Good Cop, Better Cop:
Politely Interrogate Your Patron

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How is genealogical reference different from typical public library or academic library reference?
- The patron may not be a local resident.
- The patron may never have set foot in the library before.
- The patron may not have had any experience in conducting research, or it may have been decades since they last conducted research.
- The patron may lack experience in using computers or online databases.
- The patron may return again and again.

What should the patron see before communicating with you?
- The reference desk should be visible from the entrance to the collection, clearly marked, and welcoming.
- You should appear friendly and not busy with other duties.

What body language should you exhibit?
- You should make eye contact, smile, and appear relaxed.
- Your physical gestures should match your verbal behavior.
- Your facial expressions should be appropriate to the patron's mood and statements (helpful, sympathetic, delighted, interested).

What verbal behaviors should you engage in?
- You should offer a welcoming and sincere greeting.
- You should listen and take notes (including the patron's name, if possible).
- You should paraphrase what the patron has said, in order to verify understanding and to come to an agreement as to what the patron needs.
- You should ask questions in order to clarify information and to avoid making hasty assumptions.
- You should resist the urge to make a hasty diagnosis of a solution to the patron's question.
- You should be careful not to indicate any disapproval of the patron's objective.

How can you put yourself into the mindset of a brand-new genealogy patron?
- The patron doesn't know the genealogical research process, or how to start.
- The patron may not have a specific question (at first).
- The patron doesn't understand what genealogical information exists and what does not.
- The patron doesn't know what physical materials the library has, what the library makes available to them online (within the library or at home), what is available for free online, and what they may have to pay for.
- The patron doesn't know how the library collection is organized.
- The patron is unsure as to what you can (or will) do for them, and what they will need to do on their own.
- The patron may not understand the amount of time and expense that may go into genealogical research.

What goes into the "nice" interrogation?
- As you talk with the patron, try to get a sense of their experience and skill levels both with using computers and with engaging in genealogical research.
- Help the patron turn a very broad and vague need ("I want to know about my family history") to more and more specific questions ("I want to know about my paternal grandfather").
- Find out what the patron already knows (or believes that they know), and how they know it (family story? previous research by someone else? previous research that they have done themselves?).
- For the specific question, ask them where they have already looked, keeping in mind that even if they were unsuccessful, it doesn't mean that the information isn't there.
- Attempt to ascertain if there is a specific objective (joining a lineage society? planning for a family reunion?), but always be careful not to appear nosey or judgmental about the objective. Explain that knowing what their research goal is may help you to recommend the right resources to them.
- The more notes you take, the more you will demonstrate interest in their question, and the less you will need to ask them to repeat information that they have already told you.
- If they have brought any documents with them, ask if you can look at those yourself.

What should you make notes about?
- The patron's name and contact information (for follow-ups)
- The patron's research goal and any associated deadlines
- Specific questions needing answers
- What the patron already knows
- Where the patron has already looked
- What library resources (physical and online) might address the question
- Where referrals can be made

How do you make the genealogy patron's first visit a success?
- Genealogical research is a benevolent addiction.
- The initial experience can either lead to a lifelong hobby (despite occasional frustrations), or be an initial discouragement that will cause the patron to abandon genealogical research forever or at least for a very long time.
- Look for ways to make that first experience successful.
- Find information that the patron wanted but didn't already have.
- Find the patron's ancestor is an online database, even if it's only a single record.

How can you make good referrals?
- Be aware of what is available at nearby repositories, or at more distant state or national repositories.
- Be aware of what is available online (both free and subscription services).
- Referrals should be offered in such a way that the patron feels that you are truly being helpful and not simply trying to pass the patron off on another repository.
- When making a referral, you should verify all contact information and hours of operation using the repository's website.
- Encourage the patron to contact you again in any case where the referral did not meet the patron's expectation.

How should you conclude the interview?
- Let the patron know you are available and accessible for any further questions.
- Accompany the patron to the relevant collection resource (stacks, microfilm, computers) and help them to get started.
- Ask follow-up questions:
  - "Did that give you what you needed?"
  - "Are there other questions you have that I can help you with?"
  - "What else can I do for you?"
  - "Is that all you needed today?"
- If the patron remains in the library, keep an eye out for them in case they appear to be having any problems.

What is different about telephone reference?
- There is no body language (so tone of voice becomes more important).
- The patron may be distracted by their own environment.
- Get a name and number up front in case you need to call back.
- If you need to refer the patron to another repository, consider making the call on their behalf so that the other repository calls the patron (minimizing the patron's feeling that they are being passed off).

What is different about chat or email reference?
- Indicate the days and hours when live chat is staffed (not just an "available" or "unavailable" indicator).
- Have the library's email form suggest what to include in the question in order to minimize the need for follow-up questions (but don't be intimidating).
- Provide an expectation of turnaround time for email responses (but always do better than what is expected).
- If you need to refer the patron to another repository, reply to the patron with a CC to the other repository's email address, explaining why you are making the referral.

Final points to keep in mind
- You can't answer every question, but you can usually make a very good attempt.
- You may have to give patrons disappointing information, such as that the records they need do not exist or are not available online.
- You may be able to research the question and get back to the patron at a later time by phone or email.
- It is not a failure on your part when you refer the patron to a more helpful collection or service.
- You will need to assess the patron's skill level and attitude in order to determine how instructive you want to be.