

An Alternative to Recording Hash Marks

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READ (Reference Effort Assessment Data) Scale ©

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READ Scale Research Web Site: <http://sites.google.com/site/bkarrgerlich/>

1 - Answers that require the least amount of effort

No specialized knowledge skills or expertise; No consultation of resources; Less than 5 minutes.

Examples:

Directional inquiries; Library or service hours; Service point locations

2 - Rudimentary machine assistance

Answers given which require more effort; Require only minimal specific knowledge skills or expertise;

Answers may need nominal resource consultation.

Examples:

Call number inquiries; Item location; Minor machine & computer equipment assistance; General library or policy information; Locating/using copiers; How to print; Supplying paper;

3 - More complex machine assistance, ready reference

Answers in this category require some effort and time; Consultation of ready reference resource materials is needed; Minimal instruction of the user may be required; Reference knowledge and skills come into play.

Examples:

Answers that require specific reference resources (encyclopedias or databases); Basic instruction on searching the online catalog; Direction to relevant subject databases; Introduction to web searching for a certain item; How to scan and save images; How to save to a disk or email records; Launching programs or re-booting

4 - Increasingly complex technical problems.

Answers or research requests require the consultation of multiple resources; Subject specialists may need to be consulted and more thorough instruction and assistance occurs; Reference knowledge and skills needed; Efforts can be more supportive in nature for the user, or if searching for a finite answer, difficult to find; Exchanges can be more instruction based as staffs teach users more in-depth research skills.

Examples:

Instructing users how to utilize complex search techniques for the online catalog, databases and the web; How to cross-reference resources and track related supporting materials; Services outside of reference become utilized (ILL, Tech services, etc), collegial consultation; Assistance with remote use

5 - Assisting users in focusing or broadening searches.

More substantial effort and time spent assisting with research and finding information; On the high end of the scale, subject specialists need to be consulted; Consultation appointments with individuals might be scheduled; Efforts are cooperative in nature, between the user and librarian and or working with colleagues; Multiple resources used; Research, reference knowledge and skills needed; Dialogue between the user and librarian may take on a 'back and forth question' dimension.

Examples:

False leads; Interdisciplinary consultations / research; Question evolution; Expanding searches / resources beyond those locally available; Graduate research; Helping to re-define or clarify a topic

6 - Difficult outreach problems.

The most effort and time expended; Inquiries or requests for information can't be answered on the spot; At this level, staff may be providing in-depth research and services for specific needs of the clients; This category covers some 'special library' type research services; Primary (original documents) and secondary resource materials may be used.

Examples:

Creating bibliographies and bibliographic education; In-depth faculty and PhD student research; Relaying specific answers and supplying supporting materials for publication, exhibits etc; Working with outside vendors; Collaboration and on-going research; Access issues that need to be investigated)

Reference Statistics Resources - Selected Bibliography

Applegate, Rachel. *Whose Decline? Which Academic Libraries are "Deserted" in Terms of Reference Transactions* Reference and User Services Quarterly, 48(2): 2008. pp. 176-189

Reference statistics converted to ratios: per student and per librarian

Gerlich, Bella Karr and G. Lynn Berard. *Introducing the READ Scale: Qualitative Statistics for Academic Reference Services*. Georgia Library Quarterly, 43(4): Winter 2007. pp. 7-13

Høivik, Tord. *Why do you ask? Reference statistics for library planning*. Paper for IFLA Statistics section, Glasgow, 2002. Retrieved October 27, 2009 from: <http://home.hio.no/~tord/perm/pub/co01.htm>

Detailed series of pages with interesting insights into how a librarian might classify questions (orientation, basic reference, professional reference), analyze the data (questions per inhabitant, per visit, per employee, transaction times) and ideas on how to look at demand (school projects, hobbies, genealogy, etc.)

Lochstet, Gwenn and Donna H. Lehman. *A Correlation Method for Collecting Reference Statistics*. College and Research Libraries, 60(1): January 1999. pp. 45-53

Describes a method of calculating weekly reference question estimates from door counts.

Smith, Michael M. *A Tool for All Places: A Web-Based Reference Statistics System*. Reference Services Review, 34(2): 2006. pp. 298-315

Describes development and results of web based statistics collection system. Good summary of issues with reference statistics purpose, and problems collecting; good bibliography and literature review.

Warner, Debra G. *A New Classification for Reference Statistics*. Reference and User Services Quarterly, 41(1): Fall, 2001. pp. 51-55

Proposes tracking questions via a four point scale: level 1 – non-resource based, level 2 – skill-based, level 3 – strategy-based, level 4 – consultation.

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