Discussion Topic #6: How are academic reference departments evaluating their services in this era of assessment and learning outcome measures?

Discussion Leaders: Barbara Schloman (Kent State) and Carolyn Radcliff (Kent State)

A. Questions we provided the attendees to promote discussion:

1. What have been the underlying principles or objectives for evaluating your traditional reference service? Are these changing?

2. What elements of reference have you been particularly interested in assessing (# users, satisfaction, success)

3. What methods of reference evaluation do you use? Do you have a method that you think is particularly useful?

4. How do you use the results of your evaluation efforts?

5. Are any of your evaluation efforts related to performance evaluations?

6. Are you held accountable for the performance of your reference service by your administration (library or University)?

7. What obstacles have you encountered in doing evaluation?

8. What resources have you found helpful in your assessment efforts (e.g., campus institutional research office, ACRL, colleague, library listserv)?

9. What would like to be able to measure? What would you need to accomplish that?

10. Any thoughts of how we might be able to evaluate an OhioLINK reference chat service?

B. Group discussion:

Existing assessment/evaluation efforts

1. For management of service:
   a. Keep use statistics for possible changes in staffing patterns. For one library this includes identifying user, type of question, time of day.
   b. Hash marks to determine what level of staffing needed at what time of day.

2. To monitor user satisfaction:
   a. Use surveys: those created by others (ALA) or create own (can be difficult to do).
b. Wright State does spring online user survey on their Web site. Received 1000-2000 responses. Questions such as "Why do you/would you use Questia?" Responses serve as a general indicator that can demonstrate library's role to the Provost.

3. Reflective practitioner: individual reference librarian tracks reference questions, what the user ended up with as a product, and an intuitive sense of user satisfaction. Used to modify and improve individual practice. What similar cues are available to us in the virtual world? Doug Kaylor has used a checklist to do this monitoring (his follow-up message and copy of form are attached).

4. Reference service more closely tied today to instructional efforts. Finding way to measure longer term outcomes desirable. Many variables that influence student learning make determining the library's role difficult.

   a. Portfolio assessment project one possible way.

   b. Finding a way to follow an identifiable cohort (possibly using student ID numbers with permission and then tracking student performance).

   c. Term paper evaluation to help assess information literacy.

5. Service quality:

   a. WOREP (Wisconsin Ohio Reference Evaluation Program) provides validated instrument to determine effectiveness of the reference encounter.

6. Assessment as a political and economic tool to demonstrate effectiveness and needs to higher administration.

7. Indicator for staff training:

   a. Track questions and sources to pinpoint training needs.

8. Use of helpdesk software to build knowledge base for use by both public and staff. Also useful in tracking questions to aid in training.

9. Virtual reference: has to be highly visible and friendly and inviting. Specify the expertise of the service providers.
> Subject: follow-up to yesterday's ref assessment discussion
> Date: Fri, 14 Dec 2001 10:21:50 -0500
> From: Doug Kaylor <doug.kaylor@wright.edu>
> To: schloma@kent.edu, radcliff@kent.edu
> 
> Barbara and Carolyn,
> 
> 2 points I thought I'd follow up on from yesterday afternoon's
> discussion session. You can include them or not in what you distribute.
> 
> 1. The Libraries' online survey. Yesterday I was asked who designed the
> questions, and I said the Libraries did. Actually, we came up with the
> questions we wanted to ask, and then a faculty member with expertise in
> surveying reviewed and "corrected" them for us. Thus, while the survey
> was not scientific and the questions were not pre-tested, we did have
> the benefit of expert advice.
> 
> 2. Reference charting.
> 
> I know this gets people shaking their heads and asking what's wrong with
> me, but if we claim that reference service involves a professional
> interaction between a librarian and a user, then I would argue that part
> of the librarian's professional performance should include a valid
> assessment based on observations and judgments about the patron, the
> interview, and its outcomes.
> 
> I'm attaching the last chart I used for this purpose. In checking back,
> I find that I developed this particular chart in a series of stages
> between February and November 1997. This morning, I converted it from a
> wordperfect to a word document, but otherwise it is the last chart used.
> If I started it today, it might be different because people and their
> technology skills are different today due to the diffusion of the web
> and personal computing. But I think anyone looking at it can get an idea
> of what I was trying to do.
> 
> We generally accept the fact that health care professionals can make
> valid assessments of patient care or that teachers can assess the
> performance of the students they teach. In both of these examples, I
> know there are other forms of assessment going on: utilization review
> boards, hmo reviews, 4th grade and other proficiency exams, etc. But in
> these cases, the "professional" is actively involved in assessment, and
> really, makes the daily evaluation of performance, whether patient by
> patient or student by student. Why don't we do the same as reference
> librarians?
> 
> Enough of the soapbox. Now that I've pulled out the chart, I think I'll
> try it out again for a quarter. If I remember correctly, it's not really
> that hard to use once you become familiar with the outcome categories.
> 
> Have a happy holiday season,
> 
> Doug
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**Ready Reference**

- Gen. Dir.

**Comments**

- Close

**Library systems / web site**

- Close

**STAR:** Acknowledge Listen Reiterate Respond Confirm

**Service Pace:** Rushed Busy Steady Quiet

**Patron State:** Positive Neutral Unsure Frustrated Impatient Angry

**Info. Product:**
- E = info. in hand, elec.
- P = info. in hand, print.
- O = onscreen info. to review
- B = bibl., printout
- R = referral
- N = not found

**Cognitive:**
- U = understands
- F = partial, functional
- N = neutral
- D = doubtful
- N = does not understand

**Attitude:**
- S = says satisfaction
- A = appears satisfied
- W = says it will do
- L = appears less than sat.
- D = says dissatisfied

Form: 12/01
Definitions

Pace (the general business at the time of the interview)
- R = Rushed
- B = Busy
- Q = Quiet

Patron State (Initial attitude)
- P = Positive
- N = Neutral
- U = Unsure
- F = Frustrated
- I = Impatient
- A = Angry

Info. Product: (from the perspective of the patron)
- E = Info. in hand, elec.
- P = Info. in hand, print.
- B = bibl., printout
- R = referral
- N = not found

Cognitive:
- U = Understands – patron says they understand and demonstrate that they can do their desired activity (search, read, etc.)
- F = partial, functional – patron doing the search, going to stacks, etc., but they don’t appear to really understand or express doubts
- N = neutral – no observable cues
- D = doubtful – patron may say okay, but they show
- N = does not understand

Affective:
- S = Says satisfaction
- A = Appears satisfied
- W = Says it will do
- L = Appears less than sat.
- D = Says dissatisfied

Completing the Chart:

1. Note date, day, shift, who is working the information desk and who is working on the floor (if it’s a time when two are assigned)
2. P/S = Pace / Patron State– Is it a busy day on the reference floor? Are you rushed? Is it slow? Note the initial state of the patron: does the interview process start with an angry patron, positive patron, etc.?
3. Note the query in the box
4. Confirm = (checkmark) At the end of the reference process (Acknowledge, Listen, Reiterate, Respond, Confirm), did you actually confirm that the service provided met the patron’s expectation?  
5. Outcomes: Indicate the observed outcome for the Information Product, Cognitive, and Affective. There are two sets of boxes for each outcome to allow for tracking of follow-up questions.
6. Ready Reference and General Directional: Track with simple check to get numerical counts
7. Comments: Note any issues or problems that impacted on the shift. Also note anything that requires follow-up actions after the end of the shift.
7a. Comments Close: Record that you actually followed up on comment after the shift.
8. Library system/website: Note any web, database, or system issues that need to be followed-up on after the shift.
8a. Close: Note when the system issue is reported, closed, etc.