Analysis of READ Scale Data: Comparing Open-Ended Description Blocks with a Categorized Menu

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Who We Are
Timeline of Reference Statistics

1964: Reference librarians in failing to provide the means for accurate judgment of their place and contribution in library service run the serious risk of having their work undervalued or ignored. (Logan)

1987: ALA symposium on reference service agree that reference service is more than short, unambiguous questions and answers. Definitions for reference and directional services are being developed. (Logan)

2002: Association of Research Libraries (ARL) survey hoped to reveal current best practices, but instead “revealed a situation in flux”. The study reveals a general lack of confidence in current data collection techniques. With many librarians feeling as busy as ever, some have concluded that the reference service data being collected does not accurately reflect their own level of activity. (Gerlich)

2007: The READ Scale (Reference Effort Assessment Data) places an emphasis on recording the skills, knowledge, techniques and tools utilized by the librarian during a reference transaction. (Gerlich)


Reference Statistics at Viterbo

- For 15 years, quantitative reference statistics were recorded for the following:
  - Equipment
  - Reference
  - Directional

- Stats were useful for staffing the desk and comparing yearly totals.

- Beginning in 2010, the READ Scale was implemented, adding a qualitative aspect.
Questions from Literature

Does a hash mark really represent the reference transaction?
Does a statistic adequately represent the value and quality of reference?

(Logan, 2009)
Why Reference Stats?
What is the READ Scale?

2007: Bella Karr Gerlich and G. Lynn Berard develop the READ Scale (Reference Effort Assessment Data), a six-point scale tool for recording vital supplemental qualitative statistics. Available at http://www.readscale.org

<table>
<thead>
<tr>
<th>READ Ranking *</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 - Generally little time, no specialized knowledge, skills or resources consulted</td>
</tr>
<tr>
<td>2 - Require minimal knowledge/expertise, nominal resources consultation</td>
</tr>
<tr>
<td>3 - Used ready-reference resources (including online tools), minimal instruction of user required, need reference knowledge and skills.</td>
</tr>
<tr>
<td>4 - Research requests that require consultation of multiple resources, more instruction-based with in-depth research skills being taught.</td>
</tr>
<tr>
<td>5 - Substantial effort and time, multiple resources consulted, efforts are cooperative in nature between user and librarian, consultations with individuals may be scheduled.</td>
</tr>
<tr>
<td>6 - Most effort and time expended, staff may be providing in-depth research and services for a clients specific needs, primary and secondary resources may be used.</td>
</tr>
</tbody>
</table>
Our READ Scale History

The new information added by the READ Scale was helpful by adding specifics the following:
- Resource selection
- Trends in assignments, software struggles
- Understanding the wide range of knowledge needed to staff the reference desk

Much of this information was gained from an open-ended text box, making it difficult to assess. After four years we realized we needed to streamline.
Information We Collect

VU Reference Spreadsheet - READ Scale

Time *
Please pick an approximate time.

Librarian/Staff Member *

Day of Week *

Method *
- In person
- Email
- Chat
- Phone

Location *
- Reference Desk
- Circulation Desk
- Archives
- Out of library/Campus
- Library Roaming
- Office
- Other: ____________________

Description of Transaction (If transaction covered multiple components, please record additional information below.)
Please choose a category. Write out a transaction only if these do not fit.

Description of Transaction #2. (Use only if your transaction had multiple components.)
Please choose a category. Write out a transaction only if these do not fit.

Description of Transaction #3. (Use only if your transaction had multiple components.)
Please choose a category. Write out a transaction only if these do not fit.

Description of Transaction (Use only if the above transaction descriptions do not fit.)

READ Ranking *
- 1 - Generally little time, no specialized knowledge, skills or resources consulted
- 2 - Require minimal knowledge/expertise, nominal resources consultation
- 3 - Used ready-reference resources (including online tools), minimal instruction of user required, need reference knowledge and skills.
- 4 - Research requests that require consultation of multiple resources, more instruction-based with in-depth research skills being taught.
- 5 - Substantial effort and time, multiple resources consulted, efforts are cooperative in nature between user and librarian, consultations with individuals may be scheduled.
- 6 - Most effort and time expended, staff may be providing in-depth research and services for a clients specific needs, primary and secondary resources may be used.

Submit

Never submit passwords through Google Forms.
### Description of Transaction (If transaction covered multiple components, please record additional information below.)

Please choose a category. Write out a transaction only if these do not fit.

<table>
<thead>
<tr>
<th>Category</th>
<th>Components</th>
</tr>
</thead>
<tbody>
<tr>
<td>Instructional</td>
<td>catalog, database, localizing materials</td>
</tr>
<tr>
<td>Directional</td>
<td>campus, library, community</td>
</tr>
<tr>
<td>Interlibrary loan</td>
<td>accounts, requests</td>
</tr>
<tr>
<td>Library information</td>
<td>hours, services, policies</td>
</tr>
<tr>
<td>Technology troubleshooting</td>
<td>scanning, software, email, Internet, printing, access</td>
</tr>
<tr>
<td>Citation help, RefWorks</td>
<td></td>
</tr>
<tr>
<td>Moodle</td>
<td></td>
</tr>
</tbody>
</table>
Our Research Questions

Did we lose valuable information by switching from one collection method to another?

Does the READ Scale still retain its importance with this change?
**Our Study**

**Step One:** Take 2010-2014 open-ended descriptions and code them with the 2014-2015 categories.

**Step Two:** Take those categories and perform a lexical study using MaxQDA to see what information can be discovered.

<table>
<thead>
<tr>
<th>Timestamp</th>
<th>Time</th>
<th>Librarian/Staff Member</th>
<th>Method</th>
<th>Kind of Question</th>
<th>READ Ranking</th>
<th>Location</th>
<th>Description of Transaction</th>
<th>Day of Week</th>
<th>Coding</th>
</tr>
</thead>
<tbody>
<tr>
<td>11/17/2011 14:47:30</td>
<td>3pm</td>
<td>In person</td>
<td>Reference</td>
<td>4 - Research requests that require</td>
<td>Reference Desk</td>
<td>Reference Desk</td>
<td>Helped find books about history of women’s rights movement from the 1800s, especially items tied toward women in the military.</td>
<td>Thu</td>
<td>I</td>
</tr>
<tr>
<td>11/17/2011 15:00:13</td>
<td>3pm</td>
<td>In person</td>
<td>Reference</td>
<td>3 - Used ready-reference resources (including)</td>
<td>Reference Desk</td>
<td>Reference Desk</td>
<td>Found readalikes for a patron.</td>
<td>Thu</td>
<td>I</td>
</tr>
<tr>
<td>11/17/2011 15:13:07</td>
<td>3pm</td>
<td>In person</td>
<td>Reference</td>
<td>3 - Used ready-reference resources (including)</td>
<td>Reference Desk</td>
<td>Reference Desk</td>
<td>Locating a video</td>
<td>Thu</td>
<td>I</td>
</tr>
<tr>
<td>11/17/2011 15:46:36</td>
<td>3pm</td>
<td>In person</td>
<td>Reference</td>
<td>6 - Most effort and time expended, staff may</td>
<td>Reference Desk</td>
<td>Reference Desk</td>
<td>Worked with a theatre student on finding historic newspapers</td>
<td>Thu</td>
<td>I</td>
</tr>
<tr>
<td>11/17/2011 16:14:11</td>
<td>4pm</td>
<td>In person</td>
<td>Reference</td>
<td>6 - Most effort and time expended, staff may</td>
<td>Reference Desk</td>
<td>Reference Desk</td>
<td>Researching 1850s Chinese newspapers</td>
<td>Thu</td>
<td>I</td>
</tr>
<tr>
<td>11/17/2011 16:30:46</td>
<td>4pm</td>
<td>In person</td>
<td>Reference</td>
<td>2 - Require minimal knowledge/expertise</td>
<td>Reference Desk</td>
<td>Reference Desk</td>
<td>APA style web page citation</td>
<td>Thu</td>
<td>C</td>
</tr>
<tr>
<td>11/17/2011 17:04:57</td>
<td>5pm</td>
<td>Phone</td>
<td>Reference</td>
<td>4 - Research</td>
<td>Reference Desk</td>
<td>Reference Desk</td>
<td>Helped a student (1) learn how to find the full text of articles and (2) use the ILLiad</td>
<td>Mon</td>
<td>I</td>
</tr>
</tbody>
</table>
Process: Sample Coding

- Remove the items that had been categorized as “Directional” READ scale 1 & 2
- Sampling with Kim and Gretel to normalize:
  - Use the 2014-2015 categories and see if all items can fit.
- Code 2010-2014 transactions, focused on “I,” “T,” or “L”
  - I = Instructional (sampling)
  - T = Technical
  - L = Library Policies
  - M = Moodle
  - C = Citation
  - L = Library Policy
Process: Lexical Search

- Using MaxQDA, code each set of open-ended descriptions for I, T, and L.
- Began by searching known terms, then coded individual transactions.
- Challenge was to code using the language in the results and not “pre-categorize.”
Findings

Coded Segments by Academic Year

- Instructional
- Library Service
- Technology

- 2010-2011
- 2011-2012
- 2012-2013
- 2013-2014
- 2014-2015
Findings

TECHNOLOGY CODING RESULTS
- Printing: 38%
- Wifi access: 27%
- Office suite: 10%
- Login: 8%
- Passwords: 7%
- Email: 5%
- Mac login: 3%
- Other: 2%
- iPad: 1%
- Copier: 1%
- DVD: 0%
- Vitnet: 0%

LIBRARY SERVICE CODING RESULTS
- Library Policy: 14%
- Hours: 13%
- Print Account: 11%
- Reserves: 11%
- Technology check-out: 9%
- Study Room: 8%
- Item on Hold: 5%
- Renewal: 5%
- Library Service: 5%
- Office Supplies: 6%
- Passwords: 5%
- Alumni: 4%
- Streaming: 3%
- Lost and Found: 3%
Findings

Frequency of Instructional Coding Type

- Topic: 45%
- Specific Item/Tool: 19%
- Search Strategy: 13%
- Software: 9%
- Service: 7%
- Mechanics: 10%
- Software: 5%

Sum of Instructional Questions in Coding Type

- Specific Item/Tool: 39%
- Topic: 18%
- Mechanics: 14%
- Search Strategy: 13%
- Service: 7%
- Software: 9%
Findings: Using READ Scale Ranking

READ Scale Ranking by I Category

- Topics
- Tools and Specific Items
- Mechanics
- Search Strategy
Conclusions: What We Gain

• The change resulted in gaining time in completing reference tracking more quickly at the desk.
• Focus on important areas that we know to be common questions.
• READ scale is a strong tool to prove value of reference desk to administration.
Conclusions: What We Lose

- Sometimes rich detail on what our students are asking for (depends on who is recording).
- Trends in service.
- Details and information regarding research topics and resources.
Conclusions: Reflective Practice

Does the act of writing contribute to learning and/or retention process for the librarian by becoming a type of reflective practice? Is this lost with the removal of the open-ended description box?

Reflective practice is “a dialogue of thinking and doing through which I become more skillful.”

Where to Go From Here?

• Finish lexical coding of all Instructional transactions to have a solid data set on trends.

• Continue connecting lexical coding to READ rankings.

• Simplifying from to have only one category drop-down (triple drop-downs weren’t being used).

• Re-adding text box for research topic or resource for assessment and collection development.

• Discussing results in depth with librarians to determine areas for further assessment.
Delightful Descriptions

• Can't get computer to work - push button
• Visiting patron asked if I thought "sit" rhymes with "it." I said yes.
• Visitor waiting for wife said our library looks like Harvard! Then asked which automated citation tool was best for doing APA but then his wife came and he left!
• Hello, do you have some time to help a stressed college girl out?
• Find Full Text. Very much instruction.
• How to powerpoint
• Student asked for our two cents (literally), so I gave her two pennies from the drawer.
QUESTIONS?

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