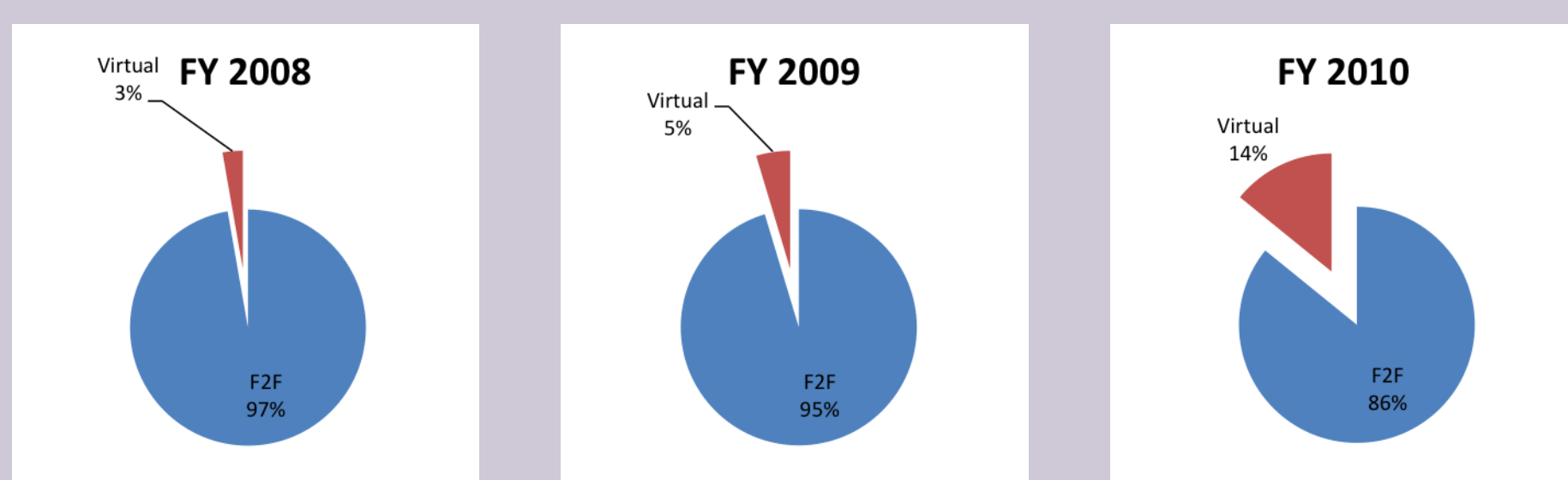


Questions of Quality & Staffing Patterns in IM Reference: Assessment Driven Best Practices

Introduction

Instant messaging (IM) is a growing venue for reference questions. Previous research of the IM reference patterns at Albert S. Cook Library show that a third of IM reference questions are research questions. And in comparison to face-to-face reference encounters, there are fewer directional and more ready reference questions, which primarily concern citations. Due to this growing reference avenue, the high number of research questions, the availability of chat transcripts, and the frustrations sometimes voiced by those answering IM, quality assessment was undertaken to identify any areas of this popular and successful venue that may need to be addressed.

Virtual Reference Expands



In just two years (from 2008 to 2010), reference questions received virtually have nearly quintupled.

Background

RUSA Guidelines for the Implementing and Maintaining Virtual Reference call for the regular assessment of virtual reference programs. Librarians (Ronan, Reakes & Ochoa, 2006; Zhou, Love & Norwood 2006) who have evaluated quality of IM reference have used a series of yes and no questions based upon RUSA's Guidelines for Behavioral Performance. Radford and Connaway (2006, 2007, 2009, 2011) have conducted a variety of studies that look at individual components of IM reference behavior, including several studies on approachability and the reference interview. Passoneau and Coffey (2011) as well as Desai and Graves (2008) have looked exclusively at teaching and learning through IM. Arnold and Kaske (2005) read transcripts to determine correctness and completeness of chat transcripts. Because IM reference transactions can be easily tracked, they are a rich source for library research and assessment.

Research Questions

- Do IM reference questions answered by librarians off the reference desk provide a better quality of service than those at the desk?
- Do IM reference questions answered by librarians during the day provide a better quality of service than those at the desk or at night?
- What's best about Cook Library's IM reference service? What could stand a little improvement?

Amanda Youngbar

Library Associate for Learning Commons
Towson University
ayoungbar@towson.edu

Melissa D'Agostino

Evening Research & Instruction Librarian
Towson University
mravely@towson.edu

Patricia MacDonald

Associate University Librarian for Administrative Purposes
Towson University
pmacdonald@towson.edu

Method

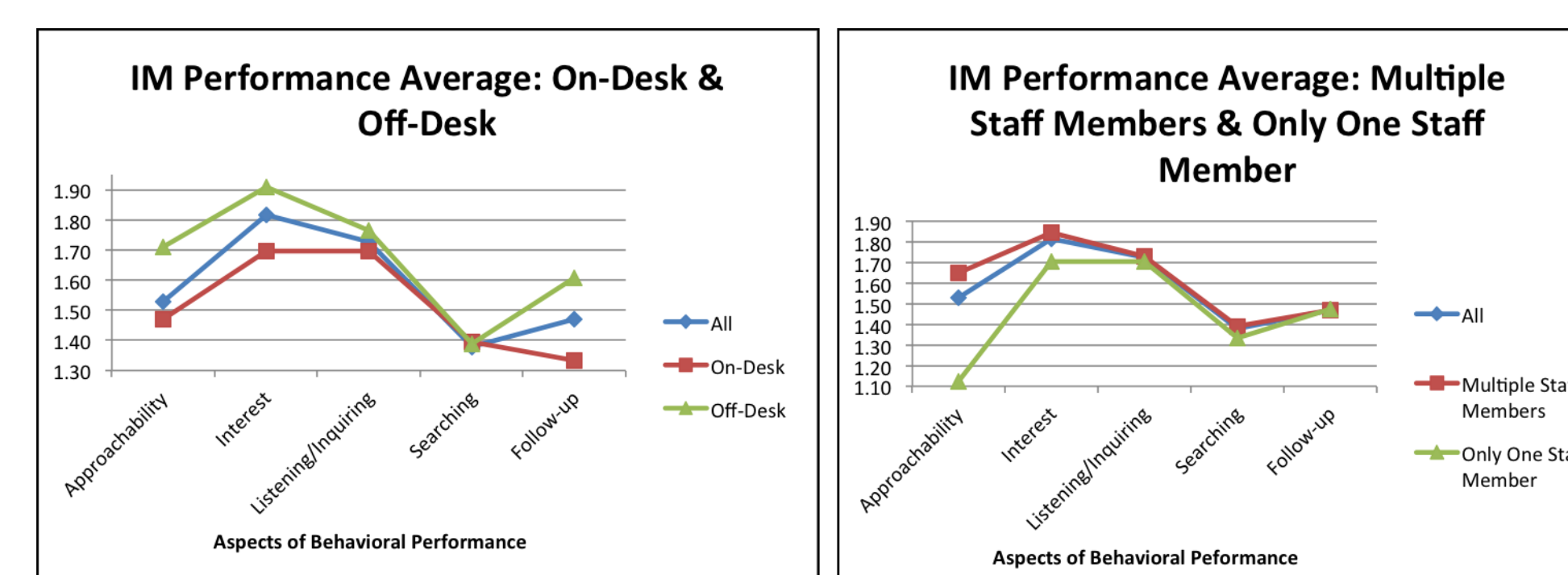
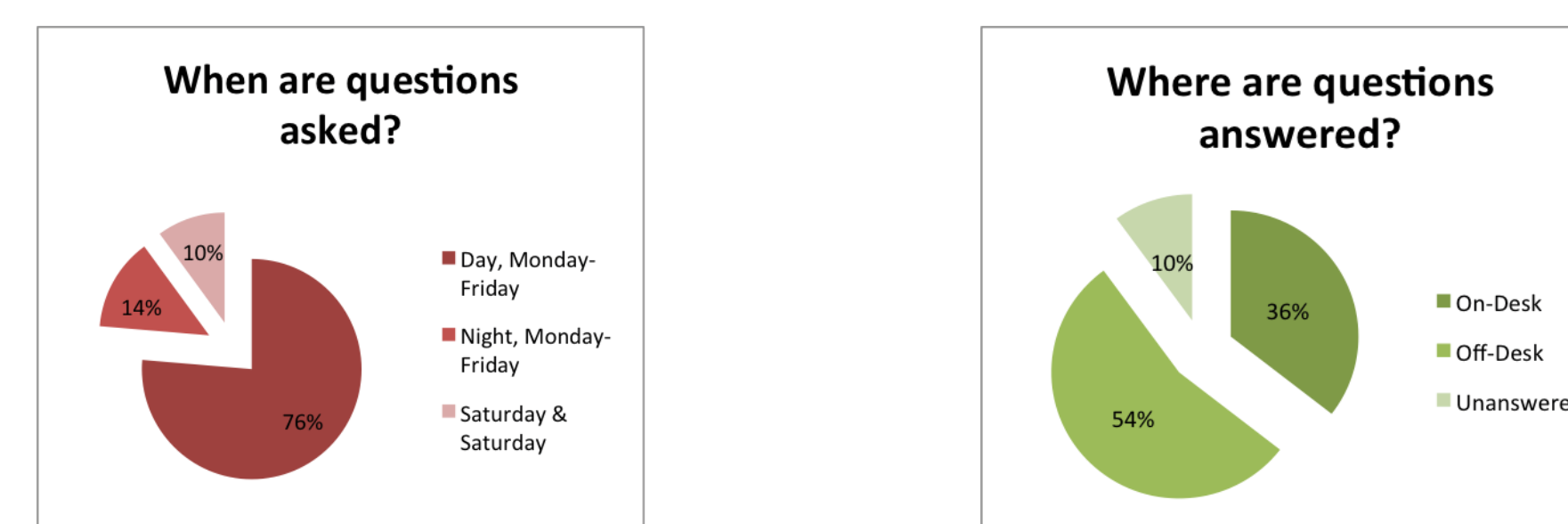
Three staff members who provide reference service rated an anonymous random sample of IM transactions from Spring 2011 using a rubric they adapted from the five areas covered in RUSA's Guidelines for Behavioral Performance of Reference and Information Service Providers: approachability, interest, listening/inquiring, searching, and follow-up. Using a rubric provided greater granularity than simply asking yes-or-no questions. Each area was rated on a scale of 0-2, where 0 was inadequate, 1 was adequate, and 2 was superior. Identifying user and librarian information was stripped from the IM transaction log sample prior to evaluation. Initially, the three staff member researchers rated transaction logs as a group to develop the rubric and build consensus in coding. Next the researchers rated transaction logs individually, but compared their ratings as a group to develop and ensure inter-coder reliability. After this norming stage, the researchers divided and rated the remaining IM logs independently.

IM Reference Assessment Rubric

Component	Rating	Measures
Approachability	0	<ul style="list-style-type: none"> No response. Responds quickly, but without greeting. Very delayed response.
	1	<ul style="list-style-type: none"> Responds, but if a specific librarian has been requested, does not immediately clarify that said librarian has not been reached or is not available. Responds, but leaves with no or only a vague explanation without transferring IM to another librarian. Transfers IM with little or no explanation.
	2	<ul style="list-style-type: none"> Responds quickly with greeting and interaction is jargon-free. Responds, but if a specific librarian has been requested, immediately clarifies that said librarian has not been reached or is not available and offers research help & instruction as appropriate.
Interest	0	<ul style="list-style-type: none"> No response. Manner and tone curt and/or abrupt. Very delayed response.
	1	<ul style="list-style-type: none"> Mixed manner and tone. Use of engaging, supportive, and encouraging statements, such as "interesting topic," "awesome," and use of smile icons.
	2	<ul style="list-style-type: none"> Manner and tone warm and/or professional. Chat shorthand, acronyms, abbreviations, and lingo are acceptable.
Listening/Inquiring	0	<ul style="list-style-type: none"> Asks no open, closed, or clarifying questions.
	1	<ul style="list-style-type: none"> Asks some open, closed, and clarifying questions, but not enough. User elicits further information when librarian doesn't ask enough questions or when librarian returns results that are not appropriate or in line with user request.
	2	<ul style="list-style-type: none"> Asks a combination of open, closed, and clarifying questions as appropriate. Ready reference questions may not require clarification. Instruction not offered or provided when it seems necessary.
Searching	0	<ul style="list-style-type: none"> Suggested resources not appropriate. Provides misinformation. Provides too much, too little, or extraneous information.
	1	<ul style="list-style-type: none"> Provides appropriate resources, but does not offer or provide instruction or provides instruction too quickly or unclearly.
	2	<ul style="list-style-type: none"> Provides appropriate resources and instruction. Does not ask follow-up questions, i.e. "Is there anything else?" or "Does that help?" Does not say you're welcome in response to thank you. Does not say goodbye in response to user. Does not encourage user to return and use the service again if needed. Questions not referred as appropriate to subject liaisons, other departments, other offices on campus, or other libraries. Questions are not referred in a professional manner.
Follow-up ¹	0	<ul style="list-style-type: none"> Questions are not referred in a professional manner. Provides some aspects of follow-up, but not all. Asks appropriate follow-up questions, i.e. "Is there anything else?" or "Does that help?" Says you're welcome in response to thank you. Says goodbye in response to user. Encourages user to return to service if needed. Questions referred as appropriate to subject liaisons, other departments, other offices on campus, or other libraries. Questions are referred in a professional manner.
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	2	<ul style="list-style-type: none"> Provides some aspects of follow-up, but not all. Asks appropriate follow-up questions, i.e. "Is there anything else?" or "Does that help?" Says you're welcome in response to thank you. Says goodbye in response to user. Encourages user to return to service if needed. Questions referred as appropriate to subject liaisons, other departments, other offices on campus, or other libraries. Questions are referred in a professional manner.

Averages were calculated for the overall quality of transactions, as well as the quality of specific areas at different points of access. Additionally, percentages were calculated to allow comparison among different aspects and points-of-service. The results show that IM transactions off the reference desk and during the day provide a better quality of service than those at the desk or at night.

Results



Ratings for Aspects of Behavioral Performance by Timespace

Timespace?	Rating	Approach	Interest	Listening	Searching	Follow-up
All	2	60%	85%	75%	42%	57%
	1	33%	12%	23%	53%	33%
	0	7%	3%	2%	4%	10%
On-Desk	2	49%	76%	70%	47%	44%
	1	49%	17%	30%	47%	46%
	0	2%	7%	0%	7%	10%
Off-Desk	2	72%	91%	79%	40%	67%
	1	27%	9%	18%	58%	26%
	0	1%	0%	3%	1%	7%
Day until 6 PM, Mon.-Fri.	2	70%	87%	76%	43%	57%
	1	26%	11%	21%	52%	33%
	0	5%	2%	3%	4%	10%
Night after 6 PM, Mon.-Fri.	2	33%	81%	81%	21%	57%
	1	61%	13%	19%	71%	36%
	0	6%	6%	0%	7%	7%
Saturday & Sunday	2	20%	73%	55%	60%	57%
	1	53%	18%	45%	40%	29%
	0	27%	9%	0%	0%	14%
Only One Librarian	2	27%	78%	70%	38%	57%
	1	58%	15%	30%	58%	33%
	0	15%	7%	0%	4%	10%

Additional Timespace Details

- Day until 6 PM, Mon.-Fri.: Multiple librarians on duty.
- Night after 6 PM, Mon.-Fri.: Only one librarian on duty.
- Saturday & Sunday: Only one librarian on duty. Much smaller sample size
- Only One Staff Librarian: Combined results of Night after 6 PM, Mon.-Fri. and Saturday & Sunday.

Discussion

The results, while not necessarily unique, do support similar research in this area. What is unique about this study is the use of a rubric. This allows for a more granular assessment of the service as opposed to simple yes-or-no checklists. With this greater level of granularity, areas of improvement can be more easily identified. By and large, it is more likely for an aspect of reference behavioral performance to be incomplete, rather than completely overlooked. This rubric and methodology could be adapted for local assessment allowing examination of local staffing patterns and service quality. The use of RUSA's Guidelines for Behavioral Performance allows for comparisons across libraries and is a framework easily recognizable and understandable for the library community.

Limitations

Our category for searching was in actuality comprised of two different values: use of appropriate resources as well as instruction. This could very well account for the lower performance identified in this area. Future researchers using this model may want to parse out these two different aspects of searching performance.

Conclusion

Assessment of IM reference using a rubric has allowed Albert S. Cook Library to pinpoint strengths and weaknesses of this virtual reference program, enabling librarians to identify and develop practices that are best suited to this service. This gives librarians the confidence to continue successful practices and improve those that are more tenuous. This type of assessment program could be used to evaluate IM reference service at other institutions as well as new services implemented using emerging technologies.

References

References available upon request.

