



# The Data Reference Interview

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# Outline

- ▶ Why do a reference interview
- ▶ What is a reference interview
- ▶ When to do a reference interview
- ▶ Where to do a reference interview
- ▶ How to do a reference interview
- ▶ Tips from you

# Why?

- ▶ The importance of a good reference interview
- ▶ If we don't have the data in our collection, do we still have to do reference questions?
- ▶ Does the client really know what they want or do you have to help them figure that out?
- ▶ Essential to clarify the needs of the client

# What?

- ▶ The different levels of data reference
  - ▶ Dependant on your Data Services
- \*Level One: Data identification
  - The client knows what dataset they want
  - They need to know
    - How to get access to it
    - Any restrictions
    - Anything special about the dataset

Reference: Geraci, Humphrey and Jacobs (2012)

# Level 1 (cont'd)

- You need
  - Skills
    - How to search
    - How to conduct a reference interview
    - General knowledge of the popular studies and datasets

## Level 2

- Finding data by subject
  - New users are more likely to ask by subject
- You should know
  - Difference between microdata and aggregate data
  - A bit about the methods and practices of quantitative social science
  - Some social science data terminology
  - How to interpret data documentation

Reference: Geraci, Humphrey and Jacobs (2012)

# Level 3

- Data content recommendation
  - This comes with more experience on the job
  - Usually for upper-level students, professors or researchers
  - Usually not quick reference interviews
  - You should
    - Be able to interpret the data documentation
    - Be on several listservs
    - Check out training videos

Reference: Geraci, Humphrey and Jacobs (2012)

## Level 4

- Data file advisory services
  - Answer questions regarding the complexity of the actual data files themselves
  - Goes beyond just recommending a dataset
    - How to use online statistical services

Reference: Geraci, Humphrey and Jacobs (2012)



# Level 5

- Data extraction services
  - If a client only wants a subset
  - You may need to know
    - One of the major statistical analysis software packages

Reference: Geraci, Humphrey and Jacobs (2012)

## Level 6

- Data analysis advisory services
  - Goes beyond basic data reference
  - Maybe there is a statistical consultant that can help the client
  - Don't do it if you are not sure how to do it!

Reference: Geraci, Humphrey and Jacobs (2012)

# Level 7

- Comprehensive data analysis services
  - Does everything for the client
    - The analysis
    - The output is delivered in their format of choice
  - Comprehensive, complex and expensive
    - Have to define
      - Which services offered
      - To whom
      - Fees charged

Reference: Geraci, Humphrey and Jacobs (2012)

# Questions



<http://writenonfictionnow.com/7-questions-to-ask-before-starting-to-write-a-nonfiction-book-in-november>

# When?

- ▶ ??
- ▶ When do you not do one?

# Where?

→ ??

# How to do a reference interview

- Professional
- Active listening
- You are not only helping the client find an answer
  - You are also teaching them how to find information themselves
- They should understand what you are doing
- They should understand why you are doing it

## How ...?

- You want the client to be able to replicate the search on their own
  - Teach them how to do their own research
- Go through **all** the steps necessary in the search
  - From beginning to end
  - Slowly!
- If necessary, repeat your process using the **same** example



## How ...?

- Do not expect to give the client an answer immediately every time
  - The client will appreciate that you are being thorough
  - Get the client started, then get their contact information to forward more information later
    - Do not promise it within minutes!
    - Keep them informed of what you are doing if you are not able to find it immediately

## How ...?

- Determine the type of service needed
  - Ready reference
  - Consultation services
- Develop a small collection of data-reference tools
- Mention the importance of citation

## How ...?

- Tell them they can come back and see you anytime with more questions
  - Or send you an email
  - Or call you
- Tell them you would like to know how their assignment turns out
- Show an interest in them

# Other questions to ask

- Is it really data that they need
- Determine if they want microdata or aggregate data
  - e.g., Do they know SPSS/SAS/....
- Do they want to manipulate the data or do they just want a chart
- Is the data for background information or is it the main topic of the research
- ...

# Checklist - Data Reference Services

- Provide instruction and promotion for services and holdings.
- Identify local data holdings.
- Make appropriate referrals to other service providers or data sources.
- Provide assistance obtaining data.
- Provide assistance interpreting codebooks.
- Furnish proper citations for data.
- Facilitate understanding of the structure of data files.

Reference: Geraci, Humphrey and Jacobs (2012)

# Checklist ...

- Facilitate understanding of the contents of data files.
- Provide assistance with “self-service” computer programs, e.g., U.S. Census Extract; local or remote web extractors, etc.
- Subset data.
- Copy data or subset from one medium or machine to another.
- Move data from one software format to another.
- Provide computer-consulting services.
- Provide assistance with preparing data and documentation for deposit.

Reference: Geraci, Humphrey and Jacobs (2012)

# Checklist ...

- Provide assistance choosing appropriate software for analysis.
- Provide assistance using statistical software.
- Provide assistance writing statistical programs.
- Provide statistical consulting services.

Reference: Geraci, Humphrey and Jacobs (2012)

# Question for you?

- ▶ What is the difference doing a data reference interview for ...
  - ▶ an undergrad
  - ▶ a grad
  - ▶ a prof/researcher
  - ▶ someone outside your community



# Over to you!

- ▶ Do you have any tips to offer, share, ...

## In sum ...

- We have learned
  - The importance of a good reference interview
  - The different levels of data reference services
  - How to conduct a good reference interview

# Questions



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# References

- Geraci, D., Humphrey, C. & Jacobs, J. (2012) “Data Basics: an introductory text.”  
[3stages.org/class/2012/pdf/data\\_basics\\_2012.pdf](http://3stages.org/class/2012/pdf/data_basics_2012.pdf)
- Ross, C.S., Nilsen, K. & Radford, M.M. (2009). Conducting the reference interview, 2<sup>nd</sup> Edition. Neal-Schuman Publishers, Inc. New York.

# Thank you!

## Contact Information

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