Assessing Reference Services Using the READ Scale (Reference Effort Assessment Data)

Penny Coppernoll-Blach, Reference Coordinator; Dominique Turnbow, Undergraduate Services Librarian; Biomedical Library, University of California, San Diego

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Why adopt a new system?

- Biomedical Library was collecting 3 levels of statistics at our Single Service Desks (SSD)
  - Directional questions
  - Informational questions
  - Search questions

- We were not tracking the effort needed or expertise needed or time spent per question, just numbers

- Our overall reference stats were -9.5% comparing 2008/2009 to 2009/2010 (although E-reference was up +20%), so we needed better data
We have three work stations at our Single Service Desk

- **One Reference station**
  - staffed by 7 librarians and 2 library assistants
  - 9 AM – 4 PM, weekdays only

- **Two Circulation stations**
  - staffed by 8 library staff and several student employees
  - 8 AM – midnight, Monday – Thursday, with shorter hours on Friday, Saturday & Sunday
READ Scale (Reference Effort Assessment Data) was developed at Carnegie Mellon University & launched with a trial in Spring 2003.

Why? – Because their Reference statistics being collected were not adequate.

READ Scale incorporates:

- Effort
- Time dedicated to the transaction
- Knowledge skills used by the librarian or staff member
- **Level 1** – Directional, requires no specialized knowledge skills or expertise
  - What are the library hours?
  - Where are the printers/restrooms/scanners?

- **Level 2** – Informational, requires only minimal specific knowledge
  - Using the catalog to find call numbers, library policy information, troubleshooting printing problems
- **Level 3** – Minimal Instruction, answers require some effort and time, consultation of ready reference materials
  - Assistance with PubMed, ILL, how to search for a topic in the catalog
- **Level 4** – Search/ Some Instruction, requires the consultation of multiple resources, difficult to find answers
  - Complex search techniques, RefWorks, EndNote
- **Level 5** – Extensive Instruction, substantial time/effort spent, multiple resources
  - Graduate research, helping user modify their original research question
- **Level 6** – Very Extensive Instruction, may take 90 minutes or more
  - In-depth PhD or faculty research, in-depth bibliographic citation assistance
How did we implement READ?

- **Task Force is created with:**
  - 2 librarians
  - 2 Single Service Desk Supervisors
  - Information Commons Desk Supervisor

- **Training is initiated & a needs assessment survey is done**
  - Training includes role playing scenarios at All Staff Meeting in August 2010

- **Single Service Desk (SSD) Forms are revised**
  - Sample statistics are collected at SSD for first three weeks of September so that staff has a chance to practice.
  - Statistics are collected during the 12 weeks of **Fall Quarter** (9/19 – 12/10/10) and 11 weeks of **Winter Quarter** (1/3 – 3/19/11)
Forms used at the SSDs were revised and new ones created

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New Form Used at Ref Desk, with 6 READ Levels & Question Method Boxes
## Form Used to Record Levels 4-6 Questions

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**New Form Used to Record Level 4-6 Actual Questions Received at the SSD**
Total Questions at all levels = 10,551
No Level 6 Questions at all at SSDs!
94% of questions fell in levels 1 or 2
98.8% of questions fell in levels 1, 2 or 3
SSD Statistics by Level & by Day

Single Service Desk Statistics by Day

- Monday
- Tuesday
- Wednesday
- Thursday
- Friday
- Saturday
- Sunday

- Level 6
- Level 5
- Level 4
- Level 3
- Level 2
- Level 1
Question Method

- Walk up  - 84%
- Phone    - 14.4%
- IM       - 0.2%
- Email    - 1.4%

Includes all levels of questions received at SSD
Off-Desk Statistics - Librarians

Librarian Off-Desk Statistics by Method

- Level 1: 23 (E-mail (not QP), IM, Phone)
- Level 2: 16 (E-mail (not QP), IM, Phone)
- Level 3: 8 (E-mail (not QP), IM, Phone)
- Level 4: 1 (E-mail (not QP), IM, Phone)
- Level 5: 1 (E-mail (not QP), IM, Phone)
- Level 6: 1 (E-mail (not QP), IM, Phone)
Librarian Off-Desk Statistics by Day

- Monday: 29
- Tuesday: 7
- Wednesday: 8
- Thursday: 4
- Friday: 12

Number of Questions
(Three Level 6 Questions were answered via email off desk by an individual librarian, but the actual questions were not recorded.)
Next Steps

- Task Force Report has gone to our library administration team for review
- Fall & Winter Quarter statistics give us 2 quarters worth of data
- Budgetary issues may cause major changes within the UCSD Libraries (merging libraries and eliminating staff)
- SSD staffing changes are probable
Questions?

pblach@ucsd.edu