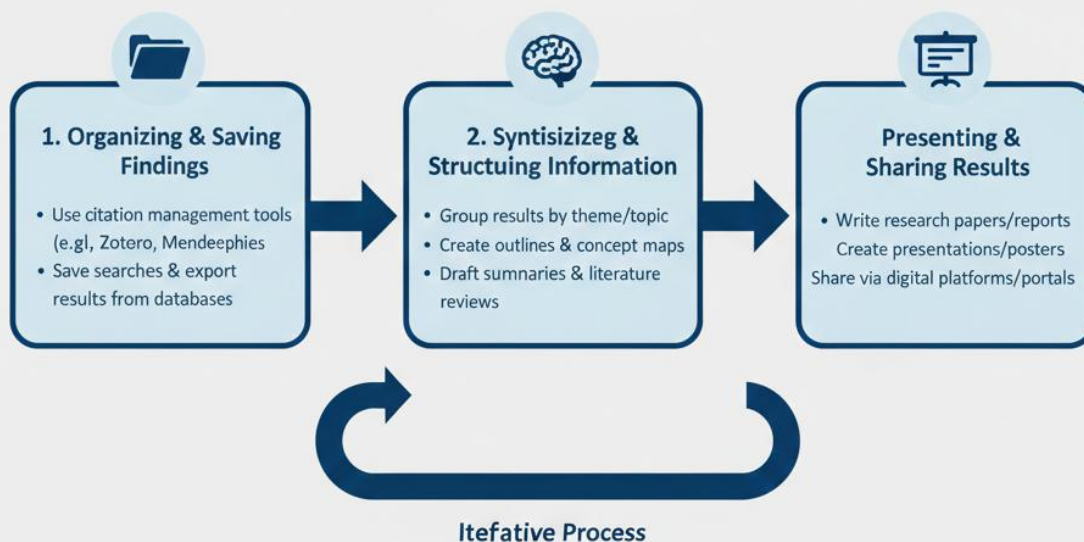
Fill in the blank:

- Documenting search results ensures _____ and allows replication of the search.



Figure 3.2 Documenting and presenting search results

A diagram outlining the process of organizing and sharing information effectively



Pilot questions 3.1

1. What is the first step in literature searching?
2. Why is selecting appropriate sources important?
3. Name two techniques used in constructing search strategies.
4. What criteria are used to evaluate search results?
5. Why is documentation important in literature searching?

3.2 Types Of Reference Services



Reference services are delivered in different forms depending on the needs of users, the resources available, and the context of the library. Understanding these types helps you appreciate the diversity of reference work and how it adapts to changing environments.

3.2.1 Traditional reference services

Traditional reference services involve face-to-face interaction between the librarian and the user, usually at a reference desk. This type of service allows for immediate clarification of queries and personalised assistance.

Fill in the blank:

- Traditional reference services usually take place at the _____ desk in the library.



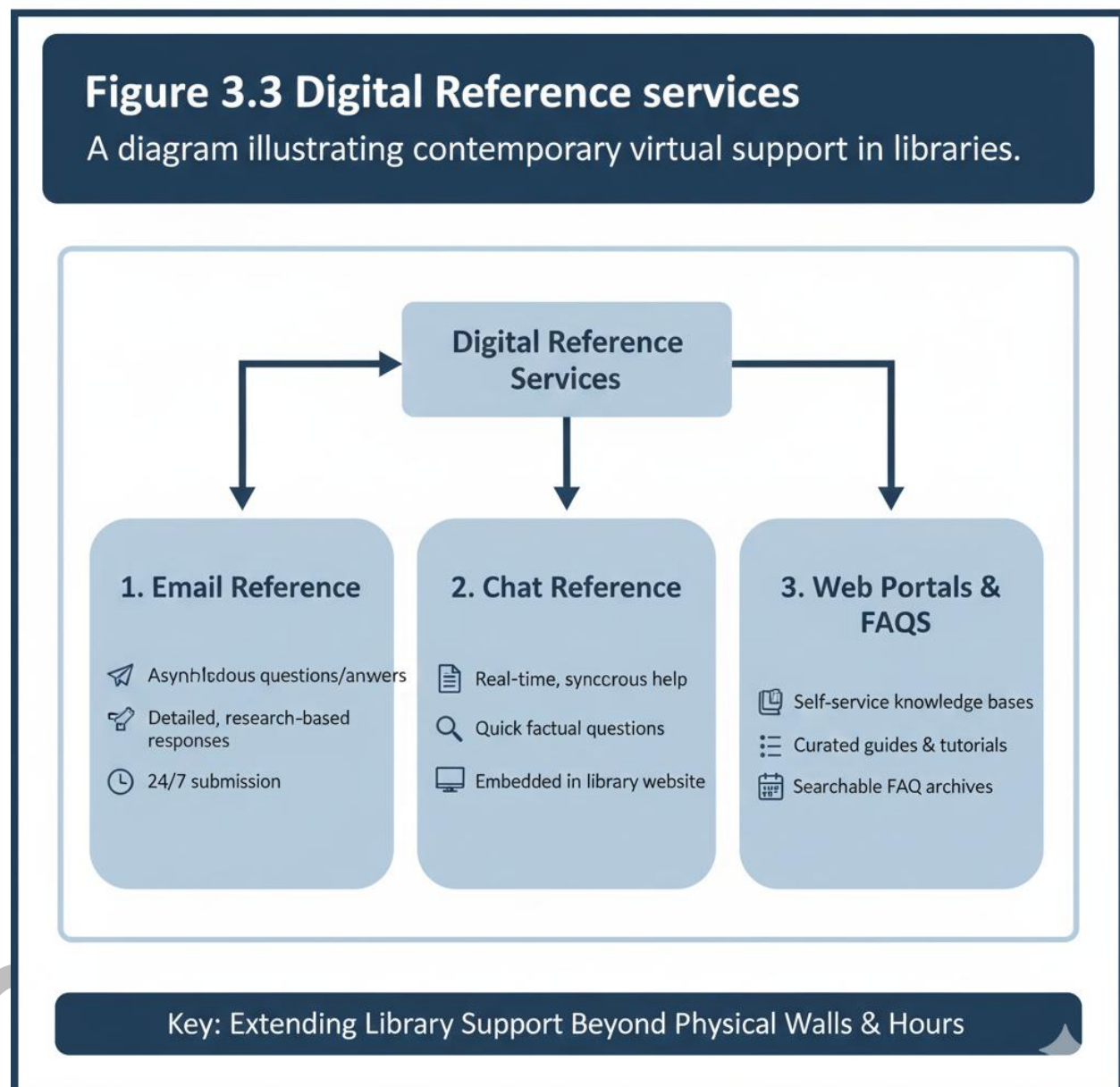
3.2.2 Digital reference services



Digital reference services are delivered through electronic means such as email, chat, or web portals. They extend access beyond the physical library and allow users to seek assistance remotely.

Fill in the blank:

- Digital reference services are delivered through electronic means such as email, chat, or _____.



3.2.3 Collaborative reference services

Collaborative reference services involve libraries working together to share expertise and resources. This may include consortia offering joint virtual reference services, or networks that allow librarians to answer questions across institutions.



Fill in the blank:

- Collaborative reference services involve libraries working together to share _____ and resources.

Box 3.2 Examples of collaborative reference services

A table listing examples of collaborative initiatives for library reference support.

Initiative	Description/Key Features
1. Library Consortia	Formal groups of libraries sharing resources; joint purchasing of databases, shared catalogues
2. Shared Virtual Reference	Librarians from multiple institutions staff a single chat/email svc., extended hours, broader expertise
2. Inter-Library Loan (ILL) Networks	(e.g.. QuestionPoint); (book articles) from other expertise
3. Inter-Library Loan local libraries	System for requesting materials (foster libraries; collections)

3.2.4 Outreach reference services

Outreach reference services are designed to reach users outside the library, such as in schools, community centres, or workplaces. They ensure that information support is available to those who may not visit the library physically.

Fill in the blank:

- Outreach reference services are designed to reach users _____ the library, such as in schools or community centres.



Table 3.2 Types of reference services and their characteristics

A table comparing a reference reference services by limitations.

Service Type	Mode of Delivery	Advantages	Limitations
	In-person at desk, desk, phone	Personalized, immediate, build rapport	Limited hours/- staff-dependent
Traditional Reference	Email, chat, web forms, FAQs	24/7 access, remote searchable archives	Less personal, ned digital literacy
Collaborative Reference	Shared virtual desks, ILL networks	Extended hours/expertise, resource sharing	Coordination challenges
Workshops Reference	Extended/expertise, resource sharing		differing policies
Workshops, embedded librarian, pop-up	Proactive, target specific users/needs	Resource intensive, time commitment	Resource time commitment
Evolving to meet diverse user needs across various platforms.			

Pilot questions 3.2

1. Where do traditional reference services usually take place?
2. Name two examples of digital reference services.
3. What is the main feature of collaborative reference services?
4. Give one example of outreach reference services.
5. Why are outreach services important in modern libraries?

Series Summary

In this Series, we focused on **techniques of literature searching and types of reference services**.



We began with **techniques of literature searching**, outlining the systematic steps involved: identifying the information need, selecting appropriate sources, constructing search strategies, evaluating search results, and documenting findings. Each step ensures that searches are efficient, comprehensive, and reliable.

We then examined the **types of reference services**, distinguishing between traditional, digital, collaborative, and outreach models. Traditional services emphasise face-to-face interaction at the reference desk, while digital services extend access through email, chat, and web portals. Collaborative services highlight the importance of libraries working together to share expertise, and outreach services ensure information support reaches users outside the library.

By completing this Series, you should now be able to:

- Apply techniques of literature searching to locate relevant information efficiently,
- Classify and explain different types of reference services, and
- Evaluate the strengths and limitations of various reference service models.

This prepares you for the next Series, where we will explore **Reference Interview and Communication Skills**, focusing on how librarians interact with users to clarify queries and deliver effective assistance.

Glossary Of Terms [Series 3]

Information need The specific requirement or problem a user wants to address through a literature search.

Search strategies Planned approaches to retrieving information, often involving keywords, Boolean operators, truncation, and filters.

Boolean operators Logical connectors (AND, OR, NOT) used in search strategies to combine or exclude keywords.

Evaluation of search results The process of assessing retrieved information for accuracy, authority, relevance, and currency.

Documentation of search results Recording and presenting the sources consulted and findings obtained to ensure transparency and replicability.

Traditional reference services Face-to-face assistance provided at a reference desk, allowing immediate clarification of queries.

Digital reference services Reference services delivered electronically through email, chat, or web portals, enabling remote access.

Collaborative reference services Services provided jointly by multiple libraries, sharing expertise and resources through consortia or networks.

Outreach reference services Reference services designed to reach users outside the library, such as in schools, workplaces, or community centres.

Concept Check Questions 3



Objective Questions

1. The first step in literature searching is to identify the _____ need. *(Linked to SLO 3.1)*
2. Boolean operators such as AND, OR, and NOT are used in constructing _____ strategies. *(Linked to SLO 3.1)*
3. Evaluating search results involves checking for accuracy, authority, relevance, and _____. *(Linked to SLO 3.1)*
4. Traditional reference services usually take place at the _____ desk. *(Linked to SLO 3.2)*
5. Digital reference services are delivered through electronic means such as email, chat, or _____. *(Linked to SLO 3.2)*

Short-Answer Questions

6. Explain why identifying the information need is the first step in literature searching. *(Linked to SLO 3.1)*
7. Give two examples of electronic sources that can be selected during literature searching. *(Linked to SLO 3.1)*
8. What is the main feature of collaborative reference services? *(Linked to SLO 3.2)*
9. Define outreach reference services and give one example. *(Linked to SLO 3.2)*
10. Why is documentation important in literature searching? *(Linked to SLO 3.1)*

Long-Answer Questions

11. Analyse the steps involved in literature searching, explaining how each contributes to effective information retrieval. *(Linked to SLO 3.1)*
12. Discuss the strengths and limitations of traditional and digital reference services, highlighting their relevance in modern libraries. *(Linked to SLO 3.2)*
13. Evaluate the importance of collaborative reference services in expanding access to expertise and resources. *(Linked to SLO 3.2)*
14. Examine the role of outreach reference services in ensuring equitable access to information, especially for underserved communities. *(Linked to SLO 3.2)*
15. Compare and contrast the different types of reference services, and explain how they complement each other in meeting diverse user needs. *(Linked to SLO 3.3)*

Answers To Pilot Questions [Series 3]

Part 3.1 Techniques of Literature Searching

1. The first step is to identify the **information need**.



2. Selecting appropriate sources is important because it ensures the information is relevant to the user's query.
3. Techniques include using **keywords** and **Boolean operators**.
4. Criteria include **accuracy, authority, relevance, and currency**.
5. Documentation is important because it ensures **transparency** and allows replication of the search.

Part 3.2 Types of Reference Services

1. Traditional reference services usually take place at the **reference desk**.
2. Examples of digital reference services include **email** and **chat**.
3. The main feature of collaborative reference services is **sharing expertise and resources across libraries**.
4. Example: Providing reference services in a **school** or **community centre**.
5. Outreach services are important because they ensure **equitable access to information** for users outside the library.

General References

- Bopp, R. E., & Smith, L. C. (2011). *Reference and information services: An introduction* (4th ed.). Santa Barbara, CA: Libraries Unlimited.
- Katz, W. A. (1997). *Introduction to reference work* (Vols. 1–2). New York: McGraw-Hill.
- Cassell, K. A., & Hiremath, U. (2018). *Reference and information services: An introduction* (5th ed.). Chicago: American Library Association.
- Ranganathan, S. R. (1961). *Reference service*. Bombay: Asia Publishing House.

Illustrations

Part 3.1 Techniques of Literature Searching

- *Figure 3.1 Identifying the information need:* AI prompt “Generate a diagram showing the process of identifying the information need: clarify, narrow, define scope.” Search string: “information need identification library search OER diagram”.
- *Plate 3.1 Selecting appropriate sources:* AI prompt “Generate an image of a librarian choosing between print journals and an online database.” Search string: “library selecting sources print electronic OER image”.
- *Box 3.1 Common search strategies:* AI prompt “Generate a text box listing common search strategies such as keywords, Boolean operators, truncation, and filters.” Search string: “search strategies library Boolean operators truncation filters OER”.



- *Table 3.1 Criteria for evaluating search results:* AI prompt “Generate a table comparing criteria for evaluating search results: accuracy, authority, relevance, currency.” Search string: “criteria for evaluating search results library OER table”.
- *Figure 3.2 Documenting and presenting search results:* AI prompt “Generate a diagram showing the process of documenting and presenting search results.” Search string: “documenting presenting search results library OER diagram”.

Part 3.2 Types of Reference Services

- *Plate 3.2 Traditional reference services at the desk:* AI prompt “Generate an image of a librarian assisting a user at a reference desk.” Search string: “traditional reference services library desk OER image”.
- *Figure 3.3 Digital reference services:* AI prompt “Generate a diagram showing examples of digital reference services such as email, chat, and web portals.” Search string: “digital reference services library examples OER diagram”.
- *Box 3.2 Examples of collaborative reference services:* AI prompt “Generate a text box listing examples of collaborative reference services such as consortia and shared virtual reference.” Search string: “collaborative reference services library consortia OER”.
- *Table 3.2 Types of reference services and their characteristics:* AI prompt “Generate a table comparing traditional, digital, collaborative, and outreach reference services by mode of delivery, advantages, and limitations.” Search string: “types of reference services comparison table OER”.



COURSE CODE LIS 313

COURSE TITLE: Reference and Information Services

COURSE UNIT LOAD 2 Units C: LH 15

- Series 1: Evolution, Theory, and Objectives of Reference and Information Services
- Series 2: Reference Questions, Tools, and Personnel
- Series 3: Techniques of Literature Searching and Types of Reference Services
- Series 4: Specialised Reference Services and Applications in Different Libraries
- Series 5: Organisation, Evaluation, and Digital Dimensions of Reference and Information Services

Series 4: Specialised Reference Services and Applications in Different Libraries

Part 4.1 Understanding the Reference Interview

- 4.1.1 Definition and purpose of the reference interview
- 4.1.2 Stages of the reference interview (opening, negotiation, closing)
- 4.1.3 Importance of active listening and questioning

Part 4.2 Communication Skills in Reference Services

- 4.2.1 Verbal communication (clarity, tone, questioning techniques)
- 4.2.2 Non-verbal communication (body language, eye contact, gestures)
- 4.2.3 Barriers to effective communication and how to overcome them

Part 4.3 Techniques for Effective Interaction

- 4.3.1 Building rapport with users
- 4.3.2 Handling difficult or ambiguous queries
- 4.3.3 Cultural sensitivity and inclusive communication

Part 4.4 Evaluating and Improving Reference Communication

- 4.4.1 Assessing the success of the reference interview
- 4.4.2 Feedback and reflection for continuous improvement
- 4.4.3 Role of technology in enhancing communication

Introduction



Imagine walking into a library with a question in mind but struggling to explain exactly what you need. The librarian's ability to guide you through that uncertainty, ask the right questions, and communicate clearly is what transforms a vague query into a meaningful answer. This process, known as the **reference interview**, is at the heart of effective reference services. Strong communication skills ensure that users feel understood, respected, and supported, making this Series a vital part of your learning journey.

The aim of this Series is to equip you with the knowledge and skills required to conduct effective reference interviews and to develop communication techniques that enhance user satisfaction and service delivery.

We shall commence this Series by exploring the meaning, purpose, and stages of the reference interview. Next, we will examine communication skills in reference services, focusing on both verbal and non-verbal aspects as well as barriers to effective communication. Following that, we will consider techniques for effective interaction, including building rapport, handling difficult queries, and practising cultural sensitivity. Finally, we will wrap up by looking at how reference communication can be evaluated and improved, with attention to feedback, reflection, and the role of technology.

Series Learning Outcomes [

Upon completing this Series, you should be able to:

- **SLO 4.1** define the concept and purpose of the reference interview,
- **SLO 4.2** explain the stages of the reference interview, including opening, negotiation, and closing,
- **SLO 4.3** demonstrate effective verbal communication techniques in reference services,
- **SLO 4.4** analyse the role of non-verbal communication in building user trust and understanding,
- **SLO 4.5** identify barriers to effective communication and propose strategies to overcome them,
- **SLO 4.6** apply techniques for building rapport and handling difficult or ambiguous queries,
- **SLO 4.7** evaluate the importance of cultural sensitivity and inclusive communication in reference interactions, and
- **SLO 4.8** assess methods for evaluating and improving reference communication, including feedback, reflection, and the use of technology.

4.1 Understanding the Reference Interview

The **reference interview** is the structured conversation between a librarian and a user that helps clarify the user's information need. It is a cornerstone of effective reference services because users often approach the library with vague or incomplete queries. Through careful questioning and attentive listening, the librarian guides the user toward a clear, actionable request.

4.1.1 Definition and purpose of the reference interview



The reference interview is defined as the process of interaction between the librarian and the user to determine the exact information need. Its purpose is to ensure that the librarian fully understands the query before attempting to provide resources or answers.

Fill in the blank:

- The reference interview is the process of interaction between the librarian and the _____.

4.1.2 Stages of the reference interview

The reference interview typically has three stages:

- **Opening:** Establishing rapport and encouraging the user to express their need.
- **Negotiation:** Asking clarifying questions, rephrasing, and narrowing down the query.
- **Closing:** Summarising the agreed need and directing the user to appropriate resources.

Fill in the blank:

- The three stages of the reference interview are opening, negotiation, and _____.

4.1.3 Importance of active listening and questioning

Active listening and questioning are essential in the reference interview. Listening attentively helps the librarian capture nuances in the user's request, while questioning techniques (open-ended and closed) help clarify and refine the query.

Fill in the blank:

- Active listening and questioning are essential in the _____ interview.

Pilot questions 4.1

1. What is the purpose of the reference interview?
2. Name the three stages of the reference interview.
3. Why is active listening important in the reference interview?
4. Give one example of a questioning technique used in the reference interview.
5. What happens during the closing stage of the reference interview?

4.2 Communication Skills in Reference Services

Effective communication is the backbone of successful reference services. Librarians must not only understand the user's query but also convey information clearly, respectfully, and in a way that builds trust. Communication in this context involves both **verbal** and **non-verbal** elements, as well as strategies to overcome barriers that may hinder understanding.

4.2.1 Verbal communication

Verbal communication includes the words, tone, and questioning techniques used during the reference interview. Clear language, appropriate tone, and well-structured questions help ensure that users feel comfortable and understood.

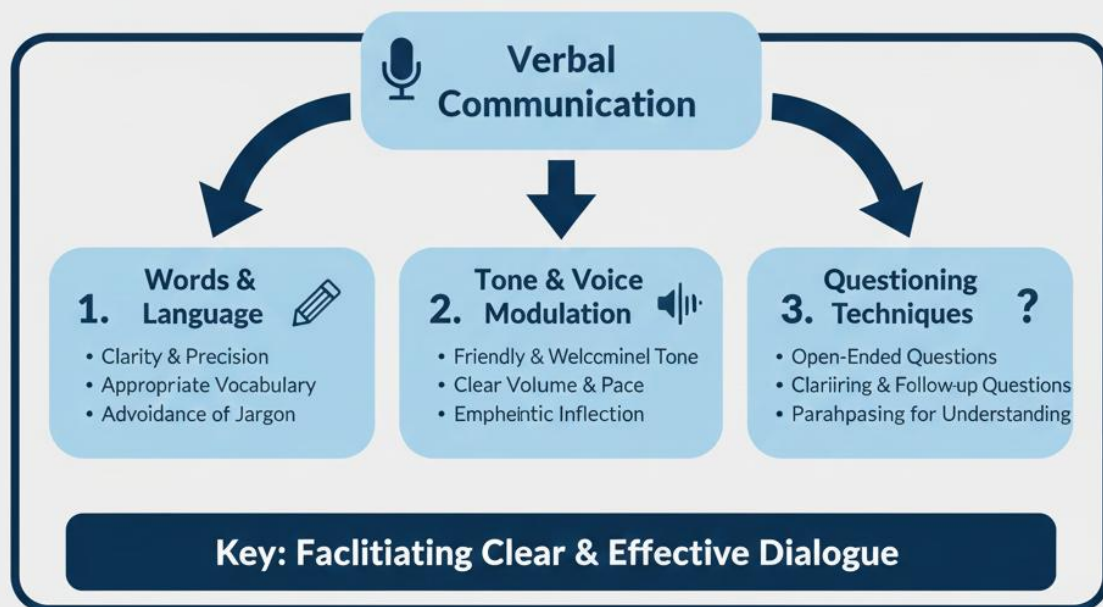


Fill in the blank:

- Verbal communication includes the words, tone, and _____ techniques used during the reference interview.

Figure 4.2 Elements of verbal communication

A diagram illustrating the key components of effective spoken interaction in library reference.



The Power of Spoken Exchange in Libraries

4.2.2 Non-verbal communication

Non-verbal communication involves body language, facial expressions, gestures, and eye contact. These cues often reinforce or contradict verbal messages, making them critical in building rapport and trust with users.

Fill in the blank:

- Non-verbal communication involves body language, facial expressions, gestures, and _____ contact.



4.2.3 Barriers to effective communication

Barriers to communication may include language differences, noise, distractions, or assumptions made by either party. Librarians must recognise these barriers and adopt strategies such as rephrasing, simplifying language, or using visual aids to overcome them.

Fill in the blank:

- Barriers to communication may include language differences, noise, distractions, or _____.

Box 4.2

Common barriers to communication

A text box listing common barriers to effective communication in library reference services.

1. Language & Cultural Differences

- Varying linguistic proficiencies
- Jargon & technical terminology
- Cultural norms impacting directness & questioning

Environmental Factors

- Loud noise & distractions in the library space
- Physical barriers (e.g., desk, computer screens)
- Lack of privacy for sensitive inquiries

3. Assumptions & Misunderstandings

- Librarian assumes user's knowledge level
- User assumes librarian knows the exact answer
- Misinterpretations of verbal & non-verbal cues

4. Emotional & Psychological Factors

- User anxiety, frustration, or hesitation
- Librarian stress or fatigue
- Lack of rapport & trust

Pilot questions 4.2

1. What are the key elements of verbal communication in reference services?



2. Give two examples of non-verbal communication.
3. Why is eye contact important in reference services?
4. List two barriers to effective communication.
5. How can librarians overcome communication barriers?

4.3 Techniques for Effective Interaction

Beyond communication skills, librarians must employ specific techniques to ensure that reference interactions are productive, supportive, and inclusive. These techniques help build trust, manage challenging situations, and ensure that all users feel respected and valued.

4.3.1 Building rapport with users

Building rapport involves creating a welcoming atmosphere where users feel comfortable expressing their needs. This can be achieved through friendliness, empathy, and showing genuine interest in the user's query.

Fill in the blank:

- Building _____ involves creating a welcoming atmosphere where users feel comfortable expressing their needs.

4.3.2 Handling difficult or ambiguous queries

Users may sometimes present queries that are unclear, overly broad, or emotionally charged. Librarians must remain patient, ask clarifying questions, and guide the user toward a manageable and precise information need.

Fill in the blank:

- Difficult or ambiguous queries require patience and _____ questions to clarify the user's need.

4.3.3 Cultural sensitivity and inclusive communication

Libraries serve diverse communities, so cultural sensitivity is essential. Inclusive communication involves respecting differences in language, background, and perspectives, and ensuring that all users feel valued.

Fill in the blank:

- Cultural sensitivity in reference services ensures that all users feel _____ and respected.

Pilot questions 4.3

1. What does building rapport with users involve?
2. How should librarians handle ambiguous queries?
3. Why is cultural sensitivity important in reference services?
4. Give one example of inclusive communication practice.



5. What role does empathy play in building rapport?

4.4 Evaluating and Improving Reference Communication

Reference communication does not end with the interview itself. Librarians must continually assess the effectiveness of their interactions, reflect on feedback, and adopt new tools or methods to improve service quality. This ensures that reference services remain responsive, professional, and user-centred.

4.4.1 Assessing the success of the reference interview

Assessment involves determining whether the user's information need was accurately identified and satisfactorily met. Success can be measured by user satisfaction, clarity of the outcome, and the appropriateness of the resources provided.

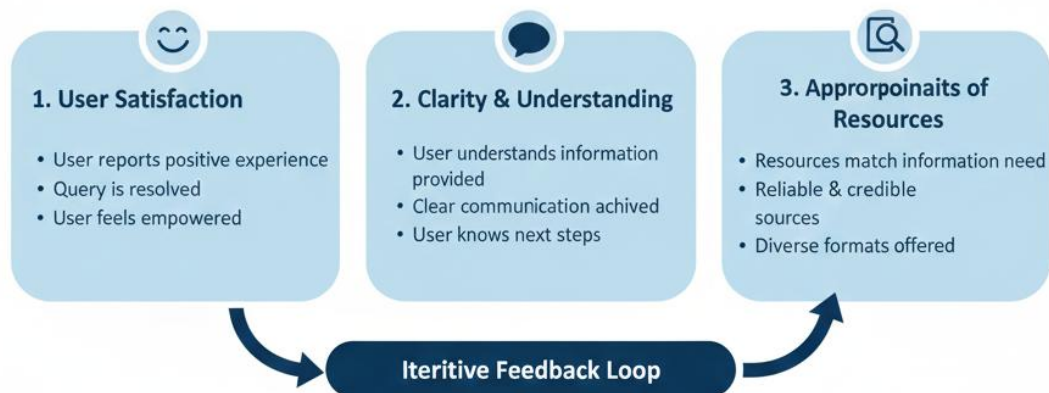
Fill in the blank:

- Assessing the success of the reference interview involves determining whether the user's _____ need was met.



Figure 4.4 Assessing the success of the reference interview

A diagram illustrating for criteria for criteria for ea the effectiveness of a reference interaction.



4.4.2 Feedback and reflection for continuous improvement

Feedback from users and self-reflection by librarians are vital for continuous improvement. Constructive feedback highlights strengths and areas for growth, while reflection helps librarians refine their communication style and strategies.

Fill in the blank:

- Feedback and _____ are vital for continuous improvement in reference communication.

4.4.3 Role of technology in enhancing communication



Technology plays a growing role in reference communication. Tools such as chatbots, virtual reference platforms, and video conferencing expand access and allow librarians to serve users more efficiently.

Fill in the blank:

- Technology tools such as chatbots and virtual reference platforms expand _____ and efficiency in communication.

Pilot questions 4.4

1. What criteria can be used to assess the success of a reference interview?
2. Why is feedback important in reference communication?
3. Give one method of reflection that librarians can use.
4. Name two technology tools that enhance reference communication.
5. How does technology improve efficiency in reference services?

Series Summary [Series 4: Reference Interview and Communication]

In this Series, we examined the **reference interview and communication skills**, which are central to effective reference services. We began by defining the reference interview, exploring its purpose, and breaking down its stages into opening, negotiation, and closing. We also highlighted the importance of active listening and questioning in clarifying user needs.

We then turned to **communication skills**, focusing on verbal and non-verbal elements. You learned how tone, questioning techniques, body language, and eye contact contribute to successful interactions, as well as how to recognise and overcome barriers such as language differences or distractions.

Following that, we explored **techniques for effective interaction**, including building rapport, handling difficult or ambiguous queries, and practising cultural sensitivity to ensure inclusive communication. Finally, we wrapped up with **evaluating and improving reference communication**, where we considered how to assess success, use feedback and reflection for continuous improvement, and leverage technology to enhance service delivery.

By completing this Series, you should now be able to:

- Define the concept and purpose of the reference interview,
- Demonstrate effective verbal and non-verbal communication skills,
- Apply techniques for rapport building and inclusive interaction, and
- Evaluate and improve reference communication using feedback and technology.

Glossary of Terms [Series 4: Reference Interview and Communication]

Reference interview A structured conversation between a librarian and a user aimed at clarifying the user's information need.



Opening stage The initial phase of the reference interview where rapport is established and the user begins to express their query.

Negotiation stage The middle phase of the reference interview where clarifying questions are asked and the query is refined.

Closing stage The final phase of the reference interview where the librarian summarises the agreed need and directs the user to resources.

Active listening The practice of attentively hearing and interpreting a user's words, tone, and intent to fully understand their query.

Questioning techniques Methods used to clarify user needs, including open-ended questions (to expand) and closed questions (to narrow).

Verbal communication The use of words, tone, and questioning techniques to convey meaning during reference interactions.

Non-verbal communication The use of body language, facial expressions, gestures, and eye contact to reinforce or complement verbal communication.

Barriers to communication Obstacles such as language differences, noise, distractions, or assumptions that hinder effective interaction.

Rapport building Creating a welcoming and empathetic atmosphere that encourages users to share their information needs openly.

Cultural sensitivity Respecting and valuing differences in language, background, and perspectives to ensure inclusive communication.

Feedback Constructive input from users or peers that highlights strengths and areas for improvement in reference communication.

Reflection Self-assessment by librarians to evaluate their communication style and refine their interaction techniques.

Virtual reference services Technology-based platforms such as chatbots, email, or video conferencing that extend communication beyond the physical library.

COURSE CODE LIS 313

COURSE TITLE: Reference and Information Services

COURSE UNIT LOAD 2 Units C: LH 15

- **Series 1: Evolution, Theory, and Objectives of Reference and Information Services**
- **Series 2: Reference Questions, Tools, and Personnel**
- **Series 3: Techniques of Literature Searching and Types of Reference Services**
- **Series 4: Specialised Reference Services and Applications in Different Libraries**



• Series 5: Organisation, Evaluation, and Digital Dimensions of Reference and Information Services

Part 5.1 Types of Reference Sources

- 5.1.1 Dictionaries and encyclopaedias
- 5.1.2 Yearbooks, almanacs, and directories
- 5.1.3 Bibliographies and indexes
- 5.1.4 Electronic and online reference sources

Part 5.2 Characteristics of Good Reference Sources

- 5.2.1 Accuracy and authority
- 5.2.2 Currency and relevance
- 5.2.3 Organisation and accessibility

Part 5.3 Evaluation of Reference Sources

- 5.3.1 Criteria for evaluating print sources
- 5.3.2 Criteria for evaluating electronic sources
- 5.3.3 Comparative strengths and limitations

Part 5.4 Application of Reference Sources in Services

- 5.4.1 Matching sources to user needs
- 5.4.2 Case examples of source utilisation
- 5.4.3 Integrating sources into digital reference services

Introduction

Every library user depends on reliable sources to answer their questions, whether they are seeking a quick fact, an in-depth explanation, or guidance for research. The quality of reference services therefore rests heavily on the librarian's ability to identify, evaluate, and apply appropriate reference sources. This Series focuses on those sources, helping you to appreciate their variety and understand how they are used in practice.

The aim of this Series is to introduce you to the major types of reference sources, highlight the characteristics that make them effective, and equip you with the skills to evaluate and apply them in delivering reference services.

We shall commence this Series by exploring the different types of reference sources, including dictionaries, encyclopaedias, yearbooks, directories, bibliographies, and electronic resources. Next, we will examine the characteristics of good reference sources, focusing on accuracy, authority, currency, and accessibility. Following that, we will consider how to evaluate both print and electronic sources, comparing their strengths and limitations. Finally, we will wrap up by looking at how reference sources are applied in services, with examples of matching sources to user needs and integrating them into digital platforms.



Series Learning Outcomes [Series 5: Reference Sources and Their Evaluation]

Upon completing this Series, you should be able to:

- Define the major types of reference sources, including dictionaries, encyclopaedias, yearbooks, directories, bibliographies, and electronic resources,
- Explain the key characteristics of good reference sources such as accuracy, authority, currency, and accessibility,
- Evaluate print reference sources using established criteria for quality and reliability,
- Evaluate electronic reference sources by analysing their strengths, limitations, and usability, and
- Apply reference sources appropriately to match user needs and integrate them into reference services.

5.1 Types of Reference Sources

Reference sources are the backbone of library services, providing quick, reliable, and authoritative information to users. They are designed to answer specific questions, supply factual data, and guide further research. In this Part, we will explore the major categories of reference sources, each serving a distinct purpose in meeting user needs.

5.1.1 Dictionaries and encyclopaedias

A **dictionary** is a reference source that provides definitions, spellings, pronunciations, and sometimes usage examples of words. Dictionaries may be general, covering everyday language, or specialised, focusing on a particular field such as law, medicine, or science.

An **encyclopaedia** is a reference source that offers comprehensive articles on a wide range of topics. Encyclopaedias may be general, like *Encyclopaedia Britannica*, or subject-specific, such as *Encyclopaedia of Library and Information Science*.

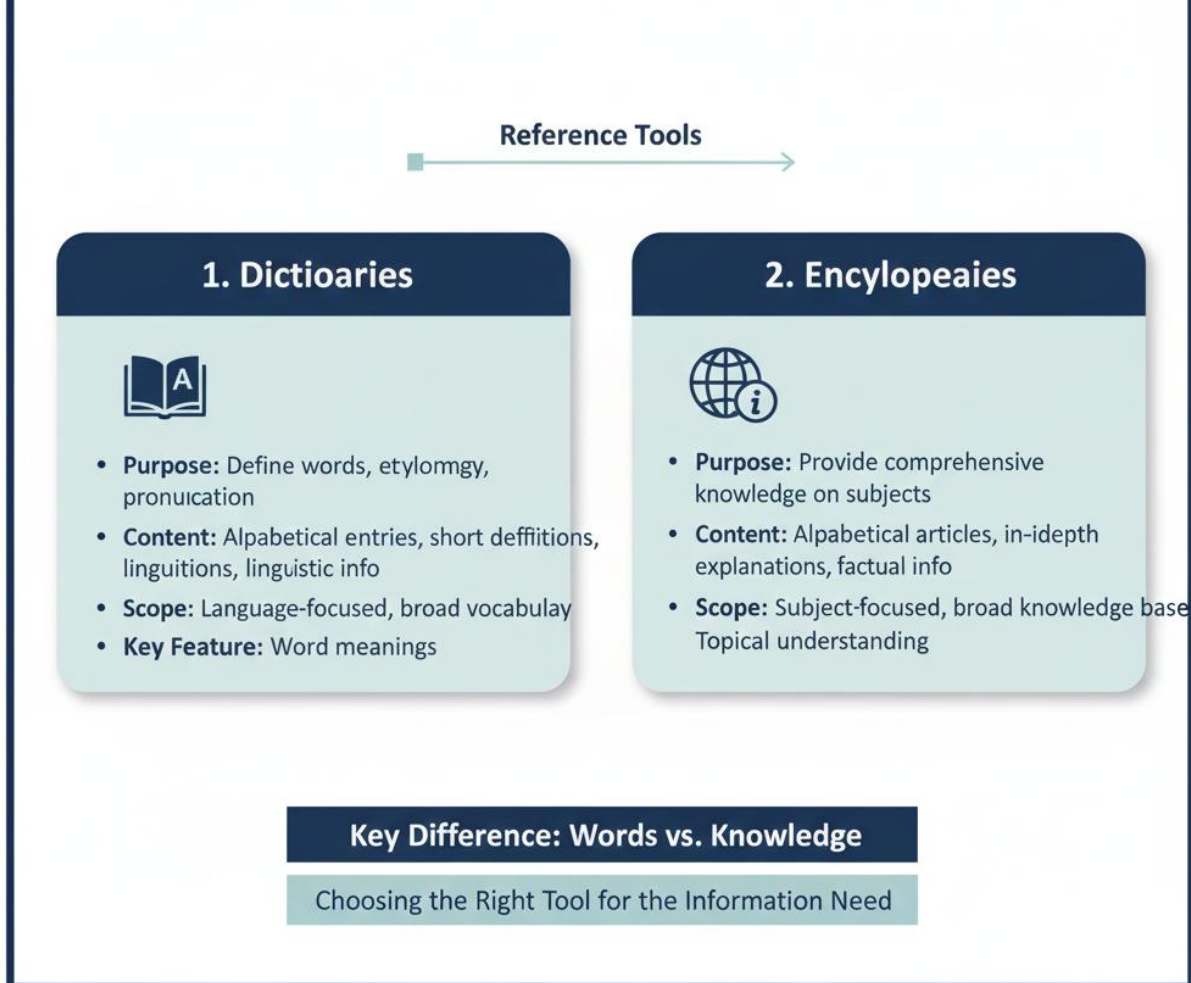
Fill in the blank:

- A dictionary provides definitions and spellings of words, while an encyclopaedia provides _____ articles on topics.



Figure 5.1 Comparison of dictionaries and encyclopaedias

A diagram comparing the purpose and content of dictionaries and encyclopaedias



5.1.2 Yearbooks, almanacs, and directories

A **yearbook** is a reference source published annually, containing statistical data, reports, and summaries of events from the previous year.

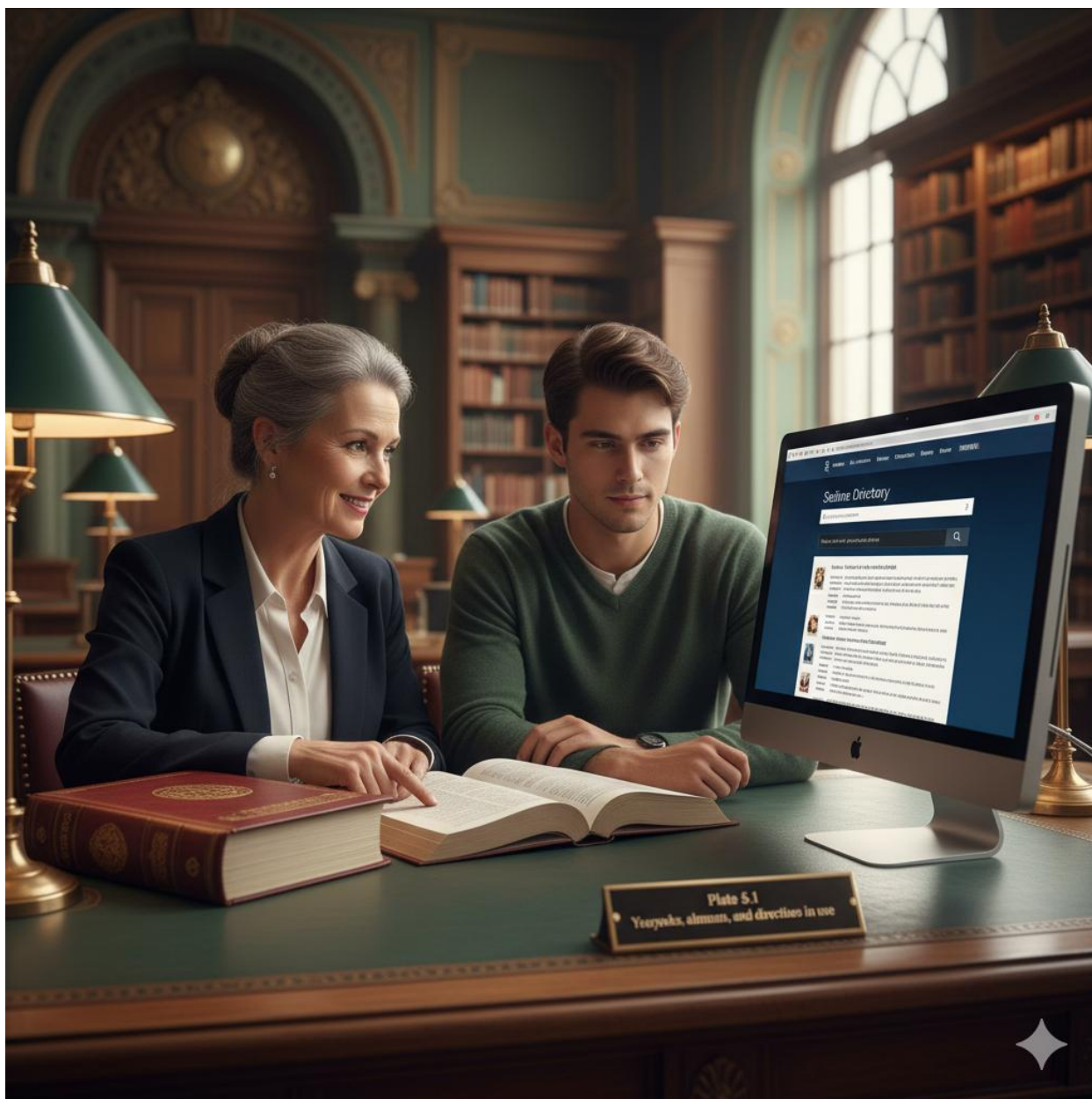
An **almanac** is a reference source that provides a wide variety of facts, figures, and tables, often including calendars, astronomical data, and general statistics.

A **directory** is a reference source that lists individuals, organisations, or institutions, usually arranged alphabetically or by category, along with contact details.

Fill in the blank:

- A directory is a reference source that lists individuals or organisations along with _____ details.





5.1.3 Bibliographies and indexes

A **bibliography** is a reference source that lists books, articles, or other documents on a particular subject or by a specific author. It serves as a guide to further reading and research.

An **index** is a reference source that provides a systematic arrangement of topics, names, or subjects, usually with page references or links to where the information can be found.

Fill in the blank:

- A bibliography lists books and articles, while an index provides _____ to locate information.



Box 5.1 Examples of bibliographies and indexes

A table listing types of bibliographies and indexes used in library research.

Type	Description/Purpose
1. Subject Bibliographies	• List resources on a specific topic (e.g., "Artificial Intelligence")
2. Author Bibliographies	• List works by about specific author
2. Author Bibliographies	• Track an author's scholarly output
3. List works by a about specific author	• List publications within a author country
4. National Bibliographies	• Identify articles in journals by subject, author, keyword
Journal Indexes & Databases	• Discover relevant research literature
5. Citation Indexes	• Track how articles be cited, others Measure influence & find related research

5.1.4 Electronic and online reference sources

Electronic reference sources are digital versions of traditional reference materials, such as online dictionaries, encyclopaedias, and databases. They provide faster access, search functionality, and often include multimedia elements.

Online reference sources extend beyond digitised print materials to include web-based platforms, portals, and subscription databases that offer real-time updates and interactive features.

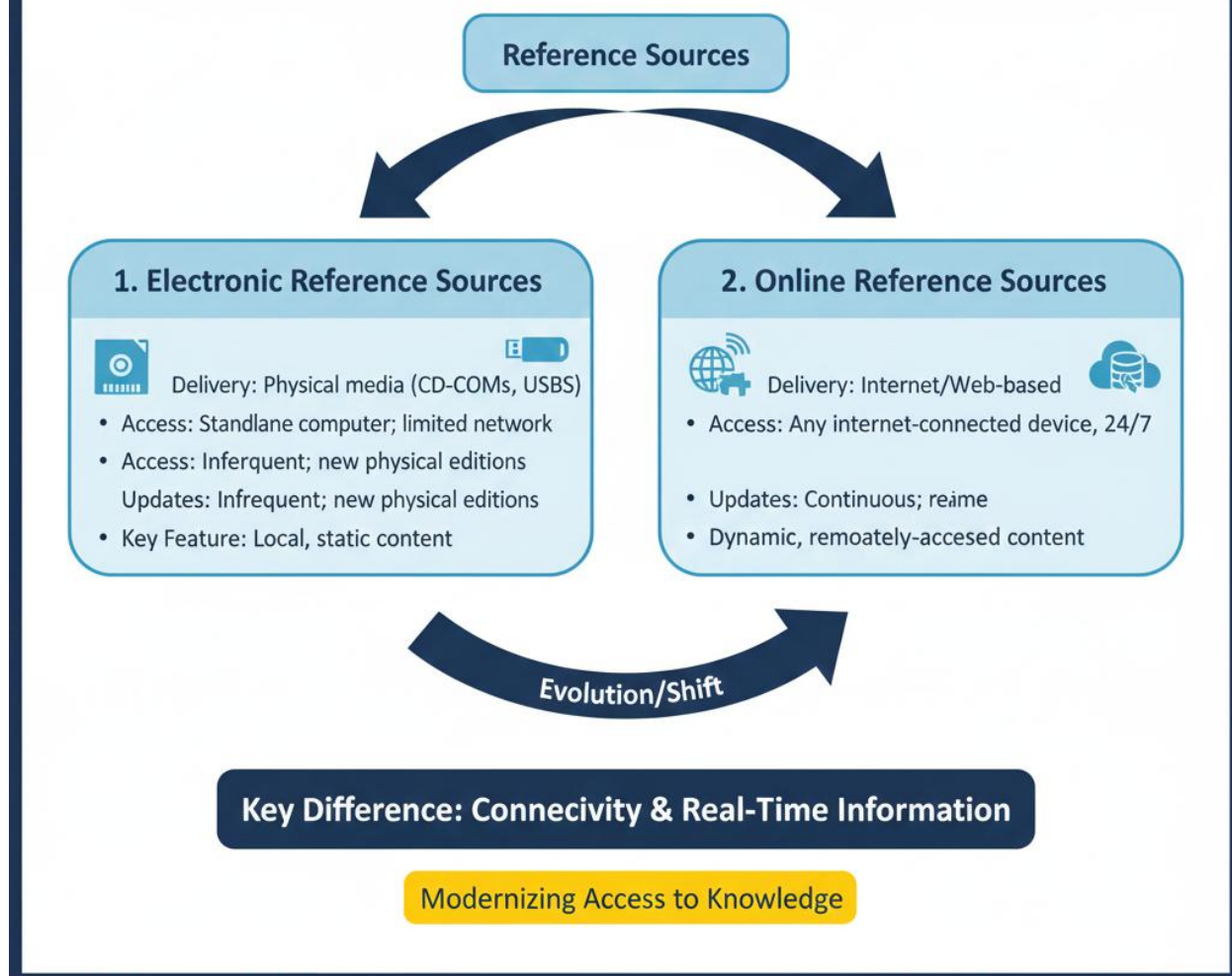
Fill in the blank:

- Electronic reference sources provide faster access and search functionality, while online sources offer _____ updates and interactive features.



Figure 5.2 Electronic vs online reference sources

A diagram highlighting the differences in access and updates between digital reference tools.



Pilot questions 5.1

1. What is the main difference between a dictionary and an encyclopaedia?
2. Give one example of information typically found in a yearbook.
3. What does a directory usually provide about organisations?
4. How does a bibliography differ from an index?
5. What advantage do online reference sources have over print sources?

Series Summary



This Series has focused on the importance of reference sources in delivering effective information services. Its purpose was to help you recognise the different types of sources, understand the qualities that make them reliable, and develop the ability to evaluate and apply them in both traditional and digital contexts. By exploring these dimensions, you have gained insight into how reference sources underpin the organisation and delivery of accurate, accessible, and user-centred services.

We began by examining the major types of reference sources, including dictionaries, encyclopaedias, yearbooks, directories, bibliographies, and electronic resources. Then we considered the characteristics of good sources, highlighting accuracy, authority, currency, and accessibility. Following that, we looked at methods of evaluating both print and electronic sources, comparing their strengths and limitations. Finally, we explored how sources are applied in practice, matching them to user needs and integrating them into digital services. In line with the Series Learning Outcomes, you should now be able to define the types of reference sources, explain their key characteristics, evaluate them using clear criteria, and apply them effectively in service delivery.

Glossary of Terms

Almanac A reference source that provides a wide variety of facts, figures, and tables, often including calendars, astronomical data, and general statistics.

Bibliography A list of books, articles, or other documents on a particular subject or by a specific author, used as a guide to further reading and research.

Dictionary A reference source that provides definitions, spellings, pronunciations, and sometimes usage examples of words.

Directory A reference source that lists individuals, organisations, or institutions, usually arranged alphabetically or by category, along with contact details.

Electronic reference sources Digital versions of traditional reference materials, such as online dictionaries, encyclopaedias, and databases, which provide faster access and search functionality.

Encyclopaedia A reference source that offers comprehensive articles on a wide range of topics, either general or subject-specific.

Index A systematic arrangement of topics, names, or subjects, usually with page references or links to where the information can be found.

Online reference sources Web-based platforms, portals, or subscription databases that provide real-time updates and interactive features beyond digitised print materials.

Reference sources Materials designed to provide quick, reliable, and authoritative information, often used to answer specific questions or guide further research.

Yearbook A reference source published annually, containing statistical data, reports, and summaries of events from the previous year.

Concept Check Questions [Series 5]

Objective Questions



1. Identify which type of reference source provides definitions and pronunciations of words. *(Linked to SLO 5.1)*
2. Select the characteristic that best describes a reliable reference source: accuracy, decoration, or assumption. *(Linked to SLO 5.2)*
3. State whether a yearbook is published monthly or annually. *(Linked to SLO 5.1)*
4. Match the following: Bibliography → list of documents; Index → systematic arrangement of topics. *(Linked to SLO 5.1)*

Short-Answer Questions

5. Explain one key difference between electronic and online reference sources. *(Linked to SLO 5.1)*
6. List two criteria used to evaluate print reference sources. *(Linked to SLO 5.3)*
7. Describe one advantage of online reference sources compared to print sources. *(Linked to SLO 5.4)*
8. Give one example of how a librarian might apply a reference source to meet a user's need. *(Linked to SLO 5.5)*

Long-Answer Questions

9. Analyse the characteristics of good reference sources and explain why they are important in delivering effective information services. *(Linked to SLO 5.2)*
10. Evaluate the strengths and limitations of electronic reference sources compared to print sources, providing examples. *(Linked to SLO 5.3 & SLO 5.4)*
11. Apply your knowledge of reference sources to design a strategy for assisting a user who needs up-to-date statistical data on global climate change. *(Linked to SLO 5.5)*

Answers to Concept Check Questions [Series 5]

Objective Questions

1. Dictionary.
2. Accuracy.
3. Annually.
4. Bibliography → list of documents; Index → systematic arrangement of topics.

Short-Answer Questions

5. Electronic sources are digitised versions of print materials, while online sources are web-based and updated in real time.



6. Accuracy and authority.
7. Online sources provide real-time updates and interactive features.
8. A librarian might use a directory to provide contact details of organisations requested by a user.

Long-Answer Questions

9. *Basic response:* Good reference sources must be accurate, authoritative, current, and accessible. These characteristics ensure that users receive reliable information that meets their needs. *Value-added response:* Beyond these qualities, good sources also support diverse user communities by being inclusive and well-organised. They enhance trust in library services and contribute to lifelong learning.
10. *Basic response:* Electronic sources are faster to access and easier to search, while print sources may be more stable and less dependent on technology. *Value-added response:* Electronic sources often include multimedia and hyperlinks, but they may require subscriptions or internet access. Print sources, though limited in currency, provide tangible reliability and are not affected by technical issues.
11. *Basic response:* The librarian should consult yearbooks, almanacs, and online databases to provide statistical data. *Value-added response:* A comprehensive strategy would involve using specialised climate databases, government portals, and international organisations' websites, ensuring the data is current, authoritative, and tailored to the user's research needs.

Answers to Pilot Questions [Series 5]

Part 5.1 Types of Reference Sources

1. Comprehensive.
2. Contact.
3. References.
4. Real-time.
5. A dictionary provides definitions, while an encyclopaedia provides comprehensive articles.
6. Statistical data.
7. Contact details.
8. References to locate information.
9. Real-time updates.

Part 5.2 Characteristics of Good Reference Sources

1. Accuracy.
2. Authority.



3. Currency.
4. Relevance.
5. Accessibility.

Part 5.3 Evaluation of Reference Sources

1. Print sources are evaluated for accuracy, authority, and organisation.
2. Electronic sources are evaluated for usability, currency, and reliability.
3. Print sources are stable but less current, while electronic sources are dynamic but may require subscriptions.
4. Strengths and limitations vary depending on format and user needs.
5. Comparative evaluation helps determine the most suitable source.

Part 5.4 Application of Reference Sources in Services

1. Sources are matched to user needs.
2. Case examples show practical application.
3. Sources are integrated into digital reference services.
4. Application ensures effective service delivery.
5. Digital integration enhances accessibility and efficiency.

References and Attributions [Series 5]

General References

- Bopp, R. E., & Smith, L. C. (2011). *Reference and information services: An introduction* (4th ed.). Santa Barbara, CA: Libraries Unlimited.
- Cassell, K. A., & Hiremath, U. (2018). *Reference and information services: An introduction* (5th ed.). Chicago: American Library Association.
- Katz, W. A. (1997). *Introduction to reference work* (Vols. 1–2). New York: McGraw-Hill.
- Ranganathan, S. R. (1961). *Reference service*. Bombay: Asia Publishing House.

Illustrations

Part 5.1 Types of Reference Sources

- *Figure 5.1 Comparison of dictionaries and encyclopaedias: AI-generated using prompt “Generate a diagram comparing dictionaries and encyclopaedias, showing definitions vs comprehensive articles.” Suggested search string: “dictionary encyclopaedia comparison library OER diagram.”*



- *Plate 5.1 Yearbooks, almanacs, and directories in use:* AI-generated using prompt “Generate an image of a librarian consulting a printed yearbook and an online directory.” Suggested search string: “yearbook almanac directory library OER image.”
- *Box 5.1 Examples of bibliographies and indexes:* AI-generated using prompt “Generate a text box listing examples of bibliographies and indexes, such as subject bibliographies and journal indexes.” Suggested search string: “bibliography index examples library OER.”
- *Figure 5.2 Electronic vs online reference sources:* AI-generated using prompt “Generate a diagram showing differences between electronic and online reference sources, highlighting access and updates.” Suggested search string: “electronic online reference sources comparison library OER diagram.”

Part 5.2 Characteristics of Good Reference Sources

- *Figure 5.3 Qualities of good reference sources:* AI-generated using prompt “Generate a diagram showing qualities of good reference sources such as accuracy, authority, currency, and accessibility.” Suggested search string: “qualities of good reference sources library OER diagram.”
- *Box 5.2 Criteria for evaluating reliability:* AI-generated using prompt “Generate a text box listing criteria for evaluating reliability of reference sources.” Suggested search string: “criteria evaluating reference sources library OER.”

Part 5.3 Evaluation of Reference Sources

- *Figure 5.4 Print vs electronic evaluation criteria:* AI-generated using prompt “Generate a diagram comparing evaluation criteria for print and electronic reference sources.” Suggested search string: “evaluation criteria print electronic reference sources OER diagram.”
- *Box 5.3 Strengths and limitations of sources:* AI-generated using prompt “Generate a text box listing strengths and limitations of print and electronic reference sources.” Suggested search string: “strengths limitations print electronic reference sources OER.”

Part 5.4 Application of Reference Sources in Services

- *Plate 5.2 Librarian applying reference sources:* AI-generated using prompt “Generate an image of a librarian matching reference sources to user needs.” Suggested search string: “application of reference sources library OER image.”
- *Figure 5.5 Integration of sources into digital services:* AI-generated using prompt “Generate a diagram showing integration of reference sources into digital reference services.” Suggested search string: “integration reference sources digital services library OER diagram.”



lanetonline.com

