Minutes: Metro Library Librarians Meeting

11 July 2017

In Attendance: Melissa Kash, Bob Holzmann, Adam Brennan, Amy Lagers, Elizabeth Szkirpan

Information Desk Staffing Model

- The new tiered reference staffing model is going okay. Elizabeth is spending less time on the desk, but Amy and Adam are still spending many mornings on desk due to coverage issues.
- Once the new employees are trained, Travis will be switching to day shifts, though his specific hours and when he will switch has not yet been fleshed out. This should help coverage a bit. Melissa mentioned that we can pull Victoria and J.P. from the Library Workroom if needed.
- There aren’t too many student referrals yet but summer will look different from fall and we should see things picking up at that point.
- Elizabeth mentioned that communication has really improved amongst librarians since switching to a tiered model. Skype has been the primary method of communication, though librarians are also emailing or visiting with one and other to arrange for office hours to be covered.
- Melissa mentioned that neither Kristi nor Jao-Ming will be able to get phone lines since austerity measures have begun.
- Melissa asked if we have been using the READ scale that was suggested by Jao-Ming, but the librarians indicated that most contact to librarians at this point has been regarding desk coverage.
- Melissa asked Adam to bring the READ scale to the Library Assessment work group for consideration.
- Melissa indicated that READ question tracking should not interfere with regular question tracking, so perhaps instead of tracking types of questions with tally marks, we should be tracking questions with numbers to indicate question level. She also mentioned that one of the articles Jao-Ming found and distributed to the librarians contains a stripped-down READ scale that may be easier to work with than the original READ scale (READ-ing Our Way to Success: Using the READ Scale to Successfully Train Reference Student Assistants in the Referral Model by Vassady et al, 2015, page 542. Please see attached articles).
- In conjunction with this discussion, Amy reminded Elizabeth that Elizabeth will need to create a new research consultations poster to include our newest librarian, Kristi. Melissa suggested that the new poster should be blown up and printed out by Game Plan to create something we can display on an easel. Elizabeth is going to create the new poster and submit it to Game Plan to do this.

Classroom Booking
Amy approached Lisa Halderman from the Northeast Campus Library and asked how NEC mediates classroom bookings. We have had some challenges with librarians approving classroom bookings, but there has been no notifications to the librarian intended to teach the class that they are supposed to do so. Lisa said that NEC never approves bookings for a librarian other than themselves, so if you approve a booking, you intend to teach the class. NEC roughly blocks their day so that Lisa teaches morning classes, Andy teaches afternoon classes, and Katherine teaches night classes, but regardless, they don’t approve classes for someone other than themselves.

Back-end bookings don’t send librarians emails, so Amy suggested that instead of booking on the back-end for an instructor, staff and librarians use the front-end booking tool or ask an instructor to book using the library website. The other librarians agreed with Amy and determined that this is how we will book classes from now-on.

Melissa indicated that we will discuss this at the upcoming staff meeting (July 17), but in the meantime, we should speak to staff about this new booking procedure.

There was also a brief discussion between Amy and Adam on following NEC’s method of roughly blocking our day by which librarian should teach at which time. Amy and Adam briefly indicated that we may be able to have Adam teach mornings, Amy teach afternoons and rotate with Jao-Ming, and Kristi teach evenings, though it depends on schedule, availability, and specialty.

**Onboarding Kristi**

- Melissa has asked Amy, Adam, and Elizabeth to each work an evening with Kristi so that we each get to know her. Amy has already worked with Kristi, so Adam and Elizabeth will have to schedule an evening and let Melissa and Kristi know when they plan to do so.

**Mentoring**

- After talking to Jamie Holmes from Southeast Campus’s Library, Melissa found out that Southeast Campus has an informal mentorship program where librarians mentor staff members. Melissa would like us to consider this and implement it at our own campus.
- We will not immediately start this, so Melissa would like us to start thinking about it.
- Adam, Amy, and Elizabeth will divide up the six part time employees (Bekah, Patrick, Josh, Lisa, Jao-Ming, and Kristi) for mentorship.
- A discussion ensued on how we should divide up employees and who should work with whom. Amy may mentor Kristi since she is already mentoring Kristi a bit. Josh is interested in pursuing an MLIS so perhaps there should be a special focus on that for him. Both Adam and Elizabeth have talked to Josh about pursuing an MLIS and have offered advice. Elizabeth indicated an interest in
working with Bekah since they have similar interests and get along well, but Elizabeth does not get much of a chance to work with Bekah on the desk. Adam indicated that he has great rapport with Lisa, Josh, and Jao-Ming. Melissa asked who should work with Jao-Ming and both Amy and Elizabeth indicated that they did not mind working with him, but since he has been at TCC longer than either Amy or Elizabeth, perhaps it would be most appropriate for Adam to mentor Jao-Ming. Amy indicated that she defacto mentors Bekah to some extent since Bekah is a school librarian at her other job and has asked both Amy and Kristi about school librarianship. Amy indicated that she may defacto mentor Patrick because he works later in the day and Adam leaves fairly early during normal hours.

• After this discussion, the librarians and Melissa determined that Adam will mentor Josh and Jao-Ming, Amy will mentor Kristi and Patrick, and Elizabeth will mentor Bekah and Lisa.
• Melissa has asked the librarians to think about what purpose this mentoring should be and what it should look like before the next librarians meeting.
• Melissa also asked Amy to asked Jamie from SEC what their informal mentoring entails.
• Adam also suggested that Melissa talk to Stewart Bowman from OU-Tulsa’s library since Stewart has an interest in the role of mentorship and has done extensive research on the purpose of mentorship in the workplace.

BizMiner

• Melissa asked Adam to briefly talk about BizMiner, but due to time constraints, Adam was not able to delve too deep on the subject. Adam did cover that BizMiner is a database available through Tulsa City-Country Library and you can access it through TCCL’s website with a library card.
• [From the BizMiner website: BizMiner is a business database that allows you to pull financial and market analysis reports for the purpose of investigating an industry. Lear more here: https://www.bizminer.com/]

Librarians Meeting Scheduling

• Melissa indicated that Metro Librarians Meetings have not had a regular date and time and asked if the librarians would be interested in arranging an outstanding meeting date and time.
• After agreeing that this would be fine, the librarians and Melissa agreed that meeting the second Tuesday of the month at 10 AM for 1.5 hours (to allow for going over on time).

Liaison

• Melissa asked if there were any LibGuides that matched our liaison duties that we wanted to take ownership of, and mentioned the Native American LibGuide. Amy has already talked to Megan Donald from the West Campus Library and will
be taking over this LibGuide in addition to creating a Humanities LibGuide for use by the Humanities Department.

Librarian Updates

Elizabeth

- The RDA conversion has gone well and is fully implemented. There was a training session a few weeks ago for Cataloging and there will likely be a follow up training soon.
- The Children’s Collection retrospective project is complete.
- LGBTQ+ Collection Development has gone well. J.P. created special labels for the collection and all of the new books have been cataloged.
- Digitization of cataloging files is underway and is about 50% complete. Elizabeth has been uploading files to their appropriate homes online.
- Heritage cataloging is going well and we are on-track for the soft launch in January 2018.
- The Intranet Content Management plan was submitted and is being considered by LMT. Elizabeth and Andy from NEC are waiting for instructions on what to do next (they are meeting with LMT July 18th), but Elizabeth is working on building a mock SharePoint and a SharePoint content management plan in the meantime.
- The YA Collection review will likely not happen due to project scope. Instead, Elizabeth and Victoria from Technical Services are working to correct problems as they find them.
- Elizabeth is meeting with Michael Speck on Thursday, July 13th to discuss the next step in the Law Collection review.

Amy

- Working with Kristi Merchant as she comes on board for the evening shift.
- Framework study:
  - Read The One-Shot Library Instruction Survival Guide by Heidi E. Buchanan and Beth A. McDonough.
  - Started the 23 Framework Things: [https://23frameworkthings.wordpress.com/](https://23frameworkthings.wordpress.com/)
- Created new framework posters for the classroom. Sent to GamePlan for printing.
- Reworked the Leisure Reading section. It is weeded, up to date, and matches the catalog locations. New books are being added as they come in.
- Displays:
  - Travel the World
  - Books to Movie
  - Study Skills (Coming in August to the front window.)
- Sent out a proposal to elibrarian for a Humanities subject guide. Beginning to work on that now.
• Reviewing the Native American Subject Guide for update and reactivation.

**Adam**

• Finished my contributions to the FYE seminar master course. This included production of a video tutorial and adding research terminology into the textbook.
• Met with Jon Tanzey, Annina Collier and Greg Stone about his work promoting the value of critical thinking and a general education. Greg wants to have events throughout the year that hit this theme. I’ve contacted the marketing department about getting involved.
• In second stage revisions of the AiA manuscript that goes in for publishing July 17th.
• Working on a Blackboard module for composition courses that can be dropped into a BB instructor page if they so wish.

**Bob**

• Library Servers / Resources & Data Storage – Continuing (Sparky underway, Tech Services moved off, Heritage prep)
• Databases/eResources Statistics (ODL/OCALD) - 6-month and Library Annual Report Stats – Now due July
• GOBI – setup complete for Tech Services Workflow, need to communicate with Librarians
• Heritage/archives project – with Andy leading, Digitization, Planning, System/Tech, Themes - ONGOING
• Hope Is the Last Thing to Die reprint, eBook awaiting technical tips, methods to restore, UNDERWAY
• Website Review - A-Z improvements FINISHED – with Megan (new books UNDERWAY, searching widgets DONE, Best Bets REMOVED, Added/Removed Databases - UNDERWAY
• E-resources Review (links online, journal review, cleanup, permissions files and online fields, etc.) (UNDERWAY)
• WMS Reports/Analytics (SUMMER, FALL) – need a number of Reports
• WMS & Discovery Review (config’s., updating the KB, Etc.) (JULY/AUGUST)
• OneDrive use, collaboration sharing (individual), ad hoc share development, with Jake/I.T. – UNDERWAY
• Appointed to lead the Assessment of Library Services and Programs (non-instructional) Work Group – UNDERWAY
• Documenting Systems/Technology work - UNDERWAY
READ-ing Our Way to Success: Using the READ Scale to Successfully Train Reference Student Assistants in the Referral Model

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ABSTRACT. The Reference Services Department at Radford University’s McConnell Library has been developing a training program in the reference referral system for student assistants (SAs) over 3 academic years. The program’s goal is to effectively instruct SAs in balancing high quality customer service with the importance of appropriately referring users to librarians and to assess the accuracy of their referrals and responses. The trainers have met these goals with the successful incorporation of a modified version of the Reference Effort Assessment Data (READ) scale, a reference transaction assessment tool developed by Bella Karr Gerlich, into the student training program.

KEYWORDS student library assistants, student workers, student assistants, training, student training, academic libraries, library employees, universities, colleges, reference services, referrals, consultation, assessment
Over the past several years, Radford University’s McConnell Library’s Reference Services Department began to notice significant changes in reference services that contributed to departmental consensus that the library was operating under an outdated reference-service model. There were several contributing variables: First, a steady decline of in-person reference transactions over the last decade; the majority of in-person questions were simple, nonreference questions that did not require the extensive knowledge and experience of librarians; and a growing need for instruction meant that new hires’ position descriptions included instruction components that comprised a larger percentage of their job description than did reference. Thus they are assigned fewer hours than their predecessors. After an intensive examination of the alternatives, the department settled on the idea of training student assistants in the referral model, with these assistants taking front-line staffing responsibilities and referring questions to librarians when needed.

McConnell Library is the sole library for Radford University, a medium-sized, comprehensive state university with roughly 10,000 students. It has a single reference desk, now called the Research Help Desk, which is open approximately 65 hours a week when school is in session. The reference department is made up of seven librarians, five of whom have instruction duties, one permanent part-time paraprofessional and, when funding is available, one temporary 10-hour paraprofessional. The department currently employs nine graduate and undergraduate student assistants to help answer questions at the Research Help Desk and has relied on student assistance for many years, with one to two assistants and one librarian working together at the desk as a team.

AREAS OF CONCERN: REFERRAL MODEL

When Reference Services began designing its 4-year plan for transition to a reference referral model in spring 2012, two areas of concern were in the forefront of the librarians’ minds: How to ensure high quality customer service, and how to ensure our student assistants would refer patrons to librarians when applicable so that patrons received the highest quality research assistance possible. Reference Services’ hiring process focuses on finding student assistants with inherently strong customer service skills, and there were some concerns that personality traits and training methods that contribute to excellent customer service may inhibit students from referring questions. There were also significant concerns regarding training students to accurately gauge when they should refer.

The literature also reflects these concerns. In describing their transition to a student assistant referral model, Davidson and Mikkelsen (2009) state this problem exactly: “...perhaps the most challenging part of training our
student assistants has been teaching them to properly refer difficult reference questions” (p. 352). The anecdotal evidence they give echoes strongly our department’s concerns, the foremost being that the students are not aware of what they do not know and hence feel a false confidence resulting in incomplete or inaccurate responses.

Davidson and Mikkelsen (2009) also mention a student assistant’s reluctance to refer when they are aware the librarian is occupied with another aspect of the job. Our student assistants have shown a reluctance to interrupt (or what they see as an interruption) a librarian and feel the need to give quick service to our patrons. The last issue related by Davidson and Mikkelsen (2009) is a fear of appearing incompetent. We have seen this when students mistakenly thought that they were expected to learn a complex task after one lesson or if they erroneously thought they had received training in an area.

In Hammill and Fojo’s (2013) description of Florida International University’s Glenn Hubert Library’s move to a referral system, the circulation desk librarians chose to implement a secret shopping assessment of their student assistants that was similar to models used by market research firms in assessing sale clerks in stores. Trained volunteers from the campus community asked select questions anonymously and filled out a questionnaire detailing the experience. The library conducted three rounds of secret shopping studies that included the assessment of customer service, measured accuracy of information delivered (the latter having been anecdotally noted by reference staff), and referral accuracy. Information accuracy was found to be a concern because students were described as being unable to answer some basic catalog questions. Referrals showed a marked improvement over the course of the three rounds, and the authors presumed this was the result of improved training based on assessment of previous rounds. McConnell Library has itself used secret shopping with demonstrated success in evaluating customer service at their reference and circulation service points and to identify areas of improvement with library staff as evidenced by the report of Benjes-Small and Kocevar-Weidinger (2011). Initial efforts were geared toward all staffing, including librarians and students at those desks. During our pilot year of training student assistants for the referral model at the Research Help Desk, the department implemented a secret shopping effort of only these students. This measured primarily customer service and success at conducting a reference interview. The selection of sample questions was viewed as too limited to measure accuracy in answers and referrals.

Dinkins and Ryan (2010) describe creating a referral program using a paraprofessional. While not technically a student, the experience level and age, 23, of the newly minted, college graduate paraprofessional provided enough similarities to our student assistants to be relevant. The paraprofessional kept a record of every question he referred, recording the actual questions asked. Dinkins and Ryan (2010) described their experience as
a great success story. However, success was based on a decrease of self-reported referred questions by the paraprofessional between the initial fall semester and the following spring and the correlating conclusion that the paraprofessional was accurately answering these questions based on knowledge gained from experience of self-reported of referred questions by the paraprofessional. No records of non-referred questions were kept, nor was there any indication of the answers given out.

The McConnell Library reference team deemed analysis of those questions not referred to be just as important, possibly more so, then those referred. Student responses needed to be analyzed for accuracy and assessed for the need for future training. The reference team observed that some of the department’s student assistants had picked up a significant amount of information regarding reference assistance prior to the start of referral training in 2012, so some accounting of what may have been picked up outside of official training needed to be recorded.

Anecdotal evidence collected while the authors’ poster session, *Reading Our Way to Student Training Success*, was presented during the American Library Association’s 2014 Annual Conference indicated that there is significant concern regarding accuracy of referrals by student assistants and interest in successful training methods among attendees of the poster session (L. J. Vassady, personal communication, June 28, 2014). Little is written on this concern in the library literature, perhaps as few libraries are choosing to publish on such training programs. In their survey of Alabama’s academic libraries on the theme of student-assistant training programs, McLaney, Vardaman, and Webb (2004) noted that a third of their respondents did not document their training programs; documentation as defined by the survey included peer training and interactive programs, video training, group tours, written manuals, PowerPoint presentations, direct observation, and checklists. With such a high number of undocumented programs it may be assumed that a number of programs do not undergo assessment of training.

**READ SCALE**

When implementing the new referral training program, it was quickly determined that it was highly desirable to include the Reference Effort Assessment Data (READ) Scale (Gerlich & Berard, 2007) in the training, as using the READ Scale is an integral part of data collection for the department. The reference staff consistently rate all reference transactions, whether they are in-person, chat, IM or phone, using a simplified version of the READ Scale developed by Gerlich, Alexander, and Berard. The scale was designed to provide assessable qualitative data that measures “the skills, knowledge, techniques and tools” employed in every reference transaction.
The original scale was six points, with those numbered one being the easiest to answer, requiring the use of the lowest level of the four measures, with each higher number progressively requiring greater amounts of knowledge. Our reference librarians modified the scale several times to meet the library’s needs, resulting in a five-point scale, with simpler questions assigned the values of 1 or 2, and more difficult, in-depth questions assigned a 4 or 5. This scale is explained further in depth under the READ Scale Training section of this article.

It should be noted that our reference staff decided to define a transaction as any single interaction with a patron, no matter how long it lasts or how many questions were asked during that interaction. Some libraries handle this differently. Flatley and Jensen (2012) recommend that librarians may want to consider when measuring transactions by means such as the READ Scale, that when faced with an instance where multiple questions are asked in a single encounter, each question might be treated as a different transaction. Empey (2010) indicates that when the University of Northern British Columbia’s Geoffrey R. Weller Library conducted a study of reference transactions that analyzed and compared data collected in both 2006/07 and in September 2009, reference staff were required to treat multiple questions asked by the same patron in this manner.

The READ Scale data offered reasons for switching to the referral model with quantitative support of the anecdotal sense that the majority of in-person questions were simple and did not require experienced librarians. The majority of these transactions were found to be READ Scale ratings of 1 or 2. This data was given further credence by Gerlich and Berard’s (2010) study conducted in spring 2007 of 14 academic libraries that employed the READ Scale that noted the majority of in-person transactions at these diverse institutions were rated on the READ Scale as level 1. Comments in this study also indicated that some libraries used this data to change staffing practices—the results did not indicate how many used this to justify a referral system.

McConnell Library also used the data to improve the reference team. It was noted that ratings varied between team members in the department, sometimes significantly. As Head of Reference Services and Librarian Assessment, Ackermann (2011) designed a series of norming exercises that the department worked through and then discussed, leading to more consensus on the ratings. This project was enhanced by the employment of the reference analytics module of SpringShare’s LibAnswers. This provided the reference team with a database of reference transactions that included both questions and answers along with READ Scale ratings and other fields, including transaction time, which can help with determining READ ratings.
It also led to the aforementioned modifications of our scale over the years. In McLaughlin’s (2011) survey of different approaches to reference transaction assessment in the first decade of the 21st century, she noted that multiple authors found a benefit to modifying reference transaction categories based on such assessment. Careful review of READ Scale ratings coincided with a review of the data input for questions and answers. The team worked to improve their responses and noted areas that needed improvement. In Gerlich and Whatley’s (2009) account of Georgia College and State University’s utilization of the READ Scale in regard to referral training for their evening and part-time reference staff, they indicated the staff were guided to refer READ Scale questions of 3 or higher. The McConnell Library Reference Services Department employed this same approach to using READ Scale guidelines, though students were allowed to answer those READ Scale questions they had been trained on, and deemed this highly valuable in any student assistant referral training.

STUDENT ASSISTANT TRAINING PROGRAM

The Reference Services Department’s referral student assistant training consists of several elements, commencing with a checklist. The checklist introduces students to different tasks that the reference team discussed with student assistants to ensure a baseline standard of service. This has a corresponding list of detailed talking points for librarians to cover with assistants to ensure that each librarian who helped to train students on the desk covered the same general points, to the same approximate depth. The checklist topics include a discussion of the READ Scale and serve as a new assistant’s introduction to the concept of rating questions and referral. It also requires them to review the student assistant manual, which provides the student assistants with the department’s baseline expectations.

The program also includes several group training sessions to discuss departmental expectations and teach valuable skills, including customer service, conducting a reference interview, and, most importantly, using the READ Scale accurately to identify questions that should be referred to a librarian. The department agrees on the topics and objectives for each session, then two librarian instructors are assigned to plan and teach a particular session. Each librarian teaches at least one session, with some teaching two, to ensure the students have the opportunity to work with different librarians.

After piloting the training program during the 2012–2013 academic year, 2013–2014 saw the return of only two student assistants (both seniors) to the Research Help Desk (and one of these for only half the year), with six new student assistant hires. With a student assistant team comprised primarily of
new hires, the department decided to cover the same topics while retooling and further expanding training and assessment.

GROUP TRAINING READ SCALE AND THE REFERRAL MODEL

The READ Scale training's primary objectives were similar for both years, though there were some variations based on differences in the group session scheduling between the 2 years. The shared objectives were: Students will learn why the department used the READ system; students will learn how to determine a reference transaction’s READ Scale rating; and students will learn when to refer questions. Another commonality was the decision to include active learning activities in the sessions, as the authors’ background in instruction made them aware of the value of incorporating active learning into any instructional session in order to encourage learning. They also had found that the student assistants were particularly engaged by games, even to the point of some students recommending certain types of games for future training sessions, such as Bingo.

While the READ Scale training sessions’ objectives were the same for both years, assessment of the 2012–2013 year plus ongoing observations and discussions during 2013–2014 led to some variations in how the
sessions’ content, handouts, and exercises were handled between the 2 years. One major contributing factor was a mandate in the 2013–2014 year to assess student comprehension via “At the Desk” quizzes after each group session.

In 2012–2013 student assistants were introduced to the READ Scale via a handout, with the request to refer or collaborate with a librarian on READ Scale 3 or higher. Student assistants played a game of green light/red light with sample reference questions of easy, medium, or hard difficulty. Assistants could move forward a big step on easy questions, a small step on medium, and not at all on hard. If they were incorrect in their identification, they would have to go backwards. The training then divided the students

FIGURE 2 READ Scale rating definitions.
into pairs and had them look at sample transactions from LibAnalytics and rate them according to the READ Scale, then discuss as a group. For this exercise, students were given the READ Scale quiz (see Figure 1) that was based on a tool created by Ackermann (2011) as a norming exercise for the librarians when the department first used the READ Scale.

<table>
<thead>
<tr>
<th>Sample Question &amp; Answer Pairs</th>
<th>1</th>
<th>2</th>
<th>3</th>
<th>4</th>
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<tbody>
<tr>
<td>Q. Where do documents sent to the color printer go?</td>
<td>Q. I couldn’t find this book on the shelf.</td>
<td>Q. How do I scan this article?</td>
<td>Q. I have two websites with the same author. One has 2011 as the date and other has no date. In APA which one do I list first in my reference list?</td>
<td></td>
</tr>
<tr>
<td>A. Directed the patron to the Front Desk</td>
<td>A. Patron had title and call number on her phone. The book was in the oversized section. I helped her find the book on the shelf.</td>
<td>A. I showed him how to use the scanner to create a multi-page PDF.</td>
<td>A. I consulted the APA manual and did not find an answer to this. I also looked at the APA blog and Googled it, but again did not find an answer. I told the student I was unable to find the answer and suggested she contact the APA Style Experts through the APA Website.</td>
<td></td>
</tr>
<tr>
<td>Q. How do I get to the conference room?</td>
<td>Q. How do I email a Word document to myself?</td>
<td>Q. How do I create a reference for this scholarly article in APA that has multiple authors?</td>
<td>Q. I need to find scholarly articles about police partner selection.</td>
<td></td>
</tr>
<tr>
<td>A. Directed the patron to the correct staircase and elevator</td>
<td>A. I showed her how to add an attachment to her email.</td>
<td>A. I brought up the APA online guide. Showed her how to select scholarly journal articles in the “I want to cite” tab. I pointed out the “What’s on this page” box and the link to the example for “What if I have lots of authors?”</td>
<td>A. I looked in the criminal justice databases, the legal databases and in Google Scholar. I also tried various search terms.</td>
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The 2013–2014 academic year brought with it the creation of a color-coded version of the department's READ Scale cheat sheet (see Figure 2), which was introduced at the beginning of the training session.

The green, yellow and red colors were chosen to help the student assistants understand the levels of difficulty with various reference questions and helped frame a discussion. As the student assistants can answer all 1 and 2 levels READ Scale questions, they feel comfortable answering READ Scale 1 (Quick & Easy) and READ Scale 2 (Show & Tell), which are coded in green. Librarians ask assistants to use caution when answering 3s alone and suggest they bring in a librarian if it is a question that they have not consulted with a librarian previously, so READ Scale: Basic Skills Employed section is coded in yellow. First-year assistants are requested to bring in a librarian for all 4- and 5-level questions, hence READ Scale 4: Intermediate Skills Employed and READ Scale 5: Advanced Skills Employed are in red. The cheat sheet includes definitions and examples for each category.

The authors designed an active-learning matching game for this session. Sample question and answer pairs were created based on the READ Scale 1–4 difficulty levels on the cheat sheet, so they would be easily matched with the appropriate READ Scale numbers. Each question and answer was put onto its own slip of paper without the READ Scale rating (see Figure 3).

During the training, teams of two student assistants were each given two question-and-answer slips, one with a value of READ Scale 1 or 2, and the other of READ Scale 3 or 4. The students were instructed to determine the READ Scale rating for each of their slips, then consult with the other teams to locate tiles of matching READ Scale ratings.

The students were successfully able to both identify and match pairs for READ Scale 1 and 2. There was some confusion in regard to differentiating between READ Scale 3 and 4 pairs. The students pointed out that two of the questions and answers involved citing with American Psychological Association Style Citations (APA) and because they had not received any training in APA, they were not sure how to interpret those slips. As the students correctly differentiated between READ Scale 1 and 2 questions and were able to determine that the remainder were READ Scale 3 or higher, and the latter were questions that they would refer to librarians; the trainers deemed the game to be a success.

The session concluded with a discussion of the LibAnalytics Reference Module. The trainers stressed the need for accuracy with the READ Scale rating. They also emphasized the importance of the students entering detailed and accurate questions and answers into the LibAnalytics Reference Module. Students were also told that they should indicate in LibAnalytics when they refer a question to a librarian and to include all of the information regarding the transaction to the point of referral. Based on assistant engagement and informal feedback from both students and departmental staff, the training was successful. While the department found the training useful, many felt
the READ Scale training should come earlier in the year than the end of the fall semester.

**ASSESSMENT**

In 2012–2013, assessment was gathered through anecdotal evidence, internal secret shopping to measure referral rates, and informal focus groups. This helped the authors determine if the training was heading in the right direction. While this feedback was supportive, this year lacked quantitative data to inform decisions.

In 2013–2014, assessment changes were implemented. Librarians created post-training quizzes for each group training and asked students to complete the quizzes while at work. For the READ Scale training, the students received a list of sample reference questions as their quiz and were asked to rate the questions according to the READ Scale. This was the same exercise used in class during the 2012–2013 year (see Figure 1). The instructor identified four objectives for the quiz. Students should be able to correctly rate where questions fall on the READ Scale, correctly identify transaction type (one of the fields in LibAnalytics), ascertain when there was not enough information in the transaction text to correctly determine transaction type or READ Scale rating, and lastly the quiz provided reinforcement of the correct format for indicating a referral.

The trainers encountered a couple of issues with the quiz that prevented it from being an effective assessment tool. The first issue was that at least half of the students did not turn the quiz in by the pre-Thanksgiving deadline. As final exams came upon the heels of the students’ return to campus, the trainers decided not to require the students to complete it before they left for winter break. These students completed it during the beginning of the spring semester, which meant that there was a significant delay after training. Students also received feedback at the beginning of the spring semester on questions and answers they submitted in LibAnalytics, prior to taking the quiz, and were influenced by those results, which may have influenced their responses to the quiz. The third problem was that some of the students were perplexed by the quiz instructions and inaccurately filled it out. It became clear that the instructions needed an overhaul, but the structure of the quiz was sound. The instructors plan to keep the quiz but tweak it based on the lessons learned for 2014–2015.

**LIBANALYTICS READ SCALE EVALUATION**

Academic year 2013–2014 also incorporated formalized assessment of the student assistants’ READ Scale identifications via LibAnalytics, adapted from the assessment strategy instituted by Ackermann (2011) to provide departmental consensus on READ Scale assignations. We employed this method
under general usability testing guidelines to see if this was a useful part of the training process. This assessment examined both whether students applied the READ Scale correctly to questions they answered at the desk, whether they referred more difficult questions to librarians, and whether they provided enough detail in the information they included in LibAnalytics.

Two librarians evaluated a sample size of a minimum of 10 questions from each student assistant that were entered into LibAnalytics before the READ Scale group training session, and a minimum of 10 questions entered after the training. The before and after results showed no statistical significance but reinforced to the department the importance of reviewing the student assistants’ answers. Several overall trends identified included that student assistants were successful at identifying the READ Scale ratings for the questions they answered, as most of their scoring was in line with the librarians’ views. Several librarians who had expressed skepticism about the referral model had some of their doubts assuaged by this data. In a few cases, however, student assistants underestimated the rating of several pre-training questions, and post-training question ratings were slightly inflated. Some of the student assistants did not fill in enough detail on their answers so that librarians could evaluate for either READ Scale rating or whether or not the question was referred to a librarian.

Based on the answers listed, there were some cases in which librarians would have liked to see a referral happen, even for some READ Scale 3 questions, but the student assistant chose not to refer. There were also several student assistants inaccurately filling out transaction types, misidentifying reference questions as directional or equipment/technology-related.

During winter break of 2013–2014, our librarians evaluated the post-training answers and created reports on the results so that each student assistant received feedback on their entries into LibAnalytics. Each librarian chose five questions to provide feedback on with comments ranging from a “kudos” to an “exceptional critique,” an indication that a question should have been referred along with instruction of how a question could have better been answered, or indications when more detail or accuracy was required. The student assistants were invited to discuss these reports with the librarians.

The student assistants responded positively to these reports and the librarians opened dialogs with them as they asked questions based on those reports. Some of the student assistants indicated during the focus groups that they viewed the reports as evaluations of their work and found the input valuable.

CONCLUSIONS

As each academic year presented its own challenges, the Reference Services Department relied on flexibility and adaptation. The biggest difficulties encountered hinged on scheduling group trainings for all student assistants
and creating a working model for the timing of the elements of the training and assessment process. Unsurprisingly, both the student assistants and librarians agreed that READ Scale training is best early in the fall semester. This, as well as the other group trainings, are much more successful earlier in the year. However, due to illness, scheduling conflicts, and other unforeseen obstacles, putting these together early can be difficult. Avenues outside of group trainings exist, including the aforementioned checklist, as well as a new mentorship initiative in which librarians are paired with assistants and meet monthly to discuss more in-depth issues. The reference team requires more consensus in discussing the READ Scale with student assistants in both the mentor relationships and the checklist, to ensure that all student assistants have the same information. Another avenue may be training in an online environment, something that one of the authors, Vassady, piloted in 2013–2014. However, the student assistants enjoyed the opportunity to bond and discuss their experiences at the Research Help Desk in person and seemed lukewarm to an online alternative. This may be a solution for the one or two assistants who cannot attend a group training, so that the department does not have to wait so long to schedule training.

Another issue to be addressed is acknowledging the different skill levels of our student assistants. The authors are examining the possibilities of a more customized training schedule for returning student assistants and graduate assistants so that they have opportunities to use more advanced skills, using the READ Scale as a guide and not a hindrance. More assessment this year will help the department determine if this is a viable route, especially with added attention to lining up assessment techniques with the training schedule.

Fortunately, the process of training continues to be refined every year, with more efficient group training activities, more departmental buy-in for training and assessment processes, and more points of contact for assistants that discuss the valuable concepts of the READ Scale and referrals. Each of these points, including librarian mentors, improved checklists, pedagogically sound trainings, and assessments work together to ensure that student assistants have the skills they need to staff an excellent front-line service point and give the Reference Services Department the confidence to trust that the student assistants will refer more difficult questions to librarians.

REFERENCES


Testing the Viability of the READ Scale (Reference Effort Assessment Data)©: Qualitative Statistics for Academic Reference Services

Bella Karr Gerlich and G. Lynn Berard

The READ Scale (Reference Effort Assessment Data) is a six-point scale tool for recording qualitative statistics by placing an emphasis on recording effort, knowledge, skills, and teaching used by staff during a reference transaction. Institutional research grants enabled the authors to conduct a national study of the READ Scale at 14 diverse academic libraries in spring of 2007 and test its viability as a tool for recording reference statistics. The study data were collected from 170 individuals and 24 service points with over 22,000 transactions analyzed. There was a 52 percent return rate of an online survey of participants, with more than 80 percent of respondents indicating they would recommend or adopt the Scale for recording reference transactions. The authors suggest that the READ Scale has the potential to transform how reference statistics are gathered, interpreted, and valued. This paper presents the findings of a nationwide study testing the Scale in spring 2007 and suggests practical approaches for using READ Scale data.

Reference transactions are on the decline, as documented by librarians and their institutions, yet reference activities taking place beyond traditional service desks are on the rise. Librarians are reporting that they are as busy as they have ever been. According to an Association of Research Libraries (ARL) 2002 study conducted to reveal best practices in reference work, the findings exposed a general lack of confidence in current data collection techniques as “failing to capture and accurately reflect reference activities overall.”

What factors account for this change in reference work? Technology has transformed our ability as information providers to serve our user communities, structure our facilities, and conduct...
our work. The introduction of online information resources has heightened the need for instruction in the classroom, as well as instruction via e-mail, over chat services, and at point of use. Reference librarians are being sought out for their knowledge management expertise and subject specialization at the reference desk as well as increasingly in their offices and hallways. Counting traffic numbers at the traditional reference desk is no longer sufficient as a measurement that reflects the effort, skill, and knowledge associated with this work.

**FIGURE 1**

**READ Scale—Reference Effort Assessment Data Scale©**

<table>
<thead>
<tr>
<th>Category</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1:</td>
<td>Answers that require the least amount of effort and no specialized knowledge skills or expertise. Typically, answers can be given with no consultation of resources. Length of time needed to answer these questions would be less than 5 minutes. Examples: directional inquiries, library or service hours, service point locations, rudimentary machine assistance (locating or using copiers, how to print a document or supplying paper).</td>
</tr>
<tr>
<td>2:</td>
<td>Answers given that require more effort than the first category but require only minimal specific knowledge skills or expertise. Answers may need nominal resource consultation. Examples: call number inquiries, item location, minor machine and computer equipment assistance, general library or policy information (how to save to a disk or e-mail records, launching programs or rebooting).</td>
</tr>
<tr>
<td>3:</td>
<td>Answers in this category require some effort and time. Consultation of ready reference resource materials is needed; minimal instruction of the user may be required. Reference knowledge and skills come into play. Examples: answers that require specific reference resources (encyclopedias or databases); basic instruction on searching the online catalog; direction to relevant subject databases; introduction to Web searching for a certain item; how to scan and save images; more complex technical problems (assistance with remote use).</td>
</tr>
<tr>
<td>4:</td>
<td>In this category, answers or research requests require the consultation of multiple resources. Subject specialists may need to be consulted and more thorough instruction and assistance occurs. Reference knowledge and skills needed. Efforts can be more supportive in nature for the user or, if searching for a finite answer, difficult to find. Exchanges can be more instruction based as staffs teach users more in-depth research skills. Examples: instructing users how to use complex search techniques for the online catalog, databases, and the Web; how to cross-reference resources and track-related supporting materials; services outside of reference become utilized (ILL, Tech services, etc.), collegial consultation; assisting users in focusing or broadening searches (helping to redefine or clarify a topic).</td>
</tr>
<tr>
<td>5:</td>
<td>More substantial effort and time spent assisting with research and finding information. On the high end of the scale, subject specialists need to be consulted. Consultation appointments with individuals might be scheduled. Efforts are cooperative in nature, between the user and librarian and/or working with colleagues. Multiple resources used. Research, reference knowledge and skills needed. Dialogue between the user and librarian may take on a “back and forth question” dimension. Examples: false leads, interdisciplinary consultations/research; question evolution; expanding searches/resources beyond those locally available; graduate research; difficult outreach problems (access issues that need to be investigated).</td>
</tr>
<tr>
<td>6:</td>
<td>The most effort and time expended. Inquiries or requests for information can’t be answered on the spot. At this level, staff may be providing in-depth research and services for specific needs of the clients. This category covers “special library” type research services. Primary (original documents) and secondary resource materials may be used. Examples: creating bibliographies and bibliographic education; in-depth faculty and Ph.D. student research; relaying specific answers and supplying supporting materials for publication, exhibits etc; working with outside vendors; collaboration and ongoing research.</td>
</tr>
</tbody>
</table>
Gerlich developed the READ Scale at Carnegie Mellon University as a proposed quantitative measurement method designed to capture all occurrences of reference activity.² The READ Scale (Reference Effort Assessment Data) is a six-point scale used for recording vital supplemental qualitative statistics gathered when reference librarians assist users with their inquiries or research-related activities by placing an emphasis on recording the skills, knowledge, techniques, and tools used by the librarian during a reference transaction (figure 1).

Institutional grants received in 2006 enabled the authors to expand the study beyond one institution to fifteen academic libraries in the spring of 2007 with the goal of testing the viability of the READ Scale as an adaptable tool for gathering qualitative statistical reference data on a national level.

Study Objective
Our objective was to test the viability of the READ Scale as an additional tool for gathering reference statistics. The READ Scale was launched at Carnegie Mellon University as a trial in the spring of 2003, followed by an academic year study in 2003–2004. The READ Scale emphasizes effort, skills used by staff at the time the reference transaction occurs. This method is especially appealing in a profession where the current industry standard for recording statistical data is a hash mark that records and recognizes quantity as opposed to quality.

Literature Review
A review of literature and studies on reference librarians, reference services, and reference statistics was used to inform and support the design of the READ Scale, as well as the contribution of qualitative study to librarianship. There are two distinct areas of study in reference assessment that directly influence our work: the measurement and evaluation of reference service and the means of recording reference transactions (both traditional and automated practices).

Measurement and Evaluation of Reference Service
Beyond efficacy; the exemplar librarian as a new approach to reference evaluation by Quinn (1994)³ takes an interesting approach as it suggests using qualitative methods of evaluating reference librarians by first asking “what makes a reference librarian great?” Quinn asserts his study implies that good reference behavior is learned and that cultural preparation is a must. The study also found that not one single factor made a librarian great: it is a combination of skills. Quinn’s article focuses on behavioral aspects of reference librarianship. This study will add to those findings by determining if participants’ using the READ Scale find that ranking and recording their efforts results in positive feelings as their effort, skills, and knowledge are being recognized during the reference transaction.

Quality Reference Service: A Preliminary Case Study, Stalker and Muffin (1996)⁴ studied the results of the WOREP (Wisconsin-Ohio Reference Evaluation Program) survey at Brandeis University, which demonstrated the highest level score to date of a general reference department using the WOREP , to determine to what extent the high quality of professional service was demonstrated, due to use of the WOREP model. This article found that allowing for sufficient time for the consulting role of reference librarians led to the high success rate when using the WOREP Model at Brandeis; other factors included contents and configuration of the reference area, and strong support for services by administration. The READ Scale likewise acknowledges the interactive nature of the reference transaction, the time element and records the service component.

Perspectives on Quality of Reference Service in an Academic Library: A Qualitative Study was a study done by Mendelsohn (1997)⁵ to explore the concept of quality as it applies to reference service. Four participants in humanities and social sciences areas were interviewed and perceptions of quality discussed. This paper supports earlier works that emphasize willingness
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to help, knowledge and skills, morale and
time as vital components in the quality of
the reference transaction from the librar-
ian point of view.

Work in Motion / Assessment at Rest: An Attitudinal Study of Academic Reference Librarians; A Case Study at Mid-Size University MSU A, written by Gerlich (2006) is a study that focuses solely on reference librarians and their attitudes about their work: what they value, how they perceive themselves, how they perceive others view them. This study supports the notion that reference, or the transaction interaction, is the primary function of the reference librarians' position and the highest valued task by both the reference librarians and administrators. The study also reveals a lack of assessment or reward for this work outside of the anecdotal, with librarians and administrators in agreement that current statistical data gathered for reference work is not adequate for recording effort, knowledge, and skill.

Testing Classification Systems for Reference Questions, Henry and Neville (2008) follows the University of South Florida, St. Petersburg study using Warner's classification system at the Nelson Poynter Memorial Library in comparison to Katz's traditional reference categories described in Introduction to Reference Work (directional, ready reference, specific search questions and research). The results of this study support the idea that the adoption of new measures for reference statistics seems warranted to be more exacting, relevant, and reflective of reference services. The conclusions also reached similar findings of the READ Scale that by recording actual effort means reexamining staffing of the reference desk as a service point.

The Recording of Reference Transactions

Usage-Based Staffing of the Reference Desk: A Statistical Approach, Dennison (1999) discussed the importance of staffing decisions for reference desks, and how measuring usage of service can inform those decisions. At Winona State University Library (WSU), Dennison reports on using direct measurement applications to reference statistics. WSU employed categories to record reference statistics and determine peak times for staffing the reference desk based on the category assigned to each transaction.

A New Classification for Reference Statistics by Warner (2001) describes a test of an alternative reference data-gathering model. The impetus for creating the classification model in Warner's case was borne out of need for training and triage at a new single point-of-service desk at Eastern Carolina University. Warner's study changed from a daily collection of data for the first three months to being randomly selected once a month. Warner's research and subsequent implementation of a classification system in this case lays a foundation for this study by introducing alternative methods for gathering statistics.

SPEC Kit 268, Reference Service Statistics & Assessment, Novotny (2002) paints a picture of changing reference services and stagnant assessment measures of the same in research libraries by surveying and documenting how ARL libraries were collecting and using reference service transactions data. This survey described in its executive summary the confusion and angst surrounding modern reference work as libraries scramble to collect data. There is no mention of improving reference quality, developing employees, or recognition of work effort—the study did not distinguish between a successful or unsatisfactory transaction. While it recognizes the use of electronic tools to gather data, there is a failure to recognize the librarian's use of electronic tools to distribute information in any sense outside the narrow confines of the "transaction" definition. This study was most useful for this work in that it painted a picture that the system of reference assessment in use by ARL libraries appears to be in flux.

Reference Use Statistics: Statistical Sampling Method Works (University of Tennessee at Chattanooga) by Murgai (2006) supports one of the findings of the Novotny study.
that librarians felt busier than ever helping
patrons, despite a decline in the number
of patrons served. Murgai suggested that
most reference librarians would like refer-
ence statistics to reflect all aspects of refer-
ence but would also like statistic recording
to be simple, while acknowledging that
reference service is anything but simple.
The University of Tennessee at Chattanoogo (UTC) reviewed other academic
libraries’ sampling methodologies and
employed sampling for a year to compare
to daily data gathering. The results of the
statistical analysis showed that the num-
bbers gathered for a set period of time are
very close to data gathered over a longer
period of time, supporting the results of
the 3-week period of data capture selected
for the READ Scale study. The limits of
the UTC study also support the need for
a tool like the READ Scale, noting that
the classifications for reference statistics
used in the UTC study did not capture
the types of questions, resources, off-desk
questions—measures that are used in the
READ Scale—were needed to get a com-
plete picture of reference services.

**Methodology**

**Timeline**
The preparation of this study occurred
in the summer and fall of 2006, with
participation commitments in place by
late November 2006. The Institutional Re-
view Board (IRB) approval and pre-study
exercises took place between December 1
and February 4.

Libraries were given the option of con-
ducting the study for the duration of their
spring semester, and or for the predeter-

<table>
<thead>
<tr>
<th>TABLE 1</th>
<th>READ Scale Participating Institutions</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Enrollment Less than 5,000–5 Institutions</strong></td>
<td><strong>Enrollment Greater than 5,000–4 Institutions</strong></td>
</tr>
<tr>
<td>Clarke College</td>
<td>Carnegie Mellon University</td>
</tr>
<tr>
<td>Clarke College Library</td>
<td>(1 Institution, 6 Service Points) Pittsburgh, PA</td>
</tr>
<tr>
<td>Dubuque, IA</td>
<td></td>
</tr>
<tr>
<td>Eastern Virginia Medical School</td>
<td>Georgia College &amp; State University</td>
</tr>
<tr>
<td>Edward E. Brickell Medical Sciences Library</td>
<td>Library &amp; Instructional Technology Center</td>
</tr>
<tr>
<td>Norfolk, VA</td>
<td>(1 Institution, 2 Service Points) Milledgeville, GA</td>
</tr>
<tr>
<td>Lawrence University</td>
<td>Robert Morris University</td>
</tr>
<tr>
<td>Seeley G. Mudd Library</td>
<td>(1 Institution, 2 Service Points)</td>
</tr>
<tr>
<td>Appleton, WI</td>
<td>Moon Township, PA</td>
</tr>
<tr>
<td>Lewis &amp; Clark College</td>
<td>Washburn University Mabee Library</td>
</tr>
<tr>
<td>Aubrey R. Watzek Library</td>
<td>Topeka, KS</td>
</tr>
<tr>
<td>Portland, OR</td>
<td></td>
</tr>
<tr>
<td>Our Lady of the Lake University San Antonio (OLLUSA)</td>
<td></td>
</tr>
<tr>
<td>Sueltenfuss Library San Antonio, TX</td>
<td></td>
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<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>
mined three-week duration: February 4–February 24, 2007. These two options were selected to accommodate those institutions that normally only sample reference statistics as well as those that collect data daily for an entire semester. All institutions had to commit to the February data collection period. These three weeks were selected to limit the chance for spring breaks to occur within the study time frame.

**Study Participants**

The research team decided on the following parameters for seeking participants in the study. The universities must:

- Number between 9 and 15 academic libraries
- Be diverse geographically
- Contain diverse enrollment figures, grouped as follows: ≤5,000, >5,000 and ≤10,000, and ≥10,000
- Include both public and private institutions

The number range 9–15 was determined with a minimum acceptance rate of 9 participating, with at least three for each enrollment figure represented. One institution that initially agreed to participate had to withdraw for reasons unique to that university, leaving the number of participants at 14 institutions, with 170 individual participants total. See table 1 for participating libraries. Each institution was asked to identify an onsite coordinator at each location who would commit to disseminating information and managing the activities, timelines and follow-up associated with conducting the study.

**Pre-Study Calibration of Sample Scale Questions**

To familiarize and prepare participating librarians with the READ Scale and its proper use, a list of pre-study test questions was developed and sent to onsite coordinators. Each site received the same set of questions; however, the coordinators were instructed to select some questions from the list but were given the flexibility to substitute others for those localized to the institution. The addition of a sample question(s) that occurs frequently at the home institution reference desk provided a common ground for a discussion of how to apply the scale when rating the effort level of the transaction. The least number of questions distributed was six, and we asked that a range of project effort be represented (1–6 levels on the READ Scale) to acquaint participants with the full range of scale levels. All participants were asked to answer and rank their effort for each of the sample questions. It was agreed that onsite coordinators would evaluate responses and respond to participants’ questions regarding all aspects of applying the scale. Participants were also asked to record time during this exercise so that the researchers could average the length of time per transaction, per scale rank overall. Table 2 represents those questions from the researchers’ test list along with the average time it took to complete the transaction.

Across the board, the pre-study rating effort for transactions at the 1, 2, or 6 level were typically unanimous, while the 3, 4, and 5 ratings revealed some differences between individuals’ perceived rankings. Differing of individual rankings for the same type of reference transaction was thought to be due in part to subject specialization and how individuals tend to “grade” (hard or easy). Coordinators met with their participants and summed up how the transactions were resolved, the recommended rating to assign, the time it took to answer the question, and the reason for the rating. This enabled individuals to adjust their personal grading habits for traditional inquiries. It was important to recognize that where subject specialization is the norm, effort associated with customer service should be recognized. This is why the number of elements (the definition for each number on the scale) and time associated with the scale rankings are important to note. Staff helping someone out of their area of expertise should feel comfortable assigning a higher scale point than the librarian with a specialization in the subject area. As noted later in this paper, the criteria of time and
how it is applied using the READ Scale is an area considered for further research. Additionally, reference librarians were asked to conduct the study in their offices during “off-desk” times. The term “off-desk” is used to note reference transactions handled by a reference professional that occurs away from an established, regularly

<table>
<thead>
<tr>
<th>TABLE 2</th>
<th>Common Test Questions</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Common Question, Academic Libraries</strong></td>
<td><strong>Most Common Ranks &amp; Average Time</strong></td>
</tr>
<tr>
<td>I need a translation for an Italian aria.</td>
<td>3, 7 min</td>
</tr>
<tr>
<td>Where is the bathroom?</td>
<td>1, 1 min</td>
</tr>
<tr>
<td>I have a laptop—where I print out library records?</td>
<td>2, 1 min</td>
</tr>
<tr>
<td>I am researching postwar suburban housing development in the (City) region—can you show me what you have in that relates to this topic, or where I should look?</td>
<td>5–6, 90 min</td>
</tr>
<tr>
<td>I need the issue number for this citation: Le Goff, Jacques Ordres mendiants et urbanisation dans la France Annales: <em>economies, soci</em>t*s, civilisations, vol. 25, (1970)</td>
<td>4, 15 min</td>
</tr>
<tr>
<td>I am trying to place a hold on a book in process by using the online catalog request form. Kept receiving error message requesting item info—please help!</td>
<td>2, 5 min</td>
</tr>
<tr>
<td>I’m trying to find out about the philosophy of St. Benedict. Do you have any suggestions on which of his books or writing I can download?</td>
<td>4, 15 min</td>
</tr>
<tr>
<td>I need to find some contemporary criticisms for the play Fences by August Wilson—both the writing of the play and a production.</td>
<td>4, 12 min</td>
</tr>
<tr>
<td>I am looking for some help getting started on a research project—gender roles and the selection of college majors in the south—where do I start? How do I conduct a study?</td>
<td>5, 23 min</td>
</tr>
<tr>
<td>Do you have a book with pictures of kitchen utensils used in colonial times?</td>
<td>4, 28 min</td>
</tr>
<tr>
<td>PsycInfo says that we have this journal, but it isn’t in the library—please help!</td>
<td>2–3, 5 min</td>
</tr>
</tbody>
</table>

**Common Questions, Academic Medical Libraries**

| Curriculum models for teaching medical students about medical ethics: (1) What should be the learning objectives; 2). What the curriculum content should entail. | 5–6, 90 min |
| Need recent (up to 10 years) clinically relevant articles on the patient care of thrombolytic therapy and antiplatelet therapy and anticoagulation in the treatment of peripheral vascular disease | 3–4, 15 min |
| I need a list of drugs that affect lymph flow or lymph vessel contractions. | 3–4, 15 min |
| I’m looking for medical licensure lookup, medical school etc and if there are any malpractice proceedings against Dr. _____—can you help? | 3, 10 min |
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scheduled reference desk. Anecdotal evidence suggests that this is where the majority of higher-level scale effort in assisting patrons is being conducted, especially for those clients served by a liaison librarian with subject-specific responsibilities. These data were gathered and compiled to help determine at which service point users sought assistance; it was theorized that transactions at the 4, 5, and 6 levels would be recorded by individuals while working from their offices rather than at a traditional service point. The recording of “off-desk” statistics is a nontraditional activity and one not often employed by reference librarians or reported institutionally. It is the case then that this valuable effort has not been seriously studied or credited to the work effort of reference professionals.

The READ Scale data recording method is such that it allows institutions to use their local paper or online form that captures day, hour, and approach type for both directional and reference questions, on and off desk. Participants in the study were asked specifically to use their existing forms to test the adaptability or translation of the READ Scale in using a number from the scale in place of a hash mark when recording a reference transaction. On the researchers’ end, there was little difficulty in recording data onto the statistics spreadsheets, and the benefit for participating institutions was the ease of adoption of the scale into existing local recording instruments.

Data Collection

As all of the institutions had different methodologies in place for recording statistics, researchers developed a common table to compile data by Scale number and approach type (table 3).

Some institutions had numerous categories that identified inquiry types, such as “equipment” or “database search.” These were placed into the “Walk-Up Reference” category for the study. READ Scale definitions do not distinguish the kind of question, but they reflect the effort expanded, knowledge required, and even the teachable moment that occurs during the transaction.

The time of day that the transaction occurred was not reported cumulatively by the researchers, as reference desk hours and personnel schedules varied by institution and could not be normalized. They were recorded for each individual institution as reported and made available to the respective organization so that assessments could be made locally.

The approach type for transactions was recorded to establish frequencies for how transactions occurred. As suggested by the ARL study, some academic institutions are experiencing a decline in reference transactions. Recording approach frequency here would help determine the most popular method for seeking reference help and where that transaction occurred.

At the conclusion of the three-week data collection period, an online question-

<table>
<thead>
<tr>
<th>SCALE</th>
<th>1</th>
<th>2</th>
<th>3</th>
<th>4</th>
<th>5</th>
<th>6</th>
</tr>
</thead>
<tbody>
<tr>
<td>Walk-Up Directional</td>
<td></td>
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<td></td>
<td></td>
</tr>
<tr>
<td>Walk-Up Reference</td>
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<tr>
<td>Phone Directional</td>
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<tr>
<td>Phone Reference</td>
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<tr>
<td>Chat</td>
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<td>E-mail</td>
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<th>Walk-Up Ref</th>
<th>Phone Dir</th>
<th>Phone Ref</th>
<th>E-mail</th>
</tr>
</thead>
<tbody>
<tr>
<td>SCALE</td>
<td>1</td>
<td>2</td>
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<td>4</td>
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</tr>
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<td>Walk-Up Reference</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Phone Directional</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Phone Reference</td>
<td></td>
<td></td>
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<td></td>
<td></td>
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<tr>
<td>Chat</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>E-mail</td>
<td></td>
<td></td>
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<td></td>
</tr>
</tbody>
</table>
naire was sent to all study participants. The survey was designed to assess the participants’ experience when applying the scale, to gain their feedback on the value of the scale in demonstrating effort when recording reference transactions via this method, and to inquire how the scale might be changed to improve the data collection instrument. While the researchers’ individual institutional experiences with the scale were very positive, one desired outcome for conducting a national study was to determine the viability of the 1–6 point Scale.

**Results**

**Three-Week Study**

Fourteen institutions participated in the READ Scale Study during the spring semester of 2007. There were a total of 24 service points and 170 individual participants. All institutions submitted statistics using the READ Scale for the same three-week time period, February 4–February 24, 2007. Seven institutions elected to continue using the Scale for the duration of their respective semester after the initial study period. Table 4 illustrates the cumulative number of transactions, READ Scale category assignment, question and approach type for all service points, and institutions for a total of 8,439 transactions during the three-week study period. All institutions were encouraged to use the READ Scale for recording off-desk statistics as well, if appropriate. Seventeen out of a possible 170 individuals reported off-desk statistics for a total of 1,531 off-desk transactions recorded in the three-week period (table 5). Combined transactions for service points and off-desk totaled 9,970.

The study illustrated that the majority of inquiries continue to be by physical approach (figure 2). “Off-desk” the percentage of e-mail is considerably higher (figure 3) and almost equal in percentage to in-person interactions.

Comparisons between service points illustrate that the highest majority of

<table>
<thead>
<tr>
<th>TABLE 4</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Cumulative Data, All Service Points, All Institutions, 2/4–2/24/07</strong></td>
</tr>
<tr>
<td>READ SCALE</td>
</tr>
<tr>
<td>Walk-Up Directional</td>
</tr>
<tr>
<td>Walk-Up Reference</td>
</tr>
<tr>
<td>Phone Directional</td>
</tr>
<tr>
<td>Phone Reference</td>
</tr>
<tr>
<td>E-mail</td>
</tr>
<tr>
<td>Chat</td>
</tr>
<tr>
<td>Totals</td>
</tr>
<tr>
<td>Total</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>TABLE 5</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Cumulative Data, Off-Desk, All Institutions, 2/4–2/24/07</strong></td>
</tr>
<tr>
<td>READ SCALE</td>
</tr>
<tr>
<td>Walk-Up Directional</td>
</tr>
<tr>
<td>Walk-Up Reference</td>
</tr>
<tr>
<td>Phone Directional</td>
</tr>
<tr>
<td>Phone Reference</td>
</tr>
<tr>
<td>E-mail</td>
</tr>
<tr>
<td>Totals</td>
</tr>
<tr>
<td>Total</td>
</tr>
</tbody>
</table>
transactions that occur at the reference desks are in the READ Scale number-one category (figure 4), followed by number category two revealing that most inquiries at the public service point require the least amount of effort, knowledge, and skills of library personnel.

Off-desk comparisons show a different but consistent pattern (figure 5): that the percentage of questions answered off-desk for most of the institutions require a much higher level of effort, knowledge, and skills from reference personnel than at the public service point. Only three of the seventeen off-desk comparators in figure 5 have more level READ Scale categories representing the bulk of their transactions off-desk, with only two of those recorded in the higher than 40 percent range, overall. The majority of the off-desk ratings for the remaining group were at category two, three, and four respectively, suggesting that users actively seek out the expertise of particular reference staff.

These data further support the researchers’ theory that most of the higher-level effort, knowledge, and skill required of reference personnel will take place away from the public service point. The need to increase efforts to record off-desk reference statistics was also expressed by the many of the respondents in the ARL Study.12

Semester-Long Study

Seven of the institutions elected to continue to use the READ Scale for the duration of their respective semesters. Figures that follow represent fourteen service points and ninety-four individual participants. There were a total of 15,194 transactions recorded (table 6). Data was collected through May 11 and includes three-week study figures reported previously. Approach type for this group was also recorded (figure 6).

All institutions were encouraged to continue to use the READ Scale for recording off-desk statistics as well, if appropriate. Seven institutions, eight service points, and a possible 66 individuals reported off-desk statistics, for a total of 1,156 transactions recorded for the duration of their respective semesters (table 7). Data includes three-week study figures

![FIGURE 2](image2).

![FIGURE 3](image3)
FIGURE 4
Comparative Illustration of the Percentage of Each READ Scale Category, per Service Point

FIGURE 5
Comparative Illustration of the Percentage of Each READ Scale Category, Off-Desk
Testing the Viability of the READ Scale

reported previously. Approach type for transactions that occurred off-desk was also recorded (figure 7).

As with the three-week study period, the semester-long group's data compilation showed that the preferred approach type was “in person” overall. However, when separated out, the use of e-mail as an approach type came very close comparatively to that of in-person approach type when a transaction took place off-desk.

Comparative illustrations coincide with the three-week dataset; the majority of the transactions that occur are at category 1 of the READ Scale at service points for all institutions (figure 8).

Off-desk comparisons again show a different but consistent pattern (figure 9). The percentage of questions answered off-desk for the semester-long group participants required a much higher level of effort, knowledge, and skills from reference personnel than at the public service point. Unlike the three-week study, however, no scale category level 1 exceeded the 40 percent mark, and two of the off-desk institutions recorded no level 1 transactions at all. The semester-long off-desk group also

<table>
<thead>
<tr>
<th>READ SCALE</th>
<th>1</th>
<th>2</th>
<th>3</th>
<th>4</th>
<th>5</th>
<th>6</th>
</tr>
</thead>
<tbody>
<tr>
<td>Walk-Up Directional</td>
<td>3,787</td>
<td>899</td>
<td>56</td>
<td>6</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Walk-Up Reference</td>
<td>2,203</td>
<td>2,606</td>
<td>1,784</td>
<td>501</td>
<td>153</td>
<td>29</td>
</tr>
<tr>
<td>Phone Directional</td>
<td>377</td>
<td>148</td>
<td>10</td>
<td>4</td>
<td>1</td>
<td>0</td>
</tr>
<tr>
<td>Phone Reference</td>
<td>375</td>
<td>358</td>
<td>231</td>
<td>40</td>
<td>22</td>
<td>3</td>
</tr>
<tr>
<td>E-mail</td>
<td>465</td>
<td>423</td>
<td>238</td>
<td>85</td>
<td>69</td>
<td>4</td>
</tr>
<tr>
<td>Chat</td>
<td>19</td>
<td>76</td>
<td>150</td>
<td>66</td>
<td>6</td>
<td>0</td>
</tr>
<tr>
<td>Totals</td>
<td>7,226</td>
<td>4,510</td>
<td>2,469</td>
<td>702</td>
<td>251</td>
<td>36</td>
</tr>
<tr>
<td>Total</td>
<td>15,194</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>READ SCALE</th>
<th>1</th>
<th>2</th>
<th>3</th>
<th>4</th>
<th>5</th>
<th>6</th>
</tr>
</thead>
<tbody>
<tr>
<td>Walk-Up Directional</td>
<td>2</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Walk-Up Reference</td>
<td>89</td>
<td>134</td>
<td>153</td>
<td>87</td>
<td>51</td>
<td>28</td>
</tr>
<tr>
<td>Phone Directional</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Phone Reference</td>
<td>30</td>
<td>53</td>
<td>48</td>
<td>22</td>
<td>3</td>
<td>2</td>
</tr>
<tr>
<td>E-mail</td>
<td>43</td>
<td>95</td>
<td>181</td>
<td>105</td>
<td>24</td>
<td>3</td>
</tr>
<tr>
<td>Totals</td>
<td>164</td>
<td>283</td>
<td>383</td>
<td>215</td>
<td>78</td>
<td>33</td>
</tr>
<tr>
<td>Total</td>
<td>1,156</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
reported a higher percentage of level 3 category transactions than 2 with level 4, 5, and 6 following.

As stated earlier, these data support the researchers’ theory that most higher-level effort, knowledge, and skill required of reference personnel take place away from the public service point. Furthermore, increases in the percentages of READ Scale categories 3 and 4 off-desk data suggest that as the semester continues, there is a likelihood that the opportunity for off-desk transactions increases and the need for a level of expertise, knowledge, and skill likewise increases. This coincides with curriculum expectations that typically have fewer difficult assignments at the onset of a semester but demonstrate an increase in complicated assignments and prolonged research projects as the term progresses.

**Online Survey Results**

An anonymous survey was constructed to solicit feedback on the READ Scale that included its ease of use, participant difficulty distinguishing between...
FIGURE 9
Comparative Illustration of the Percentage of Each READ Scale Category, Off-Desk, Semester-Long Participants

TABLE 8
Degree of Difficulty
Question: Please Rank Your Degree Of Difficulty Using The Read Scale

<table>
<thead>
<tr>
<th>Responses</th>
<th>Not Difficult</th>
<th>Somewhat Difficult</th>
<th>Moderately Difficult</th>
<th>Difficult</th>
<th>Very Difficult</th>
<th>Skipped Question</th>
<th>Number Responded</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>52 (51.0%)</td>
<td>38 (37.3%)</td>
<td>10 (9.8%)</td>
<td>2 (2.0%)</td>
<td>0</td>
<td>0</td>
<td>102</td>
</tr>
</tbody>
</table>

TABLE 9
Application Ease / Question: Was the READ Scale Easy to Apply?

<table>
<thead>
<tr>
<th>Responses</th>
<th>Very Easy to Apply</th>
<th>Easy to Apply</th>
<th>Moderately Easy</th>
<th>Somewhat Easy</th>
<th>Not Easy</th>
<th>Skipped Question</th>
<th>Number Responded</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>16 (15.7%)</td>
<td>39 (38.2%)</td>
<td>38 (37.3%)</td>
<td>8 (7.8%)</td>
<td>1 (1.00%)</td>
<td>0</td>
<td>102</td>
</tr>
</tbody>
</table>

TABLE 10
Scale Adds Value to Statistic Gathering
Question: Please rank the level of perceived “added value” the READ Scale placed on statistics gathering for reference transactions.

<table>
<thead>
<tr>
<th>Responses</th>
<th>Extreme Value Added</th>
<th>High Value Added</th>
<th>Moderate Value Added</th>
<th>Minimal Value Added</th>
<th>No Value Added</th>
<th>Skipped Question</th>
<th>Number Responded</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>7 (6.9%)</td>
<td>46 (45.5%)</td>
<td>35 (34.7%)</td>
<td>9 (8.9%)</td>
<td>4 (4.0%)</td>
<td>1 (.99%)</td>
<td>101</td>
</tr>
</tbody>
</table>
All participants (170) were sent an online survey to complete. The response rate for the survey was high, with 102 (60%) total respondents. The questions and their responses are detailed in this paper.

The majority of participants had no difficulty using the READ Scale (table 8) and found the READ Scale easy or moderately easy to apply (table 9). When asked to rank perceptions of added value to statistical data gathering, the majority of responses fell in the “high-value added” category (table 10). The favorable response rate, with the majority of respondents in agreement that the READ Scale’s added value to reference statistics is “high” (45%) or “moderate” (35%), accounts for a total of 80 percent of the study group’s opinions.

Participants were asked about difficulties they may have experienced in deciding between categories. Most implied difficulty deciding between ranks 3 and 4; participants were also asked how they felt about evaluating their own efforts (table 11) with the majority responding that they were comfortable with the process.

As if by chance, the survey group would likely be in favor of having the Scale adopted in their library. A total of 50 percent responded affirmatively to “as is,” with another 30 percent who would adopt with modifications, bringing the favorable response rate to 80 percent.

The survey group was also given an opportunity later in the survey to suggest modifications, of which 24 deposited comments and two optional questions asked for specifics about what the study group liked and disliked about the READ Scale.

---

**TABLE 11**

**Difficulty Between Rankings**

**Question:** Did you have difficulty in deciding between ratings? If so check all that apply.

<table>
<thead>
<tr>
<th>READ Scale</th>
<th>1-2</th>
<th>2-3</th>
<th>3-4</th>
<th>4-5</th>
<th>5-6</th>
<th>No Difficulty</th>
<th>Response Count</th>
<th>Total Responses</th>
<th>Skipped Question</th>
</tr>
</thead>
<tbody>
<tr>
<td>Responses</td>
<td>12</td>
<td>32</td>
<td>46</td>
<td>31</td>
<td>15</td>
<td>21</td>
<td>157</td>
<td>99</td>
<td>3</td>
</tr>
</tbody>
</table>

(7.6%) (20.4%) (29.3%) (19.7%) (9.6%) (13.4%)

**Self-evaluation**

**Question:** How did you feel about evaluating your own efforts?

<table>
<thead>
<tr>
<th>Responses</th>
<th>Extremely Comfortable</th>
<th>Very Comfortable</th>
<th>Moderately Comfortable</th>
<th>Minimally Comfortable</th>
<th>Not Comfortable</th>
<th>Skipped Question</th>
<th>Number Responded</th>
</tr>
</thead>
<tbody>
<tr>
<td>Responses</td>
<td>12 (11.9%)</td>
<td>50 (49.5%)</td>
<td>35 (34.7%)</td>
<td>4 (4.0%)</td>
<td>0 (0%)</td>
<td>1 (.99%)</td>
<td>101</td>
</tr>
</tbody>
</table>

(7.6%) (20.4%) (29.3%) (19.7%) (9.6%) (13.4%)
The likes listed by the participants where coded into the six most common reoccurrences: Effort/Value; Approach to Evaluation; Types/Levels; Time; Staffing Levels; and Reporting to Administration:

Sample Comment, Effort/Value (17 occurrences noted):
It gave me a quick visible check of my recent efforts. This made my deskwork more rewarding, since I sometimes feel like I do so many 1s and 2s—but I could see that I was actually doing a higher level of reference than I realized. It added value to the statistics—literally.

Sample Comment, Approach to Evaluation (13 occurrences noted):
It qualifies what we were only quantifying and therefore is a more realistic indicator of what we do at the desk.

Sample Comment, Types/Levels (9 occurrences noted):
I like that it makes a qualitative distinction between types of reference interactions; it gives credit to more challenging transactions. The differences between the kinds of interactions are flattened in a typical “hash mark” approach to noting reference interactions.

Sample Comment, Time (5 occurrences noted):
I thought that it was a good way to see how the time was being spent on the question. It gives a better picture of what you are doing instead of just a tally mark for each question.

Sample Comment, Staffing Levels (6 occurrences noted):
Using the scale made me think about the types of questions we were receiving via the various formats and how we might need to change staffing patterns to better serve our users.

Dislikes were coded into the following categories: Difficult to Apply/Subjectivity; Types/Levels; Approach to Evaluating; Knowledge of the Staff; and Effort/Value.

Sample Comment, Apply/Subjectivity (19 occurrences noted):
My assessments were somewhat subjective. I’d like to have some sessions to compare notes with peers on how to apply the scale to practice questions to get some common understanding of how to use the scale.

Sample Comment, Types/Levels (16 occurrences noted):
The criterion for each level should have had more concrete benchmarks.

Sample Comment, Approach to Evaluating (9 occurrences noted):
It assumes that a question has an inherent difficulty factor. There is no taking into account the experience or inexperience of the librarian.

Sample Comment, Knowledge of the Staff (6 occurrences noted):
Being uncertain about how effective my rating was when dealing with questions far outside the realm of my normal subject areas—patent questions, etc. would be more complex for me but a piece of cake for our patents librarian. I wasn’t sure how to “figure in” that factor.

Sample Comment, Effort/Value (4 occurrences noted):
I also didn’t feel like it was clear how to assign a number on the scale when more time than expertise was involved with a reference interaction. The comments around difficulty be-
tween determining Scale levels reflects the outcome of an earlier question, which asked participants to indicate which, if any, categories they had trouble deciding between.

A follow-up question encouraged the participants to suggest alterations to the Scale for future modification. These modifications were put into the following categories: Delivery Method/READ Scale Appearance; Time Element; Skill Level Element; Clarity of Categories; Discussion Component; and Comments/ Observations:

Delivery method/READ Scale Appearance (9 occurrences):
Automate it! It would be great to have on the computer.

Time Element (5 occurrences):
Additionally, the numbers in the scale (1–6) may have more meaning and value if time were a factor—I’ve had “3” interactions that can last anywhere from 5 minutes to 20 minutes, but they are all simply marked “3.”

Clarity of Categories/more descriptive/fewer categories (4 occurrences):
The degrees of gradation of reference questions were important, but not very clear. I wish they had been more concrete… like a checklist for each category or more defined descriptions for each category. A revision will reduce the variable/error margin between scoring librarians…. The criterion for each level should have had more concrete benchmarks.

Skill Level Element/experience of reference staff (4 occurrences):
Though it added some context to reference statistics, it could stand a little more context. What may be a 3 or 4 level for someone with little or no experience (a graduate student assistant, for example) may be a 2 or 3 for someone with a great deal more experience. The scale may have more use if each person at the desk kept [his or her] own statistics, so that experience could be factored in.

Discussion Component/requirement (2 occurrences):
Reference staff should talk openly and often about how to apply question scale levels to make sure we are all on the same page. The descriptions are helpful—but everyone reads things differently. There are gray areas. There are things we all do differently—so I think open discussion would be helpful.

General Comments/Observations (2 occurrences):
The simple nature of the READ scale works to do two contrary things: point out the variability of the work that we do, while showing how limited we are in tracing the ways in which we make knowledge available to each and every patron on an individual level. Statistics, by nature, are too broad and contain not quite enough depth at the same time.

Finally, the study group was asked if their approach to reference changed in any noticeable way during the period they applied the READ Scale to measure their reference work.

The number of the overall participant study group that changed their approach to reference was low, only 10 out of a total 98 responses, but these responses are worth including here, as it provides a snapshot of the online survey participants’ range of experience. A small percentage of the participant group indicated difficulty with incorporating the READ Scale into existing reference procedures, while a high level of study respondents experienced more satisfaction, increased awareness, and an appreciation of the effort, knowledge, and skills involved with reference work by applying the
scale to aid in measuring their reference work effort.

I experienced an increased awareness of differing levels of reference work.

Frankly, it complicates the process. Trying to delineate between a 1 or a 2, a 3 or a 4, etc., is tedious.

I was more likely to think about the level of service being provided.

I gave more [conscious] thought to the processes or steps involved in order to rate each interaction.

I was more aware of the level of effort that could be applied to questions vs. what I actually did.

It made me keep statistics regularly.

More aware of time spent on transaction(s).

I think I worked a bit harder to make sure that I recorded everything.

I had to think about the level of effort.

I was more self-conscious of the level of help I was providing, with the net result that interactions improved. My level of empathy and understanding (dare I say “patience”) improved along with it.

**Using READ Scale Statistics: Practical Approaches**

The READ Scale was developed as a tool for capturing vital supplemental qualitative statistics when reference librarians assist users with their inquiries or research-related activities by placing an emphasis on recording the skills, knowledge, techniques, and tools used by the librarian during a reference transaction.

The researchers propose that there are a number of practical approaches to using the statistical data derived from the READ Scale for both strategic planning and the assessment of reference services. Individual institutions can use READ Scale statistics for staffing; training and continuing education; renewed personal and professional interest; outreach; and reports to administration.

**Staffing**

Comments from the study:

We’ve always known empirically that a large percentage of our reference transactions were quick and easy. This study provided concrete evidence of this, with possible staffing implications.

It shows a much clearer picture of what we are actually doing with reference. It is possible to see where the true “busiest times” are in the day.

By using the READ Scale, it is possible for libraries to alter staffing patterns to best serve the users and librarians. One institution involved in the study decided to “let go” of requiring full-time professional librarians to staff their reference desk in the mornings and on Saturdays after viewing the number of level 1 and 2 questions they received at those days and times. This empowers student workers and part-time staff, who took over some of the duties, and frees the professional librarians to concentrate on liaison and collection development duties. Another library in the study is using the data to propose reducing faculty librarian scheduled hours in the evening by ending them at 9 pm instead of 11 p.m., having noted that, after 9 p.m., transactions not only become infrequent but are rarely ranked above category 2 on the READ Scale. Prior to using the Scale, the evidence for changing schedules could only be described as anecdotal. By the same token, the opposite can be noted—high traffic times or notations
of higher categories of the READ Scale can be used to supplement and strengthen the value of reference desk staffing.

Training/Continuing Education

Comments from the study:

I felt it was very useful because it challenged me to come up higher in those areas where I need improvement in certain concentrations like history, which is not my specialty. I need to learn so much more.

Not directly related to the READ Scale itself, but based on the compilation of answers for the sample questions, we realized that not all our librarians were approaching questions in the same way. The ratings could vary from 2 to 6 for the same question. Based on that, we have decided to bolster our staff development and training program and improve our mentoring of new librarians.

The READ Scale can be used as a training tool for librarians at all levels. The second observation above is a great example of how using the READ Scale can assist in the training and mentoring of reference staff. Another service point also reported the same experience—they will also increase training. The researchers suggest that this training can be done throughout the semester or year using the READ Scale. If, at the beginning of the training period, scale effort levels recorded and the answers provided are not in line with each other, a training regimen with outcomes can be developed, and a similar series of questions can be tested at a later date to ensure that the staff is developing the necessary reference skills and knowledge.

As another study participant observed, using the READ Scale encourages continuous learning. The researchers suggest that reference staff could make the most of this opportunity by writing down any questions that elicit an assignment of a category of 4 or higher on the READ Scale at the reference desk and then sharing these questions and how they were answered with their colleagues, providing the opportunity to discuss strategies for assisting users, and learning from colleagues who have in-depth subject knowledge in that particular area. This could also be a great way of reconnecting with others, for the love of the job. Gerlich’s case study reveals that the number-one reason reference librarians chose their profession was to help people with research; the second reason was the aspect of “the detective work.”

Renewed Personal and Professional Interest

In Gerlich’s case study, reference staff and administrators acknowledged the primary function of their profession as that of providing reference service; likewise, they recognized that current data-gathering methodologies were not sufficient in recording the importance of this work or effort. The READ Scale provides a way of revealing and counting important supplemental data that have been hidden in the customary tick marks used to record reference statistics.

Comments from the study:

Using the READ Scale added to my sense of accomplishment!

The thought required to rank questions according to the READ scale made me think a little at the completion of the reference interaction—and thus to become more self-aware.

It gives ME a tangible scale on which to rate my efforts, ultimately spurring me to strive for better service.

By using the READ Scale, reference staff can rate their effort and receive acknowledgement for their effort, knowledge, and skills as appropriate. The level of skill is especially important to note in a situation where subject or liaison

...
practices are the norm and librarians are sought out for their expertise and consultation services. In-depth specialized transactions often happen away from the traditional service desk, and credit for expertise is often not recorded or acknowledged.

**Outreach**

Using the READ Scale can help develop outreach activities for librarians. In an instance where a liaison program is strong, but there is little visible research or library activity and low or no in-office consultations, this may be a sign that outreach efforts should be increased. This would be especially pertinent in an environment with research-intensive programs, where reference staff could expect to assist faculty or upper-class students who would be expected to have intensive assignments, to conduct research or need primary research materials. An active campaign or meeting with the department could elicit an increase in the types of interactions that would be assigned level 4 or higher on the READ Scale.

The same can be said for reference desk statistics in general. If libraries are only experiencing inquiries that require efforts at the 1 or 2 READ Scale categories, then how are students and faculty getting their information? Do they know what services and resources you have? Are there new ways to market services, facilities, or research assistance? Are there times of the year when higher READ Scale categories are showing up in the statistics, and, if so, can those patterns be predicted and assignments be noted to facilitate new research guides, make connections to teaching faculty, or influence new designs or products?

**Reporting/Statistics**

The READ Scale is intended to record supplemental statistics alongside the traditional quantitative data gathered that could be used by administrators to report the knowledge and skills used in reference services.

Comments from the study:

I liked that it attempts to record the intensity of the reference transaction. In my view that was a sorely missing piece of information when recording in the traditional fashion.

The READ Scale is an assessment tool that does a better job of reflecting how reference librarians spend their time. It gives more value than tick marks on a page. It’s a tool we can use with administrators to show what we really do.

Just as READ Scale statistics can help determine staffing strategies, the qualitative nature of the instrument can help with the creation of narrative text more descriptive in nature when developing reports to stakeholders, especially where an administrator needs to explain roles or job functions. This could be particularly meaningful in cases when off-desk statistics are recorded and reference librarians track communications, research assistance, and appointments with their constituents via e-mail. More time and effort are required for those activities but are rarely recorded.

The READ Scale could also be useful in estimating average time spent helping patrons. In the testing phase of the study, participants were asked to record the amount of time it took to complete a transaction. These data enabled the researchers to make rough estimations on the average length of time per transaction for each scale category.

Table 12 illustrates the total number of transactions per category and the estimated number of hours or days needed to complete a transaction, based on the pre-study question calibration data where participants recorded time expended to answer the test questions. These figures can only be used as an illustration of what keeping track of time can be used for, as these data were gathered from the test period and therefore do not take into
account “real time”—that is, time spent talking with a patron, the time involved in conducting teachable moments, the learning skill of the recipient, and so forth—times averaged for these transactions and efforts did not involve a “live” patron. A real transaction, with an interview and resulting conversation, dependent on the needs or communication skills of the user, in all likelihood would have taken longer. Adding a measure of the time expended to handle a transaction was also suggested by some participants in the modification section of the online survey. If a library were to keep track of the time expended for each transaction within a semester, then accurate data could be applied. This is especially useful in terms of real-time electronic services, such as Chat, where the back-and-forth communication takes on a different dynamic than an in-person communication:

At times, certain aspects of the scale indicating difficulty level seemed to conflict, particularly on [C]hat. For example, there were times when an answer was relatively easy—I knew it based on my knowledge—but because I was working via [C]hat, it required quite a bit of time to guide a user through the information session when I think less time might have been required for an in-person transaction.

<table>
<thead>
<tr>
<th>Average Time (in minutes)</th>
<th>1</th>
<th>5</th>
<th>7</th>
<th>15</th>
<th>90</th>
<th>90</th>
</tr>
</thead>
<tbody>
<tr>
<td>READ SCALE</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td>5</td>
<td>6</td>
</tr>
<tr>
<td>Service Points</td>
<td>9,497</td>
<td>5,622</td>
<td>3,085</td>
<td>926</td>
<td>303</td>
<td>68</td>
</tr>
<tr>
<td>Off-Desk</td>
<td>658</td>
<td>635</td>
<td>565</td>
<td>295</td>
<td>117</td>
<td>53</td>
</tr>
<tr>
<td>Totals</td>
<td>10,155</td>
<td>6,257</td>
<td>3,650</td>
<td>1,221</td>
<td>420</td>
<td>121</td>
</tr>
<tr>
<td>Hours</td>
<td>169</td>
<td>521</td>
<td>426</td>
<td>305</td>
<td>630</td>
<td>181</td>
</tr>
<tr>
<td>Days (24 hrs)</td>
<td>7</td>
<td>22</td>
<td>18</td>
<td>12</td>
<td>26</td>
<td>8</td>
</tr>
<tr>
<td>Days (8-hr day)</td>
<td>21</td>
<td>65</td>
<td>53</td>
<td>38</td>
<td>78</td>
<td>22</td>
</tr>
</tbody>
</table>

**Conclusion**

Reference staffs appear ready to try new methods for recording reference statistics that include qualifying their effort, knowledge, and skills. By continuing to gather data from institutions that try the READ Scale for reference services, the researchers can begin to amass a large body of statistics to normalize the Scale even more, with an aim to create a dialogue among professionals.

**Future Directions for Research**

The authors are invested in continuous improvement of the READ Scale and wish to thank our study participants as well as other libraries that have adopted the scale for use at their institutions and for continuing to share their data with us. We have benefitted from users who suggested modifications as well as from having the privilege of being engaged in constructive and fruitful discussions toward progress in improving the measurement of reference work. In our quest to share the READ Scale and to investigate its viability, several aspects of the scale have emerged as elements worth considering for future research.

The most popular inquiry to arise when discussing the READ Scale is the issue of the timing of each category (for instance: on average, how long does a scale 3 question take to answer?) The researchers have considered the element of “time” as a measurement category and
encourage adoptive institutions to build a timing element into their preparation and calibration training tools for librarians gearing up for using the READ Scale in their reference work. We have observed two dominant schools of thought on the proposal of using timing as a continuous measurement. One school favors the timing of each transaction to later be used as a performance measurement tool, a training tool for the calibration of level of effort when applying the READ Scale rankings, and for reporting workload effort to administrators. The opposing school of thought does not favor the use of “timing” as a measure of reference effort as it can vary widely due to the knowledge, experience, and personality of the librarian handling the transaction. The issue of the value of timing reference transactions bears future investigation.

Survey feedback teased out the question of how to take into account an individual librarian’s level of reference experience and expertise brought to the reference transaction and how to score for varying levels when “rating” a transaction using the READ Scale. The question of “level of experience and the rating of reference transactions” is an area that would benefit from future research. How does one build in expertise and knowledge that is unique to the librarian or staff member, their familiarity with the resources and policies of their institution, when using the READ Scale? More work remains to address this aspect of the application of the scale.

Determining the effectiveness of the READ Scale for recording reference statistics and applying assessment practices requires continued, long-term data collection from a variety of institutions. The researchers welcome any and all interested libraries to try the READ Scale and contribute to its ongoing development as a supplemental tool for qualifying reference statistics by participating in the ongoing research collaborative and sharing experiences with colleagues. For more information, go to http://www.dom.edu/library/READ/index.html.

Notes

13. Gerlich, Work in Motion/Assessment at Rest, 122.
14. Ibid.
15. Ibid.
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