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Learning from Reference Experience*

Mary Whisner**

While we all learn from experience, law librarians seeking to improve their reference skills can speed up the learning process by using some of the methods Ms. Whisner outlines.

¶1 You'd like to walk into tomorrow's reference shift a little better prepared to solve research puzzles than you were yesterday or two years ago. That is, you'd like to improve at your job. And you do, over time. But how do you? And are there ways to step up the progress a bit?

¶2 You can develop your knowledge and skills by participating in professional development activities, reading professional literature, and attending training sessions for online services. These all contribute to a librarian's growth. But I'd like to focus here on the ways that experience helps—and how to increase the amount it helps.

¶3 Reference gets easier as you gain experience. You notice that some questions recur, and you remember what worked the last time. You get a sense of approaches that often work for certain types of questions. You get to know sources—books in your collection, databases your library subscribes to, useful web sites. And you get better at reading the patrons—either because you get to know individuals or because you can apply your experience with five, fifty, or five hundred prior patrons to the next one you meet. Now how can you make your experience count for more?

Think About It

¶4 The first step in improving this process is becoming aware of it and therefore paying a little more attention as you go along. Here's an example: Recently an attorney asked for some help finding sample provisions about valuation to use in a buy-sell agreement. I know next to nothing about buy-sell agreements, but I do know they're used in corporate law. So my first thought was to take him to a set of form books that focused on that area. Without searching the catalog, and because I know the major sets in our reference area, I walked him to *Fletcher Corporation*

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** Reference Librarian, Marian Gould Gallagher Law Library, University of Washington School of Law, Seattle, Washington. I am grateful to Ellen Platt for suggesting the topic and for commenting on a draft of this essay.

Forms and got him started with the index. It wasn't clear that this was going to do the trick, so I left him there and went two aisles farther to look at *American Jurisprudence Legal Forms*, which turned out to have some promising entries:

STOCK AND STOCKHOLDERS

Purchase agreements [almost three pages in the index!]

—valuation §§74:1377, 74:1384.1, 74:1394-74:1399

I took him the index and volume 74, pointed out Rabkin and Johnson¹ nearby, and left him to his work.

¶5 When I returned to the reference office, I told the intern I was working with about the interaction and my thought process as I worked with the patron. On the one hand, my instinct to start with a specialized set often does work, but in this case the general set seemed better—at least based on my quick skimming. Talking about it made the incident more memorable to me (and, I hope, contributed to the intern's learning). It's an incremental gain in my knowledge of the two sets and might affect my research strategy in the future. Half an hour later, the attorney stopped by on his way out of the library, saying that the *Am. Jur.* forms were just what he needed. So the intern and I had a little reinforcement for our lesson.

¶6 Did my learning end there? No, because a few days later, I noticed a big loose-leaf volume on the shelf: *Structuring Buy-Sell Agreements: Analysis with Forms*.² Even though the patron had been satisfied with *Am. Jur. Legal Forms*, maybe this would have been even better. Perhaps my first instinct to take him to a specialized set was good, but perhaps I should have taken him to something *more* specialized. My expertise might have been a liability in this case, because I confidently walked him to *Fletcher* while, if I had stopped to check the catalog (and searched for “buy-sell” rather than the broader “corporat*”), I might have found this other source. Even without using the catalog, the patron or I could have seen the more specialized work if only we had looked around a little when we were standing in front of *Fletcher*, because the call numbers are quite close (KF1411 .F55 1972 for *Fletcher*; KF1466 .Z37 2000 for *Structuring Buy-Sell Agreements*).

¶7 This was a fairly simple reference interaction: “Where can I find sample provisions for valuing stock in a buy-sell agreement?” “Try this, or maybe this.” It would have been fine to finish it, forget it, and move on. But by thinking about it even a little, I have helped develop my knowledge of reference strategies and my knowledge of a couple of particular sources in our collection. I'm not likely to have the very same question again, at least not soon, but I am likely to have questions about finding forms. I have a little more experience now with the breadth and depth of *Am. Jur. Legal Forms*. I know that the index in *Fletcher* wasn't as easy for the patron and me to use. And I have been reminded to check the catalog for specialized works with forms.

1. JACOB RABKIN & MARK H. JOHNSON, CURRENT LEGAL FORMS, WITH TAX ANALYSIS (1948–).

2. HOWARD M. ZARITSKY, STRUCTURING BUY-SELL AGREEMENTS: ANALYSIS WITH FORMS (2d ed. 2000).

Talk or Write About It

¶8 None of us has a perfect memory, and all of us have a lot of information competing for space on our mental shelves. So how can I make it more likely that I will remember the lessons from a reference interaction like this? I find it helpful to talk about it. My sharing the experience with an intern wasn't just about helping the intern learn—it also helps me remember.

¶9 Recently I had a phone call from a public patron that reminded me of the importance of the reference interview. The caller wanted to find out about the legal rights to airspace over private property. My first thoughts were of airplane travel—the right to fly in particular areas. This sense was bolstered by the results of a quick Google search while I had the caller on hold: Wikipedia's entry for "airspace" discussed air traffic control and international law.³ But then I got to wondering: Why would this elderly woman call the local law library about that? So I got back on the line and asked the caller to tell me more about what she was interested in—was it aircraft overhead or something closer to the ground? It turned out to be much closer indeed. She was concerned about a cable that the cable company had strung over a corner of her property to reach a neighbor's house. Suddenly my mind shifted from flight paths and the FAA to something much more local. I eventually gave her the number of her county's building code enforcement office.

¶10 This was another reference interaction that I discussed with an intern. After I told him about how I fumbled through that reference interview, he wondered why people don't ask what they really want to know. We chatted about different reasons. It often has to do with the patron imagining how our information will be structured. In this case, for instance, the caller probably thought that "airspace" was the legally relevant term and that asking for the law concerning airspace rights was the most efficient way to have a law librarian tell her what to do about the cable that was bothering her. The intern and I were able to better understand patrons' approaches by discussing how we ask "reference" questions ourselves, for instance, when we're looking for something in a store. I know more about the products in grocery stores and how they're typically organized than I do about, say, hardware. So in a grocery store, I can ask for the cereal aisle and easily browse until I find the cereal I want. But in a home improvement store, I might not even know the name of what I need, let alone the aisle it would be in. I could well use the wrong term for whatever doodad I need, leading a clerk to send me to the wrong end of the store. Talking about the airspace question with the intern helped me think about this aspect of user behavior.

¶11 Writing helps, too. After devoting a couple of paragraphs here to the request for buy-sell agreement clauses, it will surely stick with me. But writing for *Law Library Journal* isn't the only writing that can help make a memory stick (nor would *LLJ*'s readers want to see notes of thousands of everyday reference interactions from librarians around the country).

3. Wikipedia, Airspace, <http://en.wikipedia.org/wiki/Airspace> (last visited Jan. 23, 2010). Yes, I sometimes plug a term into Google to see what pops up and, yes, I sometimes find Wikipedia helpful. I'm not saying these are my only tools, but they're definitely in the toolbox.

¶12 Writing can be entirely private, for instance in a journal (perhaps a work journal, separate from a more personal journal). Or the writing can be shared with others. In our reference department, we all can post to an internal wiki—a convenient place to record tips for oneself or for others. More publicly, when one of us is impressed by a new source, we might write a blog post about it.⁴ With either the wiki or the blog, the act of writing helps me remember, but the medium makes what I learned available to others (either within the department or on the web) and easy to retrieve by searching.

¶13 Our department's wiki contains a wide variety of information:⁵ A tip about using the tables in the *United States Code* (or the annotated codes). The library's password for the *National Law Journal* web site. An explanation of our *Congressional Record* holdings in paper and in microfiche and what's available online. The citation to an old article about *Hawkins v. McGee*.⁶ A list of sources for statistics about the legal profession. Instructions for using PACER. And on and on. As I said, the wiki contains a wide variety of information.

¶14 The wiki is the latest incarnation of our department's collective notes. Before I came—over twenty years ago—there were index cards in a file box. Partly because I hadn't created the index card system, I wasn't quite sure what was to be found there; or maybe it didn't have what I needed. In any event, I didn't use it much. I did use a Rolodex that had a few notes about sets and call numbers among the phone numbers. But there's a limit to what you can note on a Rolodex card, so in the early 1990s we went bigger and started working on a word-processed document in a binder. We called it Ref-Tips. Over the years it grew—from one document to over twenty-six (reftips-a.doc, reftips-b.doc, reftips-c-ca.doc, etc.) and from one binder to three. In 2006 we (or rather an intrepid intern⁷) moved the contents into a wiki. Now we are migrating to another wiki, this time on SharePoint.

¶15 Some tips stay pretty much the same over the years. Those *United States Code* tables help you get from a public law section number to a U.S.C. title and section just as well now as they did in 1991. Other entries need to be updated when sources or circumstances change. For instance, the old complaint that there is no easy way to get from a *Congressional Record* daily edition citation to the bound edition page number has now been alleviated, thanks to HeinOnline's Congressional

4. Our library has a group blog, written by librarians and interns. Gallagher Blogs, <http://gallagherlawlibrary.blogspot.com> (last visited Jan. 23, 2010).

5. "A wide variety of information" seems so humdrum. Drawing on my crossword-puzzle vocabulary, I could say it's an olio or perhaps a gallimaufry. But who else knows odd crossword puzzle words? Probably a lot of *Law Library Journal* readers, come to think of it, but I'll stick with the humdrum expression.

6. 146 A. 641 (N.H. 1929). This is the famous "Case of the Hairy Hand" included in most first-year contracts casebooks. Its fame was assured when class discussion of it was featured in the movie *The Paper Chase* (Thompson Films, 1973). For more about the parties—before and after the case—see Jorie Roberts, *Hawkins Case: A Hair-Raising Experience*, HARV. L. REC., Mar. 17, 1978, at 1; N.O. Stockmeyer, Jr., *Ten Reasons to Start Contracts with "Hairy Hand,"* LAW TEACHER, Spring 1995, at 3; see also *McGee v. U.S. Fid. & Guar.*, 53 F.2d 953, 956 (1st Cir. 1931) (holding that Dr. McGee's malpractice insurance did not cover the "special contract" he entered into to give Hawkins a "perfect hand, one hundred percent good").

7. Bret Masterson, M.L.I.S. 2007.

Record Daily to Bound Locator.⁸ Ref-Tips once had a table listing which states' administrative codes were on LexisNexis and which were on Westlaw, but, as the systems' coverage expanded, we dropped the table and simply said, "LexisNexis & Westlaw provide virtually all administrative codes & registers (dates of coverage vary). See the database directories for details." Other old entries can be deleted altogether (for instance, the awkward instructions for evening and weekend wheelchair access to the library in our old building).

¶16 So the wiki is one place where I—or another librarian or an intern—can record a reference discovery. When we think something would have wider interest, we can write a blog post. For example, a professor wanted to know how to convert a price in 1965 into today's dollars. I found a web site created by a couple of economic historians (Measuring Worth, www.measuringworth.com) that offers a calculator using several different techniques and an essay explaining the measures. After I answered the professor's query, I wrote up a quick post for the blog.⁹ To write the blog post, I tried a couple of different examples—I did not want to use the professor's question in a public post. That helped me understand what the site could do and, along with the act of writing, it helped me remember this great site. And when, as today, I want to go back to the site, I have the blog post to lead me there.¹⁰

Cover Memos

¶17 I have written before about using cover memos to present research results.¹¹ They serve several purposes for the patron and for the librarian and reference department. Of course, the benefits to patrons are important (that's why we write them!), but I'd like to focus now on what they do for us. When I detail where I looked, why I looked there, and what I found, I am fostering my own development as a reference librarian. The acts of organizing my results, structuring the memo, and explaining my choices ensure that I am thinking about the process. And the writing helps me remember.

¶18 We leverage our memos by sharing them. I learn not just from my own research experience, but also from that of my colleagues and the interns in our department. As I read, I see the research approaches that others used—the sources, the databases, the searches—and the results they obtained. I don't memorize all the details, but I gain ideas. It helps build my research repertoire.

8. The Locator currently covers Vols. 140–153 (Jan. 25, 1994—Nov. 23, 2003). HeinOnline, Congressional Record Daily to Bound Locator, <http://www.heinonline.org/HOL/CongRecLocator?collection=congres> (last visited Jan. 23, 2010) (access available to subscribers only).

9. How Can You Compare Dollars (or Pounds or Yen) Over Time?, posting of Mary Whisner to Gallagher Blogs, <http://gallagherlawlibrary.blogspot.com/2009/12/how-can-you-compare-dollars-or-pounds.html> (Dec. 6, 2009, 1:54 P.M.).

10. Recently our computer specialist, Dave Tawatao, updated the library web site's custom Google search so that one can search the web site and the blog at the same time. So typing **economic historian** in the library's site-search box leads to the blog post.

11. Mary Whisner, *Re: Memos*, 95 LAW LIBR. J. 601, 2003 LAW LIBR. J. 46.

¶19 We also increase the value of the memos by filing them. Down the road, when we're working on a similar question, we can go back to the earlier memo to give ourselves a head start on the new one. This sometimes presents an occasion for checking with one another. "Nancy, didn't you do something about kidney transplants a while back? Do you remember which professor that was for? Was your question similar to the question I have now?" Sometimes we remember only a bit—I think I looked up something like this for either Anderson or O'Neill (or maybe Cobb) and it was probably three or four years ago—so we have to flip through more than one file. But the flipping can be worth it when we find the earlier memo that lays out a good research path for us.

¶20 As with our shared notes evolving from a Rolodex to a wiki, our filing technology has improved access. We still have paper memos tucked into manila folders, but we also have many years of memos saved in SharePoint, so that they can be browsed¹² and searched easily.

When We Train Others, We Learn Too

¶21 You have no doubt noticed the presence of interns in many of my examples. I talk to interns about interesting reference interactions (mine and theirs) to help them learn. We maintain our wiki in part as a tool for the interns. We route memos prepared for faculty in part so we can expose the interns to our work and review the work they have done.

¶22 But each example I gave was primarily about my own learning, not the intern's. It turns out that having an environment that nurtures the newest members of the profession helps me develop my own skills. Even if we never had interns or less-experienced librarians, it would still be a good idea for us experienced librarians to think, talk, and write about what we do. It would still be useful to have a wiki and to organize and keep memos.

¶23 Reference work requires a complex mix of knowledge and skills. Sources change and new sources and tools are developed, so we need to keep learning. Even if we think we're pretty good at the reference interview and working with patrons, those skills bear continued polishing too.

¶24 A modest dose of reflection helps us learn from our experience. Talking or writing about what we've learned helps the lessons stick. And, since nobody can remember everything, it's wise to set up some systems to make it possible to retrieve the fruits of our past work—for example, an in-house wiki or a browsable or searchable collection of memos. Experience is a powerful teacher, and we can take advantage of the opportunities it offers.

12. We organize memos in folders by school year. We name each file with the name of the requester (faculty or staff member) and the topic—e.g., "Johnson Forensic DNA bibliography.doc." So it's possible to skim the list of files to find a remembered memo. One can also sort by date to find the most recent memos. After we began using SharePoint, Dave Tawatao added columns to the Faculty Memos document library to prompt us to enter our statistics when we save a memo. Now when we browse we can also see who worked on a memo and how much time was spent.