



EVALUATING REFERENCE SERVICES



INTRODUCTION



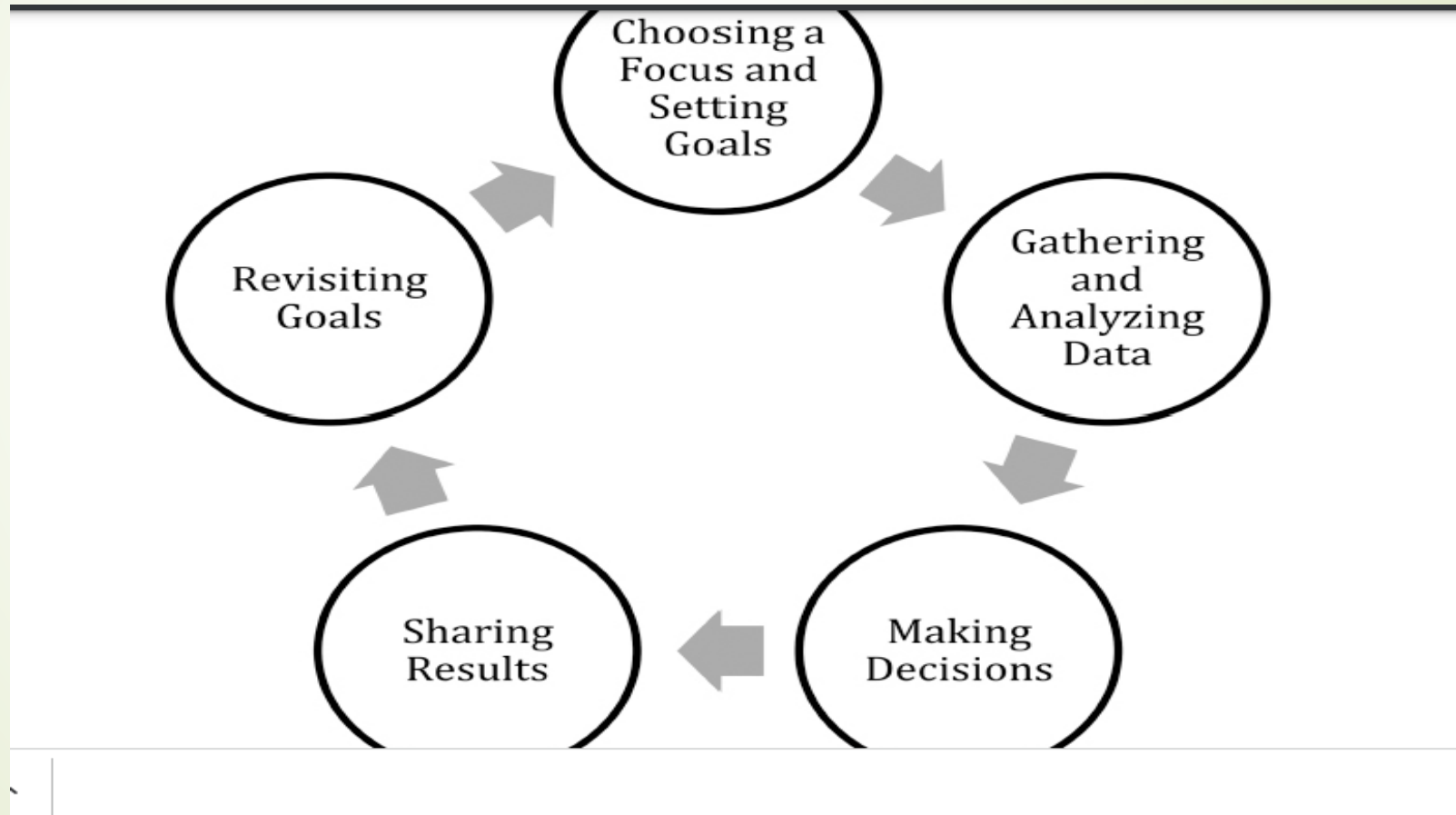
- ▶ To evaluate means to establish the value or worth of the service.
- ▶ Evaluation involves processes for gathering and analyzing data to measure things like quality of resources and services, customer satisfaction, or progress toward goals.
- ▶ **Evaluation** in this unit refers to the process of determining the quality of a library's collections or services or the level of patron satisfaction with those collections or services



INTRODUCTION

- ▶ Reference professionals provide a wide range of resources and services to support users' information needs, all of which should be evaluated.
- ▶ Evaluation seeks to establish
 - ❑ the effectiveness and quality of services and resources
 - ❑ satisfaction level of users
 - ❑ progress toward goals and
 - ❑ Demonstrate value to stakeholders

THE EVALUATION CYCLE





Choosing a Focus and Setting Goals

- ▶ The first step in any assessment project is to determine the goals and define which aspects of the service to study.
- ▶ For instance,
 - ❑ librarians might study levels of customer satisfaction with virtual reference services, with a goal to achieve a 90 percent satisfaction rate. Or
 - ❑ they could examine how accurate staff are when providing answers to questions or
 - ❑ whether students are learning from reference transactions.



Choosing a Focus and Setting Goals

- Each evaluation or assessment project has five distinct aspects that must be defined before the project is undertaken:
 1. what will be studied,
 2. who will be the focus of the study,
 3. where the study will take place,
 4. when the study will take place, and
 5. how the data will be gathered.



Gathering and Analyzing Data

- ▶ Once goals have been identified, data collection can begin.
- ▶ There are many different methods for collecting data
- ▶ The most important consideration when choosing a method of data collection is to consider what kinds of data are needed
 - ❑ for example, customer opinions and work flow processes—and then determine what method will yield that data.
 - ❑ surveys and focus groups are often good ways of getting feedback and opinions from users.

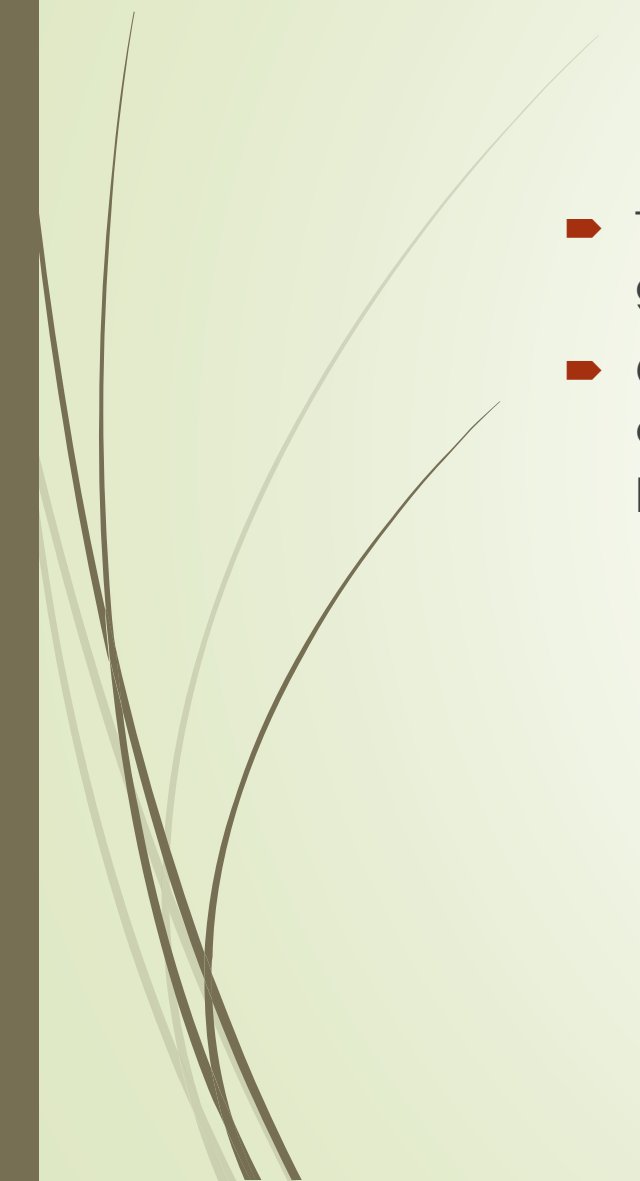


Gathering and Analyzing Data

- ▶ Once the data has been gathered, it must be analyzed.
- ▶ The method of analysis will depend on the type of data gathered.
 - ❑ For instance, quantitative data from surveys can be summarized using percentages and averages.
 - ❑ Qualitative data from focus group or interview transcripts, the text will need to be read for patterns and themes in the content.
- ▶ Most important, however, is determining the meaning behind the data.
- ▶ How closely do these results meet the goals that staff set for themselves?



Making Decisions

- ▶ The ultimate purpose of assessment research is to take action; simply gathering and analyzing data is not enough.
 - ▶ Once data has been gathered and analyzed, it should be used to make decisions, whether about staffing, budgeting, continuing or suspending programs, or setting new goals for improvement.
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Sharing Results



- ▶ Communicating the results of evaluation and assessment is an important part of evaluation
- ▶ Stakeholder groups, from patrons to trustees to local government agencies or college provosts and presidents, will be interested to know what was learned from the research and what will be done with that information.
- ▶ Sharing results with people who participated in the research is one way of letting them know that their feedback is being taken seriously and that their opinions matter



Revisiting Goals: Continuing the Cycle

- ▶ Once the results have been analyzed in order to determine how well the library is meeting goals, and decisions have been made about services based on the research, the cycle begins again
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WHAT TO ASSESS

- ▶ Every reference environment has three aspects that can and should be evaluated:
 1. Reference collection
 2. Reference staff
 3. Reference services



EVALUATION METHODS



- ▶ Evaluation research can be carried out through a wide variety of methods.
- ▶ Most methods fall into one of two basic categories: quantitative or qualitative.
- ▶ quantitative methods focus on information that can be represented numerically and might include frequency counts, percentages, and ratios.
 - ❑ methods for gathering quantitative measures include
 - ❑ surveys, questionnaires, or polls (with closed-ended questions); transaction log analysis (including reviews of analytics of website and resource use); and bibliometrics (including citation analysis).
- ▶ qualitative research relies on observation and description.
 - ❑ Some common types of qualitative research include interviews, focus groups, document analysis, and unobtrusive observation.



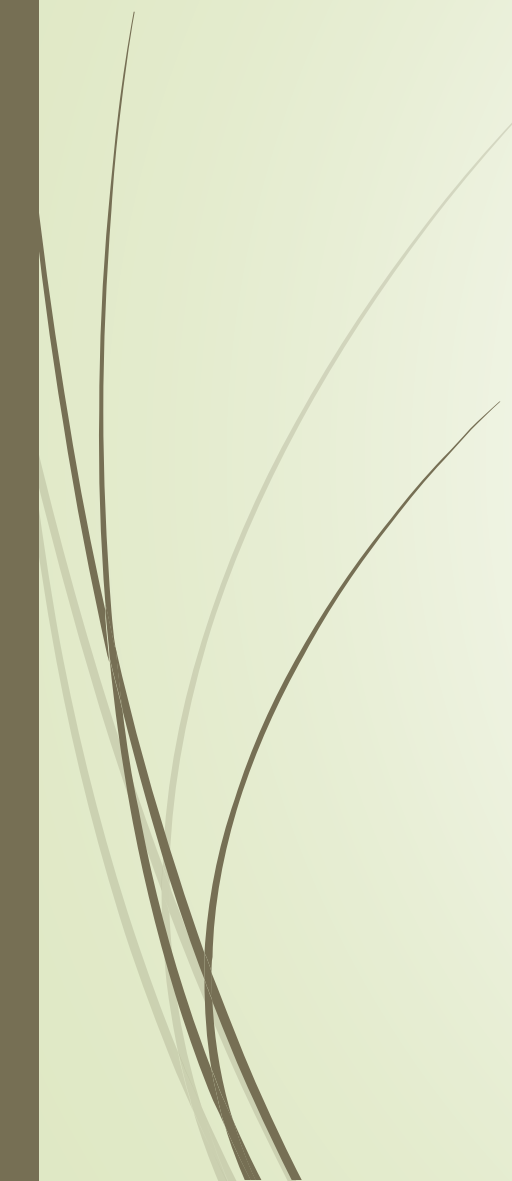
EVALUATION METHODS



- ▶ quantitative methods can often be applied to larger groups, - there is more likelihood of getting a representative sample whose results are generalizable to the larger population.
- ▶ qualitative methods can usually probe deeper and get at the context behind quantitative results.
 - For instance, while a survey might tell us that patrons are satisfied with reference services, a focus group could find out why people are more or less satisfied with different aspects and probe the reasons for satisfaction and dissatisfaction.
 - it can be advantageous to use quantitative and qualitative methods together to get a fuller picture of the area under research.



EVALUATION METHODS

1. Surveys
 2. Interviews
 3. Observations
 4. Focus groups
 5. Transcript Reviews
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SURVEYS



- ▶ A survey is a set of questions asked of a defined community in order to get a quantitative handle on community values, activities, qualities, or perceptions.
- ▶ Since the purpose of a survey is to tap into people's individual preferences, the method is most appropriate when personal information is required such as:
 - ❑ “Were YOU satisfied with the help you received today?” or
 - ❑ “Did YOU find the information you wanted?” or
 - ❑ “Do YOU think the reference room should be open on Sundays?”
- ▶ Surveys are also helpful when information is required about community characteristics and Demographic information



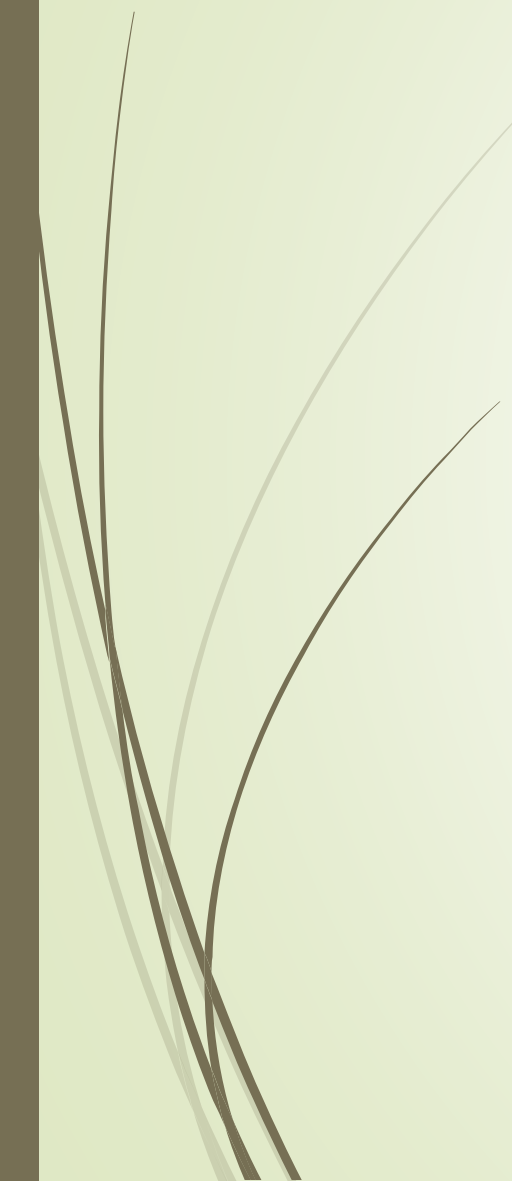
SURVEYS



- ▶ When composed of closed-ended questions, or questions with a fixed set of answers from which the participant must choose, they take less time to administer than qualitative methods and
- ▶ generally can be analyzed more quickly, making them a good choice for large populations.
- ▶ Surveys can elicit a range of information, including demographics, knowledge, opinions, and awareness.
- ▶ surveys can also include open-ended questions that allow participants to write in their own responses (add qualitative aspects to the study)
- ▶ Surveys are used regularly for customer-service feedback



SURVEYS

- ▶ Surveys have also been used to study patrons' information-seeking behaviors in order to better understand how to support their needs through reference services
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SURVEYS



- ▶ Age, education, ethnicity, and affluence are critical survey results that undergird the shaping of library collections
- ▶ **Survey formats**
 1. In-house surveys
 2. Telephone surveys
 3. Email/Mailed questionnaires
 4. Online surveys



SURVEYS

- ▶ online survey e.g
 - ❑ instant surveys that pop up at the end of each session
 - ❑ SurveyMonkey,
 - ❑ Google forms,
 - ❑ The LibQUAL+ survey (www.libqual.org) developed by the Association of Research Libraries is a handy tool for all kinds of survey assessments.
 - ❑ QuestionPro (www.questionpro.com) can be embedded in websites and social networks or used as a pop-up or an app for offline collection.



INTERVIEWS



- ▶ Surveys are often supplemented with another method of assessment, that is, the individual interview.
- ▶ Interviews are used either to help in the making of survey questions or to add depth to the quantitative survey.
- ▶ They are useful tools to collect personal experience and perception that can lead to meaningful assessment information.
- ▶ They can be conducted face-to-face or via telephone or e-mail or electronically using apps like Whatsapp, google meet, zoom, etc



Observations

- ▶ An observation is an act of recording what took place.
 - ❑ Did the reference librarian answer the question correctly?
 - ❑ Did the reference user approach the desk for assistance?
 - ❑ Are reference sources easily accessible to the user?
- ▶ A live transaction is recorded and evaluated in accordance with preset questions and expectations.
- ▶ The method is most applicable when actual behavior as opposed to values and perceptions is the required area of assessment.



Observations



- ▶ this method involves a systematic approach to observing reference librarians in action and comparing or benchmarking their actions and behaviors against a predetermined set of criteria.
- ▶ Observation can be either
 - ❑ obtrusive, meaning the subject of the study knows they are being observed though they may not know when it will happen, or
 - ❑ unobtrusive, meaning the subject does not know they are being observed or studied.



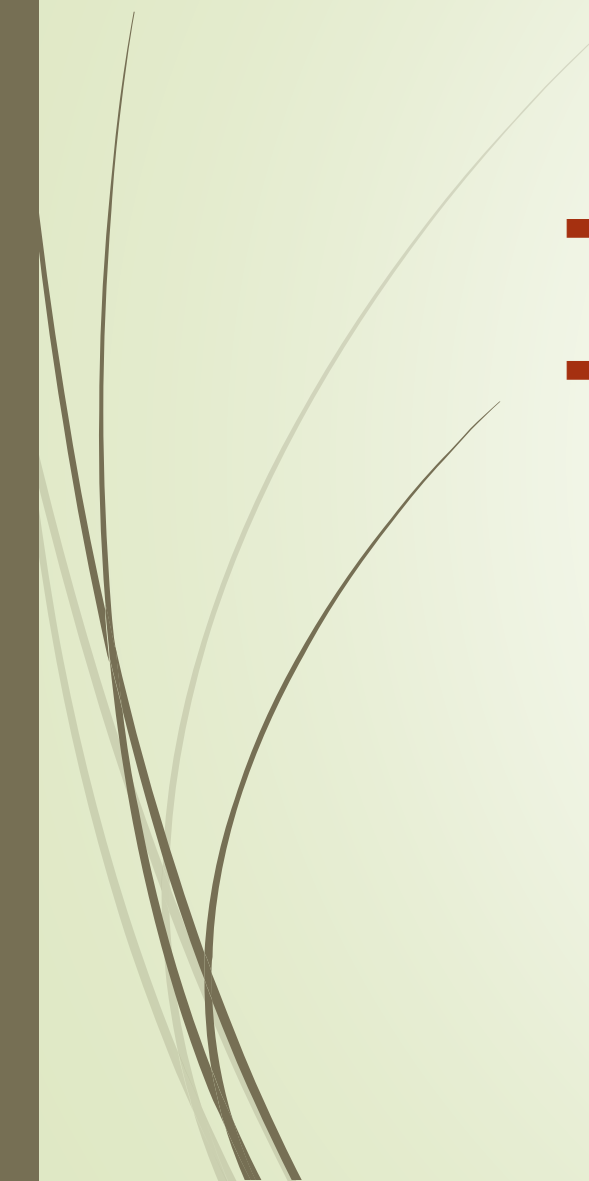
Focus Groups



- ▶ Small groups of participants – 8-12
- ▶ Whereas surveys can be good for large samples but tend to be limited to primarily closed-ended questions
- ▶ focus groups allow for greater depth by bringing together the perspectives of a group of individuals and giving them space to explore their thoughts
- ▶ Unlike surveys, it is also possible to ask follow-up questions if a participant's answer is unclear or if they raise a particularly interesting point.
- ▶ it can be useful for probing patrons' awareness about reference services as well as their satisfaction and opinions about those services.
- ▶ reach far fewer people than surveys, meaning that the findings are limited as well.



Focus Groups

- ▶ One way to maximize the strengths of each methodology while minimizing their disadvantages is to pair the two together.
 - ▶ A survey can be used to get an overview of the community's perspectives, while follow-up focus groups can probe into the questions or concerns raised by the survey.
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Focus Groups



- ▶ Focus group becomes the most useful tool available when:
 1. Immediate follow-ups on responses would provide a richer study.
 2. Individual surveys are hard to carry out for logistical or other reasons.
 3. Group consensus on issues is as valid as or more valid than individual preferences.
 4. Existing data are puzzling and require community interpretation.
 5. Areas of modification or change are unclear so that a preliminary sense of group priorities is required.
 6. Community investment is an issue that needs to be jumpstarted or fanned into greater intensity.



Transcript Reviews

- ▶ Reference interactions that take place by chat or e-mail usually generate a transcript that documents the transaction.
- ▶ these transcripts will show every aspect of the interaction
 - ❑ librarian's greeting
 - ❑ the reference interview questions asked
 - ❑ any attempts at instruction
 - ❑ the format of the answer provided
 - ❑ sources cited, and
 - ❑ how the interview is closed.
- ▶ virtual reference transcripts can be useful in evaluating the reference interview and the overall quality of the reference service