🚫 Let's Never Do This Again 🚫
How a large-scale project led us to re-think chat reference assessment at University of Washington Libraries

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2015-2016 Chat Assessment Project

Process

3721 (one academic quarter) chat transcripts coded for:
- Reference Effort Assessment Data (READ) scale
- Demographic information, ebooks, selected subjects
- Examined post-chat survey comments
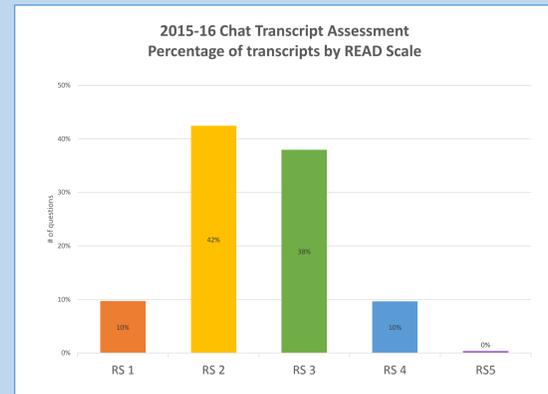- Team discussion about observed themes

2015-16 Chat Transcript Assessment
Percentage of transcripts by READ Scale

Challenges
- Demographic information hard to discern
- Unwieldy format of chat transcripts - couldn't use analysis software but coded in individual batches using Excel
- Process was lengthy – over 1 year to complete

Findings
- Patrons DO ask complex questions in chat! Concrete data helped convince skeptical library staff
- Data regarding question subjects/patron affiliation resulted in more staff participating in chat
- Chat transcripts are a rich source of patron data relevant to many library stakeholders

Following the final report, the Online Reference Services Coordinator & Director of Assessment visited various UW Libraries groups to show how chat transcripts could reveal more about patron behavior & experiences.

Ongoing Use of Transcripts Across UW

LMS/Usability
- Following an early 2017 update of the ILS at UW Libraries, users and staff observed problems with item requests, but these were dismissed as outliers by the vendor
- Online reference staff tracked patron reports of request problems for 1 month, tagging relevant emails/chats = 32 instances
- Data and transcripts used to document that problem was pervasive, resulting in a software fix by the vendor

Ebooks/Usability
- Collection librarian used chat transcripts to illustrate the struggles patrons and librarians experience with ebooks at a presentation at the 2018 Electronic Resources & Libraries Conference. Her dramatic reading of a 58 minute chat session in which a librarian tries to help a student download an ebook led to a lively discussion of the barriers DRM presents to library users

## 2017 Interlibrary Loan Questions Project

Process

157 chat transcripts posing questions about ILL services coded based on categories that emerged from the data:
- Known item that cannot be found online or physically in the library
- Questions about ILL policy (who can use it, cost) & process
- Feedback about ILL product (poor scan, delays)

Categories Assigned to Chat Transcripts

Findings
- Patrons are confused about how to get items not readily available & unaware of ILL services (54% of questions coded were for known items)
- Variance in terminology between consortial borrowing and ILL options also confusing
- Using consistent language in chat for ILL borrowing may help patrons
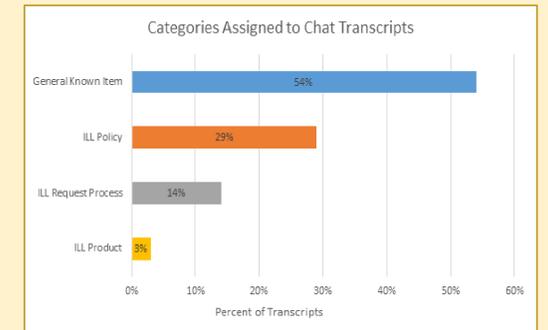
2018 Chat Patron Interview Project

Process

128 patrons invited to participate in interviews about their recent chat reference interaction. 11 accepted; 10 were interviewed.
- Exploratory design: broad goals were to learn more about patron expectations of and satisfaction with chat service
- Mix of students & faculty/staff interviewed online over 3 week period
- Initial lack of response to invitation led us to offer a $20 gift card as compensation
- 1 librarian working remotely coordinated interviews, in collaboration with team

Findings
- Most interviewees weren't sure what to expect when they used the service but used it to solve immediate need
- Interviewees discovered chat link on website, hadn't learned about it elsewhere
- Patrons appreciate speed and efficacy of chat reference
- Patrons either did not notice or didn't mind when they were chatting with a librarian outside of UW

Reflections & Future Projects

- While our initial chat assessment was overly ambitious, it established that UW patrons are using the service extensively, for complex needs. Findings sparked awareness across the Libraries about how chat transcripts surface patron needs & behaviors – project was a "necessary evil"
- Transcripts continue to be used to document usability issues in our evolving discovery system
- The assessment team plans to explore focus groups next to dig deeper into patron expectations in chat

Final reports & documentation available at: https://tinyurl.com/chatlac18