Reference Services Assessment Review 2011: Future Perfect Reference

Charge: As a subcommittee of the Library Assessment Committee, this group is charged to guide reference assessment activities in the Library; to identify evaluation needs based on Library and Unit goals; to conduct assessment activities; and to report results and make recommendations.

“Assessment activities include the measurement and evaluation of reference work, resources, and services.”

“A variety of measures such as quality or success analysis, unobtrusive, obtrusive or mixed observation methods, and cost and benefit analysis provide invaluable information about staff performance, skill, knowledge, and accuracy, as well as overall program effectiveness.”

http://www.ala.org/ala/mgrps/divs/rusa/sections/rss/rsssection/rsscomm/evaluationofref/measrefguide.cfm

What questions are we trying to answer?
What performance or quality standards will you use to measure your success?

Current and Past Strategies for Reference Assessment

- LibQual+ (a biannual survey of library quality. See: [http://www.libqual.org/home](http://www.libqual.org/home)
- One Time Surveys
  - Poll of student spaces
- Focus Groups
- Informal and formal feedback, including the comments forms on the first floor
- Informative for future assessment: study of chat and SMS reference
- Environmental Scan
- Statistics
  - Reference Effort Assessment Data (READ) scale statistics
  - Reference desk statistics
  - Email, Chat, SMS statistics
  - Library snapshot day and week
Possible Future Assessment

- Observational methods
  - Unobtrusive observation
  - Obtrusive observation (peer evaluation)
    - useful in person
    - post facto chat (transcript analysis)
    - post facto SMS (transcript analysis)
    - if anonymity is preferred, librarian credentials can be removed before peer evaluation -- “Transcript analysis has become a standard method for evaluating virtual reference services.” - Reference Reborn p. 164
- One time surveys
  - Wisconsin Ohio Reference Evaluation Program (WOREP) or something like it - an in person quality assessment
  - QuestionPoint chat reference surveys
  - SMS surveys? How can we do this?
- READ Scale (separated because it can be viewed as an assessment tool, not merely statistical data to inform assessment)
- Focus groups
- LIBQual+
- Statistics
  - Reference desk statistics
  - Email, Chat, SMS statistics

Areas to Review or Consider

Patterns of use

What kinds of reference services do the users want?

Are there patterns of use in terms of how users are accessing reference staff? Reference materials and collections? Reference areas?
This can be assessed with the use of a ranking question or observational studies.

**Reference Transactions – Volume, Cost, Benefits, and Quality**

Simple tallies of reference transactions, collected daily or sampled, can be interpreted to describe patterns of use and demand for reference services. Managers commonly use transaction statistics to determine appropriate service hours and staffing. Often, volume statistics are reported to consortia to compare local patterns of use and demand to peer libraries and to calculate national norms.

Analysis of reference transactions by type, location, method received, sources used, and subject can be used for collection development, staff training/continuing education, and budget allocation. Analysis of accuracy, behavioral performance, interpersonal dynamics, and patron satisfaction during the reference interview can be used for staff training and continuing education.

**Resources**

- **Encountering Virtual Users: A Qualitative Investigation of Interpersonal Communication in Chat Reference** (Radford, Marie L., 2006). *Journal of the American Society for Information Science and Technology*
- **Frustration Factor and Nuisance Factor** (Kantor, 1980). *The Reference Assessment Manual*, 1995. Use to estimate reference service accessibility (Frustration Factor) and patron time spent waiting (Nuisance Factor).
- **Patron Satisfaction Survey PaSS™** - (Schall, Richardson, 2002). 7-point Likert scale survey of patron satisfaction with an online reference transaction (librarian’s comprehension of question, friendliness, helpfulness, promptness, satisfaction with answer)

- **Unobtrusive Data Analysis of Digital Reference Questions and Service at the Internet Public Library: An Exploratory Study** (Carter, David S., Janes, Joseph, 2002). *Library Trends*, 49 (2): 251-265. Study conducted to establish a methodology for the unobtrusive analysis of a digital reference service. Logs of over 3,000 questions were analyzed on the basis of questions asked (subject area,
means of submission, self-selected demographic information), how those questions were handled (professional determination of subject and question nature, questions sent back to users for clarification), and answered (including time to answer) or rejected. Answers that received unsolicited thanks.

- **Wisconsin-Ohio Reference Evaluation Program (WOREP)** – (Bunge, Murfin, 1983). WOREP is designed to assess the outcome of the reference transaction and to identify factors related to success or lack of success. WOREP provides diagnostic information based on input factors: collections, staff skill and knowledge, subject strengths, types of staff, types of questions; and process factors: communication effectiveness, time spent, technical problems, assistance by directing or searching with, and instruction. The WOREP report also provides both a profile of the users of a specific reference service and a comparison of the library with other libraries who have used WOREP.

**Quality Analysis - Patron Needs and Satisfaction**

The perceptions and needs of patrons are important measures of the quality and impact of reference services. Surveys, combined with other measures such as numerical counts, observation, and focus groups, are commonly used to conduct comprehensive assessments of service performance and patron needs.

**Resources**

- **LibQual+™** - (Association of Research Libraries, 2001). Use to measure user perceptions and expectations of library service quality. LibQUAL+™ surveys are used to solicit, track, understand, and act upon users’ opinions of library service quality. [http://www.libqual.org/](http://www.libqual.org/)

**Measuring and Assessing Reference Resources – Use, Usability, and Collection Assessment**

As print and electronic reference collections grow in size and format, they must be continually assessed to determine their relevance, utility, and appropriateness to patrons. Use and usability tests examine how often and how well visitors navigate, understand, and use
web sites, electronic subscription databases, free Internet resources, library subject web pages, and other web-based tools such as bibliographies, research guides, and tutorials.

An example of this could be the “have you heard of...” study, which would include a list of services. Other examples include....

- Are things working within the library with regard to the role of reference?
- Are people obtaining the right help in the right place?
- What percent of those who are helped in various locations succeed in finding what they want?
- Is available space adequate to necessary functions?
- Does the reference desk environment facilitate good communication?
- What components of the physical environment need improvement, either marginally or substantially?

- **Formal Usability Testing** – Observe as patrons use a site to perform given tasks or achieve a set of defined goals.
- **Inquiry** – Use interviews, surveys, and focus groups to gather information about patron preferences and use of a particular site.
- **Inspection** – Use to evaluate a site against a checklist of heuristics and design principles or simulations of typical user tasks.

**Analysis of Previous Assessment**

Included on the following pages is a review of specific assessment surveys that took place within the last two years. The surveys were chosen by the Reference Assessment Team based on their relevance to reference work and whether or not they contained comments. The goal was to analyze the comments for gaps or negative comments, to determine if there are any areas of improvement in our reference services. Our methodology consisted of dividing the surveys among team members; each team member reviewed the survey comments to determine if a comment expressly concerned reference services. For the SMS reference assessment, comments regarding perception of the service in general were ignored (i.e. “everyone text messages now”) and only comments directly involving the service were included (i.e. “the librarian who sent a text message was very helpful and the response was fast”). Each librarian coded these comments based on a rubric that we had decided on in advance. The results were overwhelmingly positive, and the group was able to identify a few areas for potential improvement.
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<tr>
<th>Comment Source</th>
<th>Comment or paraphrase</th>
<th>Positive Comment</th>
<th>Negative Comment</th>
<th>Mixed/Neutral Comment</th>
<th>Help Service General</th>
<th>Librarians</th>
<th>Staff General</th>
<th>Reference Desk</th>
<th>Reference Chat</th>
<th>Reference Text</th>
<th>Reference Email</th>
<th>Reference Collection</th>
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<tbody>
<tr>
<td>LibQual</td>
<td>I think BSU library overall is a good library especially the help. I wish to qualify that the reference librarians who work with/ have worked with my department and college are outstanding.</td>
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<td>LibQual</td>
<td>The reference desk is always great...If the service ratings on this survey were based just on the librarians, they would be a lot higher. The librarians rock.</td>
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<td>LibQual</td>
<td>The staff are fantastic.</td>
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<td>LibQual</td>
<td>I love the workers in the library: friendly, informed, helpful, all around excellent group.</td>
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<td>LibQual</td>
<td>when I need help in the library, the folks at the help desk are patient, friendly, and always take care of my questions.</td>
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<td>LibQual</td>
<td>The Library staff has always been quite helpful to me and my classes.</td>
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<td>LibQual</td>
<td>My experience with the library and the library employees has always been great and beyond my expectations. The library, in general, and the reference librarians, specifically, are a fantastic resource for faculty and students. I couldn’t be happier with the service, attitude, and helpfulness of our library faculty.</td>
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<td>LibQual</td>
<td>[My liaison] is a wonderful resource and greatly valued. Other library staff leave me a bit unimpressed. Often seems the right hand does not know what the left hand is doing and often receive &quot;I don't know responses...you need to talk to XXX&quot; who is never available, responds to phone calls or messages etc.</td>
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<td>LibQual</td>
<td>The customer service is good but I would like to see it consistently at a higher level.</td>
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<td>LibQual</td>
<td>My experience is that if you ask for help at the library you get EXCELLENT help.</td>
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<td>LibQual</td>
<td>I have had fabulous research assistance from the library. I particularly commend [my liaison]. I find the staff/faculty to be extremely helpful and supportive.</td>
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<td>LibQual</td>
<td>overall I perceive the student workers and professional staff to be exemplary.</td>
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<td>LibQual</td>
<td>I have consistently found all library staff courteous and helpful.</td>
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<td>LibQual</td>
<td>[My liaison] is an absolute gem.</td>
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<td>LibQual</td>
<td>I have always received the help I need when working with the library staff. I have received incorrect information from an employee at times. But, on the average, most library employees are helpful.</td>
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<td>LibQual</td>
<td>I think staffing at the desks has become more erratic and less user-friendly.</td>
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Everyone was so so helpful. I understand the busy atmosphere in that setting and was thrilled to have such courteous and quick information for my requests.

Some reference librarians are rude, unfriendly, and unhelpful. I experienced this attitude both as a student and as a staff member at various times over the years.

You do a wonderful job of providing customer service--truly great job.

I had an employee who couldn't help me find a certain Journal I was looking for. All they told me was upstairs somewhere, which then I could not find someone else to ask.

the staff are not very helpful. Usually because there are too few staff for the number of students/staff looking for help. Also, not all of the staff are very knowledgeable about the systems/processes.

I've been satisfied with the help I received....Service rates high.

I asked for help and explained I was having trouble understanding the library system and was shown the area where the books would/should be and nothing more. I have had to ask other students to find out how to get copies or print of things. I don't like that because they treat you like you are an idiot!!!! I shouldn't have to ask them anyway.

I try not to use the BSU Library because all the employees are rude and most of them can't help me find anything I need.

I love coming to the library to use the resources, get advice from the staff and I love that the printers allow you to print double-sided!! :)

The only negative experience I have had was asking for help from a woman running the "Info/Help Desk" on the main floor. All I wanted to know was if there was a copy machine for student use and she rudely told me that she couldn't help me if I couldn't figure out how to use the self serve machine by myself.

I have had great experiences with the library staff, they are helpful and I feel that they greatly influenced my work by allowing me to find the materials that I needed to write solid papers filled with accurate facts and information. I appreciated the workshops with my classes so that I would be familiar with the technology and be able to use it to its full potential.

the staff, material, and environment are impeccable at the Albertsons Library.

The reference librarians are especially helpful. They'll go out of their way to help you find what you want.

Some public service staff are much more willing and pleasant in helping patrons than others.

The staff is excellent--very well trained, knowledgeable, and helpful.

sometimes it is difficult to find help from library staff.

Help at reference desk, but it's intimidating to ask a question
One student mentioned telephoning the reference desk to ask us to look-up a book for her and hold it and reports encountering an unfriendly voice. She reports thinking “I'll never do that again!”

SLAC

Faculty Focus
Groups
Librarians very friendly and open-minded.

Faculty Focus
Groups
Librarians really helpful, even walked them to find book.

Focus Groups
Undergrad
Having a chat box to just type into would be good.

Focus Groups
Undergrad
Really funny and nice.

Focus Groups
Undergrad
The librarians can always search better than me.

QuestionPoint
Survey results
The library staff was really great and fast! Thanks. [QuestionPoint staff] did a great job helping me out. Apparently my textbook and a lot of other people are referencing a link that does not seem to exist anymore and I'm not familiar with how to find a backlink to the article I am looking for. I have another 3 or 4 weeks before this project is due so I have time to work on it. Great job! Thank you!

QuestionPoint
Survey results
Did not resolve my problem.

QuestionPoint
Survey results
Very helpful and it was quick. I am impressed with the Library Staff.

[My librarian] was VERY thorough in helping me find where I needed to go, which is much better than taking all my time to just figure out the website. Thank you!

QuestionPoint
Survey results
I did feel like the librarian helping me was in a bad mood of some sorts, but other than that they were great. The person was in Hawaii and asked me if I tried to use the library’s website! That was what my question was about. Then they didn't know what part of the website I needed help with. I will have to go to the library and get help in person.

QuestionPoint
Survey results
This is an awesome service. Thank you for having it as an option.

[QuestionPoint staff] from Wisconsin was the best!

QuestionPoint
Survey results
I appreciate the 24/7 service as a grad student.
<table>
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<tr>
<th>QuestionPoint</th>
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<td>I didn't realize making such small search changes would have such an impact on the return. I feel like I can better navigate that search engine now.</td>
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<td>Great Job!!!! Thanks for all the help!!!</td>
<td>Very helpful! Im glad i used it. It made finding my information easier.</td>
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<td>While nothing was found during our session, the librarian was diligent in researching and will be getting back to me with any results found. Great service.</td>
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<td>[Library staff] from the BSU library responded much faster than I expected. She had the perfect answers and directions on how to find what I was looking for. If I ever have another question I won't hesitate to use the chat service again. I'll probably tell everyone about it! Thanks so much for the service!</td>
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<td>this was wonderful!</td>
<td>I would have tried to figure out how to log into google scholar for ever before giving up! This is a great idea I know I will be using it again!</td>
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<td>Very friendly</td>
<td>[QuestionPoint staff] was great and helped me figure out what I needed to!</td>
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<td>Excellent service and very fast.</td>
<td>Thank you very much.</td>
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<td>The way my librarian described this led me to believe that I would always speak with someone at BSU. Therefore, my question was not able to be answered because I was not talking to a BSU person. It was misleading.</td>
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<td>this has changed my life as an online student!!!</td>
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<td>[Library staff] rules!</td>
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<td>I was completely stuck in finding resources through the BSU library and other information aside from the event's website and I am so thankful for the help of the librarian online. I will surely use this option in the future.</td>
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<td>She didn't know the answer to my question.</td>
<td>The librarian who helped me was incredibly kind and helpful, especially considering I was asking about specific BSU Albertsons Library services and she was in DC. Thanks!</td>
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<td>Loved how fast the response was!</td>
<td>The help I received was quick and to the point. The librarian found exactly what I needed and was very friendly.</td>
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<td>SMS ADVANTAGE: They offer different topics in my research, not the obvious one I have thought of.</td>
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<td>Chat/SMS Study</td>
<td>DESK DISADVANTAGE: I think librarians have a bad reputation for being cranky and that is why I am always hesitant in asking for help. Additionally, it is not as convenient to have to make an extra stop at the library for help when you have such a busy life.</td>
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<td>SMS ADVANTAGE: you get instantly and from your phone don't have to drive in. I live in Nampa so that was great.</td>
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<td>SMS DISADVANTAGE: Based on my experience, the response was very basic and a source I was already familiar with, and I had been hoping for something more in depth that I did not already know of.</td>
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<td>SMS ADVANTAGE: The advantages are that if you have your own computer and you just have a quick question you can send a text rather then pack up all your stuff and go ask the ref. desk. Also, it is more anonymous, so if you feel the question is stupid you can't be judged.</td>
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<td>SMS ADVANTAGE: The advantages of Text Messaging Reference are that I can get help from anywhere. I'm a full time student and a mom of two with a husband that works out of town. I like to be able to do as much as I can at home where I am with my children. Searching for reference material can be a bit intimidating because there is so much information out there, it is nice to be able to check and see that I'm searching in the right places. It helps me to be less frustrated.</td>
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**CHAT/SMS Study**

SMS Disadvantage: Not having a quick back and fourth conversation like you regularly would with a person at the desk. And through text you can only say so much before your texting limit is reached

Chat advantage: The instant messaging was easy to access and it was a casual experience. I felt like I was talking to a friend and I felt comfortable enough to write informally.

You can explain yourself alot better as well as just have a personal one on one contact.

Sometimes it is easier for me to explain in person because I can blabber on and sooner or later the person will understand.

The disadvantage is that the conversation could have some misunderstanding just because emotions and things aren't easily displayed in a chat.

I didn't think the instant messaging was going to be that helpful. I thought they were going to refer me to the sources I have already sought out. On the contrary they were very helpful and I think it was easier to use it than talk with a librarian in person because they are always busy. I also didn't have to get up from what I was doing and they could answer me right when I was. It was as if they were my waitress, they kind of came to me for help in the fact that my question was answered right at my computer where I was working.

It's accessible anywhere, the transcripts are mailed to you, you don't have to feel stupid or judged based on your topic you cant physically get the information unless you go to library.

**CHAT/SMS Study**

SMS Disadvantage: Have to wait for an answer and the answer could be misinterpreted.

Chat advantage: You can hear and see the person talking to you.

Sometimes it is easier for me to explain in person because I can blabber on and sooner or later the person will understand.

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