Using the Wisconsin–Ohio Reference Evaluation Program (WOREP) to Improve Training and Reference Services

by Eric Novotny and Emily Rimland

This article discusses a service quality study conducted in the Pennsylvania State University Libraries. The Wisconsin–Ohio Reference Evaluation Program survey was selected as a valid, standardized instrument. We present our results, highlighting the impact on reference training. A second survey a year later demonstrated that focusing on behavioral aspects of reference can improve service quality ratings.

INTRODUCTION

In the late 1990’s the Pattee Library at the University Park campus of Pennsylvania State University underwent a radical transformation. Along with extensive physical renovations, the library collections and services were re-distributed into newly created subject and format libraries. These “libraries within a library” were designed to focus on assigned areas. It was expected that by concentrating on specific disciplines the subject libraries would be able to provide enhanced levels of service for their users. This article discusses the use of the Wisconsin–Ohio Reference Evaluation Program (WOREP) survey instrument to collect data on reference quality at one of the newly created service desks. We focus on how the Arts and Humanities subject library modified service desk training based on the results of the WOREP study, and its impact on the delivery of reference service. A second WOREP study was conducted a year later to assess the effectiveness of the changes we made. The second study showed vast improvements in how patrons rated our reference services. As a result of these experiences the authors suggest best practices for quality service training.

The authors work in one of the newly created subject libraries, the George and Sherry Middlemas Arts and Humanities Library. The Arts and Humanities Library provides collections and services in a variety of subject areas including: area studies, classics, dance, film, history, languages, literature, music, philosophy, religious studies, theater, and the visual arts. To serve users in these intellectually diverse subject areas, the Arts and Humanities Library staffs two service desks. The Arts and Humanities Reference Desk is housed near the print reference works, and is adjacent to an entry point to the circulating collection of approximately one million volumes. The Music and Media Center (MMC) desk provides circulation services for the closed-stack collection of approximately 20,000 sound and 5000 video recordings, a course-reserve service for media, and reference service for music and media. During the study period, both service desks were staffed every hour the library was open, a total of 102 hours per week each. Staff included six faculty librarians, five full-time staff assistants, and 2.5 FTE part-time reference assistants (students). Both desks participated in the study.

From the onset it was clear that Arts and Humanities reference staff faced a daunting challenge. They were expected...
to be knowledgeable about the core print and electronic resources in a staggering range of disciplines, everything from Art and Music, to History and Asian Studies. To address this, an extensive training program was devised to ensure that staff were aware of key resources. New hires received a lengthy orientation manual which was reviewed with the Coordinators of Reference Services over many hours of individual sessions. This initial orientation was supplemented by staff training sessions conducted throughout the semester. Led by subject specialists, these sessions typically covered resources in a single discipline in depth, or reviewed course assignments expected to generate significant amounts of questions at the service desks. In spite of these elaborate (and time-intensive) efforts, there was a sense that our service offerings fell short of the ideal envisioned by the subject library model. Informal observations and conversations revealed instances of less than satisfactory service, but we lacked evidence beyond the anecdotal. Penn State participates in the LIBQual+ program used to collect data on patron impressions of service quality, but the instrument is designed to measure service in general, and does not specifically relate to reference desk transactions. Also, users are asked to respond about the library’s services as a whole, making it impossible to pinpoint the performance of a specific service unit. The study discussed in this article was conducted to collect quantitative and qualitative data on patron’s perceptions of reference service in the Arts and Humanities Library.

Literature Review: Assessment and Training

Evaluating reference quality has been a concern of librarians since the genesis of the profession, and literature on this topic is copious. The Reference Assessment Manual (RAM) published in 1994 by the Reference and Adult Services Division of ALA has served as a resource for librarians interested in reference evaluation methodology. Since its publication, librarians have continued to debate and conduct research on assessing reference service quality.

One way to break down the mountain of research in this area is by looking at two main methodologies for analyzing the reference encounter—obtrusive and unobtrusive studies. Unobtrusive studies are evaluations in which reference staff are unaware that a study is taking place. Recognized unobtrusive studies were introduced in the 1960s by Crowley and Childers. The seminal article that reported this type of study was Hernon and McClure’s “Unobtrusive Reference Testing: The 55 Percent Rule,” which introduced the disheartening 55 percent accuracy benchmark to the profession in 1986. Although popular, the methodology used by many unobtrusive evaluators in the past only distinguishes between right or wrong answers and does not account for the complexities that comprise most reference questions. Because of these black and white limitations, newer studies have been developed to account for the nuances and behaviors involved in answering reference questions. For example, Joan Durrance’s “Willingness to Return” study introduced new measures into unobtrusive studies by measuring the willingness of a patron to return to the same library staff member for help with another question. Dewdney and Ross were able to use Durrance’s measures to target how particular aspects of the reference transactions (such as how the interaction is terminated) affect reference success. The unobtrusive evaluation has been used most recently to target particular aspects of reference transactions rather than the overall success or failure of answering a question correctly.

The most common manifestation of the obtrusive study—where participants know they are being evaluated—is the user survey. Although reputed for their valuable insights, user surveys are often plagued by response bias on the part of the user, who, rather than responding with their honest feelings, responds with answers they feel are expected of them. In addition to response bias, another caveat of employing user surveys is the lack of differentiation between measures of satisfaction and measures of success. While similar and closely related, satisfaction and success are, in fact, different measures. Satisfaction can be simply defined as the overall outcome of the encounter, while success contributes (usually quite largely) to that overall experience. For example, a patron may not find exactly what he or she wanted, but can still feel generally satisfied if they experienced friendly service at the library. For this reason, it is important to measure satisfaction and success separately and provide a finer level of granularity when using surveys to evaluate reference service.

To address survey response bias, and to separate satisfaction from success, Marjorie Murfin, Gary Gugelchuk, and Charles Bunge developed a new instrument in the mid 1980s, first known as the Reference Transaction Assessment Instrument (RTAI), and known today as the Wisconsin–Ohio Reference Evaluation Program or WOREP. After each reference transaction, the staff member and patron complete separate surveys, rating different aspects of the reference encounter. At the conclusion of the survey period, the survey pairs are reunited for processing using a unique identifier. The result is a relatively complete picture of each reference transaction furnished to the participating library. Transactions are only considered successful if the patrons indicate that they found exactly what they wanted, were fully satisfied with the transaction, and do not indicate any reasons for discontent.

A few features of the WOREP set it apart from other user surveys. The main benefit is its decoupling of service ratings from success ratings, which provides unambiguous measurements in these areas and increases the legitimacy of the test. Another advantage is the use of standardized, expertly designed questionnaires. Due to the standardization of the WOREP survey, statistical analysis of completed WOREP surveys can be expedited at a processing center. Participating institutions are able to benchmark results with other libraries using a shared database. These benefits have made the WOREP a popular choice for reference evaluation because libraries can easily recognize their areas of strength and target areas that need improvement. For example, Brandeis University was able to put its new tiered reference model to the test and found through a WOREP study that the amount of time spent on questions contributed to its high reference success rates. Other studies have used the WOREP to examine how techniques from the business world can help to improve reference service.

Although newer techniques for evaluating reference effectiveness have been introduced, there is by no means agreement as to which method is best. However, studies that reflect the true complexities of reference transactions are a welcome addition to earlier studies that only view success in black and white.

WOREP Study at Penn State

In Fall 2001 the Arts and Humanities Library agreed to participate in the Music Library Association’s WOREP study. Music libraries at colleges and universities are frequently
decentralized (branch) libraries that tend to be staffed by students and paraprofessionals a higher percentage of time than centralized library service points such as general reference desks. Yet music reference service is a specialty requiring knowledge of music and music formats, particular rules for description and access in library catalogs, and an array of reference sources and techniques. Recognizing this, members of the Reference Performance Subcommittee of the Music Library Association designed a research project to evaluate which library and staffing characteristics have a significant effect on the overall question-answering success of reference staff in the decentralized music library environment. The Music Library Association chose the WOREP as its evaluation instrument because it was “a valid and reliable tool for measuring effectiveness in answering reference questions.”13 The study utilized a slightly modified version of the standard WOREP survey instrument (see Appendix A).14 This form was used at both the Arts and Humanities Reference Desk and the Music and Media Center desk.

To prepare library staff, the WOREP guidelines were discussed at staff meetings before the survey began. The survey form was reviewed to ensure that staff were familiar with the questions and interpreted them the same way. As recommended by WOREP, a sampling test period was designated during a ‘normal’ time of year. All patrons asking a question (other than Directional) in the Arts and Humanities Library were asked to participate in the survey. Surveys were distributed until the required minimum of 100 completed surveys were obtained from each service desk which took a total of twenty days. During this period survey data were collected for 201 reference questions asked at the Arts and Humanities Reference Desk and 100 reference questions at the Music and Media Center desk. An additional 1173 and 946 directional questions were recorded at the Arts and Humanities and Music and Media Center desks respectively, but patrons with these types of questions were not asked to participate in the survey.

When compared to the aggregate WOREP population the Arts and Humanities sample included more juniors and fewer sophomores. This reflects student enrollments at the University Park campus. Juniors are the largest population at University Park (around 23 percent) due to transfers from other Penn State campuses offering two year degrees. Graduate students make up around 14 percent of the student population at University Park Table 1.

The primary success measure we focused on was the percentage of users who reported that they “Found exactly or approximately what they wanted AND were satisfied.” At the Arts and Humanities Reference Desk 64 percent of participants described the interaction this way for the “complex” reference questions (those that did not involve looking for a known item). This was six percentage points below the average on this measure for all WOREP libraries (70 percent). Alarmingly, fewer than half of the 2001 respondents (47 percent), reported finding EXACTLY what was wanted and were satisfied at the Arts and Humanities Reference Desk. Again, this was well below the WOREP average (58 percent). While there were exceptions, the Arts and Humanities Reference Desk consistently performed below the WOREP average on most measures.

Music and Media Center employees performed better: for the more complex reference questions that comprised two-thirds of the question pool, users reported they found exactly or approximately what they wanted, and were satisfied, 72 percent of the time (the national average for all libraries was 70 percent). Their performance with specific- or known-item questions (one-third of the sample) was also within 2 percentage points of the national average: users found exactly what they wanted 58 percent of the time compared with the national average of 60 percent.

Given our desire to provide excellent service, the results of the initial WOREP survey were disappointing overall, and generated substantial discussion and analysis. The remainder of this article describes the steps taken to improve service quality, and the results achieved in the Arts and Humanities Library.

**Table 1**

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</thead>
<tbody>
<tr>
<td>Freshman</td>
<td>17.2</td>
<td>16.5</td>
<td>16.0</td>
</tr>
<tr>
<td>Sophomores</td>
<td>9.9</td>
<td>8.6</td>
<td>15.0</td>
</tr>
<tr>
<td>Juniors</td>
<td>23.9</td>
<td>28.3</td>
<td>17.6</td>
</tr>
<tr>
<td>Seniors</td>
<td>21.9</td>
<td>23.7</td>
<td>21.5</td>
</tr>
<tr>
<td>Graduates</td>
<td>12.5</td>
<td>15.8</td>
<td>15.6</td>
</tr>
<tr>
<td>Faculty</td>
<td>4.2</td>
<td>3.3</td>
<td>3.6</td>
</tr>
<tr>
<td>Other (staff, alumni)</td>
<td>10.4</td>
<td>3.8</td>
<td>10.7</td>
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**Clues to Less than Successful Performance**

An important feature of the WOREP is that it not only records user satisfaction, but it also gathers data on aspects of the encounter that may contribute to the success (or failure) of the reference interaction. Users report on factors such as the quantity of information provided, the amount of attention they received, and the perceived knowledge of the staff person assisting them. For the same encounter library staff record information such as the perceived depth of the collection on the topic, and the level of activity at the desk. These data can help libraries identify specific environmental and behavioral factors that influence patron outcomes.

After analyzing the data from the survey (see Table 2 for a summary of selected data), we identified several areas that we felt could be improved. These included:

**Time** – Arts and Humanities reference desk staff reported spending less than three minutes on almost half (45 percent) of the more complex questions (those not involving known items). The average for all WOREP participants was 35 percent. This indicated we were concluding the reference encounter more quickly than our peers. Although this could be an indicator of staff efficiency, the relatively low satisfaction ratings suggested we were not spending enough time with our users.

**Sources** – We reported using one source at the Arts and Humanities Reference Desk 47 percent of the time, versus 42 percent for all WOREP participants. The single source was usually the library catalog. Often we were not alerting...
Table 2
 Selected 2001 WOREP Study Results

<table>
<thead>
<tr>
<th>Survey Measure</th>
<th>Arts and Humanities Reference Desk</th>
<th>All WOREP libraries</th>
</tr>
</thead>
<tbody>
<tr>
<td>Patrons who “found exactly or approximately what was wanted” and satisfied</td>
<td>64.5%</td>
<td>69.9%</td>
</tr>
<tr>
<td>Employee reports information “found”</td>
<td>72%</td>
<td>68.5%</td>
</tr>
<tr>
<td>Patron reports “found exactly” and was satisfied</td>
<td>47.1%</td>
<td>58.2%</td>
</tr>
<tr>
<td>Patrons finding exactly what was wanted when library staff “helped with the search”</td>
<td>53.9%</td>
<td>66.0%</td>
</tr>
<tr>
<td>Patrons finding exactly what was wanted when library staff “directed or suggested only”</td>
<td>36.7%</td>
<td>54.0%</td>
</tr>
<tr>
<td>Library staff use only one source</td>
<td>47.4%</td>
<td>42.0%</td>
</tr>
<tr>
<td>Library staff answers question in less than three minutes</td>
<td>45.7%</td>
<td>35.4%</td>
</tr>
<tr>
<td>Patron reports “not enough explanation or help”</td>
<td>12.3%</td>
<td>7.3%</td>
</tr>
<tr>
<td>Patron reports “library employees only partly or did not understand what was wanted”</td>
<td>10.1%</td>
<td>5.1%</td>
</tr>
<tr>
<td>Patron reports “not enough” information</td>
<td>15.2%</td>
<td>12.5%</td>
</tr>
<tr>
<td>Staff reports “books off shelf”</td>
<td>13.0%</td>
<td>4.3%</td>
</tr>
</tbody>
</table>

The physical Environment was identified as another key factor. In 13 percent of the interactions respondents at the Arts and Humanities Reference Desk indicated that “Books off shelf” was a problem. This is more than three times the WOREP average of 4 percent. This was not unexpected. The Arts and Humanities print collections are dispersed over seven floors making it difficult for reference desk staff to assist users in locating materials found in the online catalog. The distance of the service desk from most of the circulating collection also limits the ability of staff to help users find alternative sources if their first choices are not on the shelf.

Communication – Library employees and patrons reported differing success rates. Library staff were far more likely than our patrons to conclude that the encounter had gone well. Employees reported that the desired information was “found” 72 percent of the time. Patrons at the Arts and Humanities Reference Desk indicated that they “found exactly” what they wanted 47 percent of the time. This twenty-five point gap indicated to us that there was a breakdown in communications at some point in the reference process.

Mode of interaction – For each question library employees reported whether they “Directed and suggested only” or “Helped with or made search.” Patrons were more likely to report finding what they wanted if they had help searching. Fifty-four percent reported “Found Exactly” when helped with the search, versus 37 percent who only got “Directions and Suggestions.” These results were consistent with the WOREP averages across all libraries, which reveal that fewer respondents report “Found Exactly” when library staff direct or suggest only, compared to when the staff helped with the search (54 percent to 66 percent, respectively).

In addition to the factors cited above, another measure was investigated as a cause of our below average satisfaction ratings. This was the use of employees other than professional librarians at service desks. The WOREP instrument collects data about the staff completing the survey. Categories are Professional Librarian, Library Assistant, and Student/Other Employee. This allows for analysis of the data by the level of staff involved in answering the question. Although differences were present in the 2001 study, they were not emphasized in subsequent training conversations. More important to us was that all staff levels performed below average. As a group, even the subject specialists at the Arts and Humanities Reference Desk performed below the WOREP average on the “Found exactly or approximately what they wanted AND were satisfied” measure. Rather than highlighting staff differences, we wanted to make clear that the data pertained to everyone in the Arts and Humanities Library, and we all had to commit to a solution.

Responding to the Study Results

Based on the results and analysis described above, it was clear that there was room for improvement in service performance. Staff meetings were used to report the results, raise awareness of the issues, and brainstorm ideas. The critical issue was to get staff to “buy-in” to the process. At this juncture the standardized nature of the WOREP proved invaluable. The (not unexpected) reaction of some staff upon hearing the results was to poke holes in the methodology—what could be called the “Yeah, but...” response. “Yeah our results were mediocre, but that’s because our patrons don’t know what they want.” A benefit of the WOREP is that it has been utilized nationally, allowing for comparisons with peers. Those dismissing the results had to provide a credible explanation for why our patrons differed so dramatically from other institutions. Following the meeting at which the data were shared, two brainstorming sessions were held in which everyone’s responses and opinions were heard and validated, followed by a third group discussion inviting everyone to offer
ideas for improvements and solutions. Once staff realized their ideas would become part of the solution, they bought into the process.

After the results were disseminated and accepted, the entire staff discussed best practices with an emphasis on communication and behavioral aspects, areas that the WOREP had identified as critical. This represented a marked change in approach. As noted earlier, prior training efforts were heavily resource-based, usually led by subject specialists who went into great detail about the many specialized tools in their disciplines. While these sessions were essential for building up a core knowledge base among public service staff, the WOREP results indicated that fundamental behavioral techniques were also key to promoting reference success. Of course, this is not news to anyone familiar with the reference assessment literature, but the WOREP results provided concrete data supporting the importance of the behavioral component of the reference encounter.

To build upon the WOREP results, summer staff meetings were devoted to discussing selected reference articles and training videos. We found it helpful to provide excerpts of the articles to maximize staff time and avoid portions of an otherwise outstanding article that employed a tone that might be viewed as denigrating to non-professional staff. The videos, while entertaining, proved less helpful than the readings. We were unable to identify a recent general video on how to conduct a quality reference interview. The ones we did obtain were outdated. They probably generated more discussion about the antiquated clothing styles than effective communication techniques.

Based on the group conversations and discussion of the literature on reference success, we were able to agree on a list of ideal desk behaviors emphasizing areas identified by the WOREP results. A representative selection is provided here to give a sense of how the study results were translated into recommended reference practices.

1. Get out from behind the desk as often as possible and assist users with their searches (those who had “Help with the Search” were more likely to rate the outcome successful).

2. Always think of, and mention to the user, at least two sources (we had reported using only one source more often than the WOREP average, a factor that was seen as contributing to less than successful encounters).

3. Do not assume the online catalog is always the first place to look (related to #2).

4. Offer alternatives in case the requested volumes are not on the shelf; interlibrary loan, others books on the same topic, articles on the topic, etc.... (to address issues with the physical environment and “Books Not on Shelf” discussed earlier).

See Appendix B for the complete list of ideal desk behaviors.

Though reference performance at the Music and Media Center desk was of less concern, due probably to its compact, closed-stack collection, and more focused subject coverage (music and media), we nevertheless provided refresher training for music reference, emphasizing use of the library catalog in more advanced ways, including uniform titles and subject headings, and helping staff to think more creatively about alternative sources when requested items were not on the shelf.

Our training techniques, and the list of best practices we developed, are probably familiar to anyone who provides public service. We certainly could have had similar conversations without conducting a formal study. The value of participating in the WOREP was that it provided a “wake-up” call. At the first meeting there was much gasping as the numbers were reported in rather stark, unambiguous terms. The WOREP data greatly facilitated staff buy-in for the subsequent “back to basics” reference training that was developed. Without the study results as a catalyst, it is difficult to imagine experienced reference staff engaging so willingly in a series of discussions about how to spend more time with users, or the importance of consulting more than one resource when answering a question. Most of us probably assume we are already doing these things satisfactorily. The WOREP study provided an invaluable refresher to everyone, the authors included, of the importance of these habits and techniques in the success of the reference encounter.

**Did the Training Work?**

In Fall 2003, the Arts and Humanities Library conducted a follow-up study to determine the effectiveness of the training conversations. Procedures were the same as described for the 2001 study. During the sampling period 152 completed forms were collected at the Arts and Humanities Desk. Upper-level undergraduates and graduates made up a higher proportion of respondents when compared to the earlier study (see Table 1).

Desk staffing remained nearly constant from the 2001 study. Only two-part time student workers were new out of a total staff of 13.5 FTE. The reference environment was also fundamentally unchanged. As will be seen below, access to the circulating collections continued to present obstacles in helping patrons locate exactly what was desired. While these factors remained essentially constant, the 2003 WOREP survey results improved in almost every category. A few examples include:

More Time – After emphasizing this in our discussions, we reported answering a question in less than three minutes far less often. This figure declined from 45 percent in 2001 to 10 percent in 2003 (see Fig. 1). This suggests we were spending more time listening, communicating, and better helping our users.

More sources – In the 2001 study we used only one source almost half the time. Training sessions emphasized mentioning other useful sources to ensure that patrons were aware of the range of options available to them (library Web guides, article indexes, print reference resources, etc.) In 2003 we reduced the times we used only one source by more than half (see Fig. 2). Likely as a result, patrons reporting that they learned more than one new reference source increased 9 percentage points (see Fig. 3). This suggests that library employees were going beyond the library catalog and showing our users additional resources. Most importantly, the percentage of
patrons reporting “not enough” help declined from 12 percent to 3 percent (see Fig. 4). Patrons reporting “not enough” information also declined from 15 percent in 2001 to 5 percent in 2003.

More Communication – The extra time spent with patrons and the extra sources consulted may explain the convergence of patron and staff reports of success. In 2001 library employees reported that they found the requested information 72 percent of the time. Patrons reported that they found exactly what they were looking for only 47 percent of the time, a gap of 25 percentage points. In the 2003 study this gap was narrowed to only 8 percentage points (see Fig. 5). This suggests that library staff were doing a better job discovering and responding to the patron’s “real” question.

Same Physical Environment – The Arts and Humanities Desk at Penn State continued to experience a higher than average percentage of questions where books were reported as not on the shelf (see Fig. 6). To counteract this, we brainstormed ways of helping patrons find substitutes for what they were seeking. Although the percentage of books off the shelf essentially remained the same, the increase in satisfaction from 2001 to 2003 suggests that we were successful in finding alternatives for our patrons (see Fig. 7).

More Success – Ultimately the improvements reported above are of little intrinsic value, unless they also lead to increased reference accuracy and patron satisfaction. In the Arts and Humanities Library we found that making the behavior modifications outlined above correlated with better service ratings. Patrons with complex questions in 2003 reported they found “Exactly or approximately what was wanted and were satisfied” 83 percent of the time. This was an increase of 19 percent from the earlier survey. The same service point, with essentially the same staff, and ongoing facility issues, went from performing 6 percent below the WOREP average to 13 percent above the WOREP average on this measure of success (see Fig. 7).
At the Music and Media Desk, reference performance also improved. During the 2003 study, users reported that they found exactly the specific- or known-items they were seeking 62 percent of the time, up 4 percentage points from 2001 (with a national average of 60 percent). For the more complex reference questions, users found exactly or approximately what they wanted, and reported they were satisfied, 83 percent of the time, up 11 percentage points from 2001 (national average for libraries: 70 percent).

**CONCLUSION**

Based on our experiences, the authors believe that the WOREP, developed in the pre-Internet 1980s, is still relevant in today’s reference environment. The WOREP results helped identify factors within the Arts and Humanities Library that hindered reference success. Analysis of user feedback allowed us to focus our training efforts, and ultimately, improve our performance.

While our experience was positive, libraries considering the WOREP should be aware of limits to our study. Although we used the same survey instrument, the two studies were conducted at different times, with different patrons and a slightly different staff. Given these and other variables, we cannot “prove” that our increased success rates are attributable to modifications we made in training. It must be conceded that the data provided are not sufficient to allow statistically significant comparisons based on a few percentage points of difference. We are reassured by the uniformly positive movement of the numbers in the 2nd study, suggesting that the changes were not a mere random fluctuation in the data. Other possible factors include that staff may have taken the study more seriously the second time around. While this may explain some of the improvement, it does not diminish the value of the WOREP. Even if some staff consciously tried harder during the second study, we still view the results as a useful reminder of best practices. The second WOREP study results dramatically demonstrated the positive effects that could be achieved by focusing on best reference practices.

It is hoped that Arts and Humanities service staff have internalized these best practices as a result of participation in the study. Among the research questions to explore in any subsequent study, is whether the positive effects observed diminish over time. Have library employees absorbed the lessons learned and incorporated them into their long-term habits? The authors hope a future WOREP survey in the Arts and Humanities Library will help explore these and other questions.
APPENDIX A
WOREP SURVEY AS USED BY THE MUSIC LIBRARY ASSOCIATION
Survey Part 1: Completed by the Patron

The Music Library is doing a survey of reference use and would appreciate it if you would mark the following brief checksheet. Thank you!

Deposit checksheet UNFOLDED in container on leaving this area or on leaving the library. THANKS AGAIN FOR YOUR HELP!

STATUS
○ Freshman
○ Sophomore
○ Junior
○ Senior
○ Graduate student or teaching assistant
○ Continuing education or nondegree student
○ Alumni
○ Faculty
○ Staff
○ Not affiliated with Univ.
○ Major in Teaching RESEARCH AREA
○ Arts or Humanities (other than music)
○ Education
○ Music
○ Business/Management
○ Other Social Sci.
○ Medicine/Health
○ Agric./Biological Sci.
○ Math/Physical Sci.
○ Technology/Engineering
○ Interdisciplinary/Other
○ Major not declared

1. Did you locate what you asked about?
   ○ Yes, just what I wanted
   ○ Yes, with limitations
   ○ Yes, not what I asked for, but other information or materials that will be helpful
   ○ Yes, but not really what I wanted
   ○ Only partly
   ○ No

2. If yes, how did you find the information or materials?
   ○ Library employee found or helped find
   ○ Followed suggestions and found on my own
   ○ Didn't follow suggestions but found on my own

3. Were you satisfied with the information or materials found or suggested?
   ○ Yes
   ○ Partly
   ○ No

4. If partly or not satisfied, why? MARK ALL THAT APPLY.
   ○ Found nothing
   ○ Not enough
   ○ Need more simple
   ○ Need more in-depth
   ○ couldn't find information in source
   ○ library employee wanted a different viewpoint
   ○ Library employee not relevant enough
   ○ Not sure if information given me is correct

5. How important was it to you to find what you asked about?
   ○ Very important
   ○ Moderately important
   ○ Somewhat important
   ○ Not important

6. Was the library employee busy (e.g., phone ringing, others waiting)?
   ○ Yes
   ○ Partly
   ○ No

7. Did the library employee understand what you wanted?
   ○ Yes
   ○ Partly
   ○ No

8. Did you get enough help and explanation?
   ○ Yes
   ○ Partly
   ○ No

9. Were the explanations clear?
   ○ Yes
   ○ Partly
   ○ No

10. Did the library employee appear knowledgeable about your question?
    ○ Yes
    ○ Partly
    ○ No

11. Was the service you received courteous and considerate?
    ○ Yes
    ○ Partly
    ○ No

12. Did the library employee give you enough time?
    ○ Yes
    ○ Partly
    ○ No

13. Did you learn something about reference sources or use of the library as a result of consulting the library employee?
    ○ Yes
    ○ No

14. Did you become acquainted with any reference sources you hadn't previously known about as a result of consulting the library employee?
    ○ Yes, one
    ○ Yes, more than one
    ○ No, none
APPENDIX B
ARTS AND HUMANITIES "BEST PRACTICES" DOCUMENT

B.1. Reference Service Goals

Spend more time with each reference question. (Reference questions answered in less than three minutes are more likely to result in unsatisfied users. We reported spending less than three minutes on the majority of our reference questions.)

Refer users to more than one resource. (Users referred to one source were less likely to be satisfied than those given more than one option.)

Provide hands-on help. Walk the user through the search process, rather than merely suggesting sources. (Users who are involved in the process are more likely to rate the encounter positively, and are more likely to be satisfied with the results.)

Follow-up. Find out if the patron really found what they were looking for. (Users often reported not finding what they needed even when staff felt they answered the question. Always double-check to make sure you have fully met the patron’s needs.)
B.2. Behaviors for Successful Reference Encounters

B.2.1. Be Approachable

1. Avoid appearing immersed in work/desk activities. Scan the area periodically to see if anyone nearby appears in need of assistance.

2. Make eye contact with everyone who walks by or near the desk.

3. Ask “May I help you?” as patrons approach.

B.2.2. Explore What the Patron Needs Before Answering

Ask clarifying questions:

1. What types of sources are you looking for? (articles, books, encyclopedia, Internet, etc.)

2. Are you working on a class project? May I see the assignment?

3. How much information do you need? (How many pages is your paper?)

4. Where have you looked so far? What searches have you already tried?

5. Listen to the entire question. Do not jump to conclusions.

6. Repeat and rephrase to ensure that you understand. “So you need to find books on the Russian Revolution, right?”

B.2.3. Include the Patron in the Process

1. Be certain the patron understands what you are doing for him/her. Narrate as you think and type, explaining what you are doing and why.

2. Assist patrons at the public workstations rather than remaining behind the desk. Encourage the patron to log on to the workstation themselves. Have them do the typing, while you guide them.

B.2.4. Consult Multiple Sources

1. Brainstorm a variety of possible sources. Consider how article databases, subject encyclopedias, subject guides, and Web sites may be helpful. Write sources down as you think of them. Convey the range of options to the patron, and help them get started. Provide a written list of resources to the patron for future consultation.

2. Remember the subject guides on the Web, and resources in other subject libraries. Explore resources in libraries outside Penn State (e.g. WorldCat).

B.2.5. Navigating the Floor/building

1. Get up from behind the desk and walk with patrons, rather than pointing out locations.

2. Direct patrons to the side stairs of the stacks, rather than the central “core” stairs, if their call number warrants this.

B.2.6. Referrals

1. Inform patrons of the availability of subject specialists. Assist patrons needing additional expertise in sending an e-mail to the appropriate subject specialist.

2. Avoid hasty referrals to other locations. Call ahead to the other location to make certain they have what is needed and will be expecting the patron.

3. Note interesting or difficult questions in the topic column of the Reference Statistics sheet, or in the desk notebook.

B.2.7. Follow-up With the Patrons

Use questions/comments such as:

1. Does this answer your question? Does this look like what you need?

2. Please be sure to let me know if you do not find what you need. I will be here at this desk.

3. Please come back if you don’t find what you need, and we will try other sources.

4. If this turns out not to be what you were looking for, let me know. We have many other resources and librarians who are experts in this area. I can get help from them if needed.

5. When possible, approach patrons as they leave. Ask if they have found everything they need.

NOTES AND REFERENCES


9. Ibid.

10. For additional details see the WOREP Web Site, http://worep.library.kent.edu/index.html.


