



Shadowing Assignment:

Proper Planning Presents Poor Results

Observation Checklist

The purpose of reference services is to:

- Discover** what a person needs
- Strategize** how to find it
- Find** on-target information
- Deliver** it in a usable/timely form
- Check** if the client is satisfied
- Review** the process to repeat and improve performance
- Accomplish this **Frugally**.

Along the way, it is important to help those users develop comfort with the skills needed to become independent library users.

The Hedberg library is one of Wisconsin's leading public libraries in many respects. Because it has resources that many surrounding smaller communities cannot support, it functions as a reference library for Janesville, the surrounding communities, and the other libraries in the Arrowhead library system.

Working with their reference desk is an excellent way to observe how a public library's reference service works. The Hedberg staff is helpful and supportive to those that want to learn more about the profession.

Perhaps more importantly, it has the facilities to accomplish reference requests that would not be feasible for other libraries in the immediate vicinity to provide.

This observation will be structured to identify how the Hedberg reference staff (1) encourages inquirers, (2) Assess patron reuests, (3) apply reference strategies.

Observation Guide

Checklist for Observation Assignment

Library/Reference Desk Atmosphere/Structure

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|--|----|-------------------------|-----|
| 1. Library is clean and orderly. | No | Not Sure/Not Applicable | Yes |
| 2. Library has a comfortable atmosphere. | No | Not Sure/Not Applicable | Yes |
| 3. Reference desk is easy to find. | No | Not Sure/Not Applicable | Yes |
| 4. Reference desk is easily located. | No | Not Sure/Not Applicable | Yes |
| 5. Reference desk has comfortable/inviting atmosphere. | No | Not Sure/Not Applicable | Yes |
| 6. Reference desk has established policies and procedures | No | Not Sure/Not Applicable | Yes |
| 7. Reference desk has appropriate signage. | No | Not Sure/Not Applicable | Yes |
| 8. Reference desk has multiple service points. | No | Not Sure/Not Applicable | Yes |
| 9. Reference librarian body language encourages inquiries. | No | Not Sure/Not Applicable | Yes |
| 10. Reference librarian makes eye contact with patrons upon approach. | No | Not Sure/Not Applicable | Yes |
| 11. Reference librarian drops other tasks/activities and takes initiative to help users. | No | Not Sure/Not Applicable | Yes |
| 12. Reference librarian gives users their complete attention. | No | Not Sure/Not Applicable | Yes |

Reference Desk Users

- | | | | |
|--|----|------------------------|-----|
| 1. Variety of reference desk users. | No | No Sure/Not Applicable | Yes |
| 2. Variety of reference desk inquiries. | No | No Sure/Not Applicable | Yes |
| 3. Reference desk users represent community. | No | No Sure/Not Applicable | Yes |
| 4. School related requests are accepted. | No | No Sure/Not Applicable | Yes |

Reference Librarians

- | | | | |
|---|----|------------------------|-----|
| 1. Project competent, professional image. | No | No Sure/Not Applicable | Yes |
| 2. Accommodates user's special needs. | No | No Sure/Not Applicable | Yes |
| 3. Listen to patron requests fully. | No | No Sure/Not Applicable | Yes |
| 4. Asks meaningful, probing questions. | No | No Sure/Not Applicable | Yes |
| 5. Acknowledges implicit assumptions of reference inquiry. | No | No Sure/Not Applicable | Yes |
| 6. Confirms reference problem before researching/providing answer. | No | No Sure/Not Applicable | Yes |
| 7. Follows systematic approach to locating information. | No | No Sure/Not Applicable | Yes |
| 8. Checks variety of reference sources. | No | No Sure/Not Applicable | Yes |
| 9. Explains reference process as it applies to reference inquiry. | No | No Sure/Not Applicable | Yes |
| 10. Clearly provides reference answer(s). | No | No Sure/Not Applicable | Yes |
| 11. Asks probing questions to verify that information is useful. | No | No Sure/Not Applicable | Yes |
| 12. Allows users to follow up initial inquiry with additional clarifications, questions, and/or concerns. | No | No Sure/Not Applicable | Yes |
| 13. Brings patron request to polite, appropriate close. | No | No Sure/Not Applicable | Yes |
| 14. Promptly assists next patron. | No | No Sure/Not Applicable | Yes |

Phone Inquiries

- | | | | |
|--|----|------------------------|-----|
| 1. Answers phone by 4 th ring. | No | No Sure/Not Applicable | Yes |
| 2. Answers phone polite, professional manner. | No | No Sure/Not Applicable | Yes |
| 3. Demonstrates helpful attitude. | No | No Sure/Not Applicable | Yes |
| 4. Shows phone inquiries same courtesies as in-library requests (see previous section). | No | No Sure/Not Applicable | Yes |
| 5. Does not allow phone to interrupt reference assistance of in-library patrons. | No | No Sure/Not Applicable | Yes |
| 6. When busy, explains situation, takes appropriate information, and indicates when phone patron can expect a return call. | No | No Sure/Not Applicable | Yes |
| 7. Uses information gathered for return calls to prepare for the callback. | No | No Sure/Not Applicable | Yes |
| 8. Returns calls as soon as reasonably possible. | No | No Sure/Not Applicable | Yes |

Professional Decorum

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|---|----|------------------------|-----|
| 1. Reference Librarian circulates and maintains visibility. | No | No Sure/Not Applicable | Yes |
| 2. Allow colleagues to operate with their own professional style. | No | No Sure/Not Applicable | Yes |
| 3. Demonstrates courtesy to co-workers. | No | No Sure/Not Applicable | Yes |
| 4. Demonstrates diplomacy with co-workers. | No | No Sure/Not Applicable | Yes |
| 5. Assures patrons that are waiting that someone will be with them promptly. | No | No Sure/Not Applicable | Yes |
| 6. When appropriate, share inquiries. | No | No Sure/Not Applicable | Yes |
| 7. Referrals are made to other libraries/sources when answer is not available in-house. | No | No Sure/Not Applicable | Yes |
| 8. Referrals are fully explained to patron. | No | No Sure/Not Applicable | Yes |
| 9. Corrects colleagues without implying that they are wrong or incompetent. | No | No Sure/Not Applicable | Yes |

