Assessing in-person reference service using WOREP

WAAL 2010, Milwaukee, WI
of Wisconsin-Madison
University General Library System
Introduction

- UW Madison campus context
  - A distributed library system (50+ libraries)
- Era of formalized assessment
- Formalized campus reference services (RMT)
- RAIG (Reference Assessment Implementation Group)
  - Public Services Statistics (Sweeps Week)
  - WOREP
  - Other assessment initiatives
WOREP Overview

- Wisconsin Ohio Reference Evaluation
  https://worep.library.kent.edu/index.php?page=home

- Designed to assess the outcome of the reference transaction and to identify factors related to success or lack of success

- Developed in 1983, administered by Kent State University
WOREP Features:

- Assesses both patron satisfaction and staff evaluation of the reference transaction:
  - Collections, subject strength, staff skills and knowledge, question types, staff type (students, professional, etc.)
- Adaptable to academic and public libraries
- Nationally recognized (100 academic and 85 public)
- Validated...
- Used at the ‘reference area’, point of contact
- Cost is minimal
Implementation Steps

- Site Coordinators and training
- FAQs designed
- Staff information forums
- Procedural decisions:
  - Sample size (100 for detailed analysis), timing
  - Best practices
  - Dissemination logistics
  - Patron confidentiality, submissions
Benefits

- Cost-effective ($1.25 per form)
- Valid, tested assessment tool
- Easy to implement
- Provides national comparative data
- Facilitates dialogue about assessment (qualitative)
- Enhances relationship with patrons (we value their opinion)
- Informs future assessment priorities
Challenges

- Limited in scope:
  - Measures only walk-in service (generally at a dedicated service desk/point)
- WOREP Report
  - Complex
  - Did not clearly identify source of data (that is, a one-to-one correspondence/match to questionnaires)
- Investment in post survey assessments (local analysis)
Highlights

- We learned about our quality of reference service as compared with participating peers
- Identified areas for further analysis
  - Perception of busyness by patrons
  - Material type (i.e. facts & statistics)
  - Satisfaction when “referred”
The WOREP return rate is 91.10%. The pie chart shows the percentage of patrons who returned their items, with 23% returning their items by the patron and 21% not returned. The bar chart displays the patron status with percentages for different categories.
Effective instruction!

Question: Patron reports learning something about the library as a result of the reference transaction. This percentage represents patrons that answered either “yes” or “partly.” Only 2.4% answered “no.”
Question: Patrons who found exactly what was wanted and were satisfied by library staff type:

- When helped by a library employee
- When helped by a student

Librarians

- 74% satisfied
- 60.5% peer libraries

Student Employees

- 72.9% satisfied
- 70.3% peer libraries
Question: Patrons who found exactly what was wanted and were satisfied by library employee report of busy/not busy
Agreement in library employee and patron perception of busy/not busy overall

Library employee reports busy or very busy (7.4%); Patron reports that library employee was busy or partly busy (21.5%); library employee and patron report partly busy, busy, or very busy on same transaction (2.7%)
Question: Patrons who found exactly what was wanted and were satisfied – by library employee report of type of question: Facts and Statistics
Question: Patrons who found exactly what was wanted and were satisfied – by library employee report of search/direct/refer/defer

Patrons who found exactly what was wanted when helped by a library employee who referred (definition of “referred”=library employee reports refer)
Lessons

- Administrative
  - Document process
  - Standardize when possible
  - Stay flexible
- Avoid Assumptions
- Results
  - Talk big picture
  - Assessment is a benefit itself
  - Use multiple assessment measures
The Future

- WOREP informed future assessment:
  - Critical Incident Technique
  - READ Scale
  - Ethnographic studies
  - Focus groups
  - Chat transcript analysis
- Collaborating with campus partners
Questions, Comments?

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Thank You