

Inclusive Reference

Creating Guiding Principles and Best Practices That Inform Our Everyday Practice as Reference Librarians

In 2021, the Research Services Team at the Gutman Library at the Harvard Graduate School of Education (HGSE) was preparing to onboard two new colleagues. As we developed checklists and other orientation documentation to help our new librarians acclimate to their roles, we talked at length about our research consultation practice. One-on-one research appointments are heavily used at HGSE, and the Research Services Team grappled both with how to codify what we were already doing and how to continue refining our practice to ensure every user feels welcomed and supported. We conducted preliminary research to see what others in the field had written about conducting inclusive research appointments and came up short. Although there is extensive literature on inclusive teaching in librarianship, there currently exists very little research on developing a set of best practices for inclusive research consultations.

Fortunately for us, one of our incoming colleagues was Jamillah Gabriel, who was hired for the role of critical pedagogy research librarian. The Research Services Team invited Gabriel to design and lead a professional development series specifically for Gutman Library staff focused on the practice of inclusive reference, leveraging her existing expertise in this work and the team's eagerness to deepen our practice around inclusivity. This led to a multisequence process of deep learning in inclusive pedagogy and other closely related topics as further discussed below, resulting in an instructive document of guiding principles and best practices for inclusive reference.

Developing Inclusive Reference

In preparation for initial discussions on inclusive reference, the team first embarked upon a comprehensive and intensive schedule of readings encompassing various topics such as inclusive pedagogy, Black feminist thought, cultural humility, trauma-informed pedagogy, culturally sustaining pedagogy, and Universal Design for Learning. The overarching goal was to develop a body of knowledge on topics that would be directly applied to the development and understanding of what inclusive reference could and should be. This meant acquiring a critical perspective that would take into account multiple ways of knowing and thinking and allow adequate time for thorough reading and reflection, thereby practicing inclusivity even in the knowledge-gathering process leading up to our discussions.

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We committed to meeting monthly to discuss the readings as a team with the aim of identifying key components of these various theories and pedagogies that would serve as the foundation of our work. We determined that the work would culminate in an inclusive reference document that would both provide guiding principles and frame a set of best practices for information workers wanting to incorporate inclusivity in mindset and in practice. After completing the readings, our group discussions shifted into brainstorming sessions where we identified key components of those readings that we felt embodied the application of inclusivity to reference and research, and we began to develop the guiding principles that would provide the rationale for why such a practice was necessary in one-on-one consultations and interactions. We modeled our process on the Robert Perret article¹ similarly discussing the implementation of virtual reference, which prompted us to ask the following questions of ourselves:

- What is inclusive reference?
- Why are we doing inclusive reference?
- Who are we serving?
- How are we creating an inclusive practice?
- Where is inclusive reference taking place?
- How do we conduct inclusive reference?

We then began to think through the kinds of practices that would characterize inclusive reference, which meant considering things such as inclusivity training, accountability measures for our reference interactions, challenges in practicing inclusive reference, core reference skills that we should all possess, and chat techniques to employ toward creating an inclusive environment for all involved. The ideas emerging from these discussions ultimately led to the practices we deemed vital to foregrounding inclusivity in our research interactions. The end result of this focused and very dedicated work is the “Guiding Principles and Best Practices for Inclusive Reference” document and accompanying LibGuide, which we have begun to disseminate to the Harvard, New England, and greater LIS communities.²

Guiding Principles and Best Practices

In our work as the library’s Research Services Team, establishing guiding principles and best practices for inclusive reference has become central to how we serve our diverse campus community. Within research services, we recognize that every user—whether a student, faculty member, staff member, alumnus, or visitor—brings distinct backgrounds, identities, and research needs to our interactions. Grounded in inclusive pedagogy, our approach moves beyond broad ideals to practical steps that shape each reference encounter, whether in person, online, or at the point of need. By formalizing our commitment to inclusivity through these principles and practices, we aim to ensure that every research support interaction is meaningful, equitable, and welcoming, reinforcing the library as a space where all voices are acknowledged and valued.

Why Is Inclusive Reference Important?

Library users today are as diverse as their questions. We meet graduate and international students, faculty, alumni, and visitors from all walks of life, and each brings unique identities and experiences into our space. Traditional approaches to reference services, while

helpful, can miss critical opportunities to dismantle structural inequities or to recognize trauma, cultural context, and the full spectrum of knowledge traditions. Without intentional change, libraries can unintentionally reproduce the very exclusions we seek to challenge.³

A Shift in Mindset

Rather than relying solely on existing standards, we were inspired by the framework of inclusive pedagogy, a philosophy that “responds to learner diversity in ways that avoid the marginalization of some learners in the community of the classroom.”⁴ As our campus community grows more diverse and user needs continue to evolve, we recognize now is the time to adopt this approach in our library reference work. By doing so, we aim to meet users where they are and ensure our help reaches everyone, not just those best served by traditional structures.

Building Our Principles

We developed our principles through structured readings, discussions, and reflection on practice within our team. At the heart of this process is the commitment to cultural humility, a recognition that it is impossible to know everything about other people’s identities and experiences but essential to remain open, curious, and self-reflective.⁵ Coreen Getgen’s article on cultural humility recognizes that growth is ongoing, and though no training can prepare professionals for every situation, combining education with self-reflection fosters continuous improvement.⁶ Our inclusive reference principles also center on trauma-informed care, where we acknowledge that both patrons and staff may carry experiences of trauma, and we strive not only to recognize these but also to actively prevent retraumatization in our interactions.⁷

Putting Principles into Practice

Best practices emerged naturally from these shared values: (a) We encourage patrons to share and direct the flow of reference interactions, building trust and agency,⁸ and (b) we reflect regularly on our own assumptions and biases, welcome mistakes as opportunities for growth, and consciously seek out and recommend scholarship from marginalized voices. Our approach is also about striving for warmth, accessibility, and empathy, whether in person, over chat, or via email. While our work often takes place in environments that prioritize quick responses and high volume, intentionally slowing down to focus on the quality of our interactions ensures that all users feel seen, heard, and supported. The nature of our work often values speedy responses and number of interactions over quality, so in contrast, we thought it was important to take the time to build rapport and value each user’s perspective to help create an environment of psychological safety and intellectual growth. As Patricia Collins highlights in her work on Black feminist thought, “personal expressiveness, emotions, and empathy are central to the knowledge validation process.”⁹

Implications and Conclusion

Over the course of this article, we have discussed some of the possible implications for incorporating inclusive reference into our work as research librarians. One of the primary implications that has emerged is in the application of inclusive reference to our research

consultations. We now actively incorporate inclusive learning within our research consultations, which has naturally led us to the next stage of this process and prompted the question: How do we assess the implementation and success of inclusive reference? Consider these two perspectives for assessment: (a) the librarian's account of what took place during the encounter and (b) the student's perception of how they felt during the consultation. We believe that students likely perceive that staff sets the tone for libraries, and as such, librarians and library staff should look to find and implement ways to benefit a student's interaction with staff. With this, we are currently working on an assessment tool that will allow us to glean anecdotal and/or quantitative information from students and subsequently work toward actionable changes. Such feedback would have the dual effect of enabling us to maintain accountability and strengthen our positionality, both individually and as a group.

We have also asked ourselves how our colleagues outside of research services (but within Gutman Library) would implement this practice. Although we are not all research librarians, we all regularly conduct research consultations. Inclusive reference is something we continue to work toward as we must foster a mindset of continuous learning by seeking individual professional development opportunities, practicing self-reflection, and engaging in intentional conversations with colleagues. As librarians, we have the opportunity to lead the effort to dismantle stereotypical narratives through the provision of accurate information, thus supporting both cultural pride and culturally humble practices.¹⁰

It is our hope that what we have shared will guide others in their inclusive reference journey. These principles and practices are not static. They are a living part of our library's culture. By embedding inclusive reference into everything from staff training to daily interactions, we not only support users better but also foster our own learning as librarians. Above all, our goal is simple: to ensure every question, and every person, finds a place where they belong. ♪

Notes

1. Robert Perret, "Developing Policies and Best Practices for Virtual Reference," *PNLA Quarterly* 76, no. 1 (2011): 82–85.

2. Gutman Library Research Services Team, "Inclusive Reference," *Harvard Gutman School of Education* (2025), <https://guides.library.harvard.edu/inclusivereference>.

3. David A. Hurley, Sarah R. Kostecky, and Lori Townsend, "Cultural Humility in Libraries," *Reference Services Review* 47, no. 4 (2019): 544–55, <https://doi.org/10.1108/RSR-06-2019-0042>.

4. Jennifer Spratt and Lani Florian, "Inclusive Pedagogy: From Learning to Action. Supporting Each Individual in the Context of 'Everybody,'" *Teaching and Teacher Education* 49 (2015): 89–96, <https://doi.org/10.1016/j.tate.2015.03.006>.

5. Sarah Kostecky, Lori Townsend, and David Hurley, "Is Cultural Humility Too Easy?" *College and Research Libraries* 84, no. 5 (2023): 638–44, <https://doi.org/10.5860/crl.84.5.638>.

6. Coreen Getgen, "Cultural Humility in the LIS Profession," *The Journal of Academic Librarianship* 48, no. 4 (2022), <https://doi.org/10.1016/j.acalib.2022.102538>.

7. Monte-Angel Richardson, Stephanie Rosen, Marna M. Clowney-Robinson, and Danica San Juan, “Bringing Trauma-Informed Practices to Underserved Patrons at University Libraries,” in *Underserved Patrons in University Libraries* (Bloomsbury, 2021), 91–108.
8. Meredith Knoff and Maya Hobscheid, “Enacting Service Policies through Pedagogy to Create a More Inclusive Student Experience,” *Public Services Quarterly* 17, no. 1 (2021): 12–25, <https://doi.org/10.1080/15228959.2020.1856017>.
9. Patricia Hill Collins, *Black Feminist Thought: Knowledge, Consciousness, and the Politics of Empowerment* (Routledge, 2000).
10. Hurley, Kostecky, and Townsend, “Cultural Humility in Libraries,” 545.