

# Coding Reference: An Analytical Approach to Assessment

1 year 2,600 hours staffed 2,400 reference transactions 18 librarians

\$72,800 spent **59% of service used as-designed**

## 1. Two-Tiered Service Model

Info Desk refers patron to librarian

Patron meets with librarian

Librarian works with patron in reference consultation

Reference consultation conclusion

Librarian documents question and answer in Springshare RefAnalytics

Librarian assigns READ Scale rating to the question

### Information Desk

**17,000 questions/year**

Staffed by graduate students  
Handles basic library use questions (READ Scale 1-2)

*Ex: Where do I find Pride and Prejudice?*

### Research Consultation Office

**2,400 questions/year**

Staffed by librarians  
Handles research questions, often in-depth (READ Scale 3-6)

*Ex: Can you help me with a literary criticism paper on Jane Austen?*

## 4. Coding

Associate data, create metadata

Use NVivo to code reference questions from a spreadsheet based upon themes

### Auto-Code Descriptive Data

Patron Type	0	0
Summer Programs	1	10
Alumni	1	37
blank	1	51
Faculty/Staff	1	118
Non-affiliate	1	207
Graduate	1	259

READ Scale	0	0
1	1	88
2	1	354
3	1	442
4	1	112
5	1	28
6	0	0

### Manually Code Themes

Name	Sources	References
Tech	1	190
Support	1	237
Search Type	1	937
Known Item	1	296
Peer Reviewed	1	13
Author	1	27
Subject	1	601
Research Services	1	127
Profile	1	70
Library Department	1	96
Format	1	1081
Photo or Image	1	24
Online Resource	1	245
Newspaper or Periodical	1	56
Manuscript	1	1
Journal	1	75
e-Book	1	32
Dissertation	1	28
Book	1	313
AV	1	15
Article	1	252
Fact Machine & Referrals	1	100

## 5. Analysis

Identify patterns using queries

	A: 6	B: 5	C: 4	D: 3	E: 2	F: 1
1: Tech	0	2	2	43	41	15
2: Support	0	0	1	10	80	39
3: Subject	0	15	84	205	43	4
4: Peer Reviewed	0	0	1	6	1	0
5: Known Item	0	3	8	67	89	3
6: Author	0	1	5	12	2	0
7: Research Services	0	0	1	41	20	4
8: Special Collections	0	1	2	2	7	3
9: ILL EE	0	0	1	6	19	2
10: GIS and Data	0	0	0	1	1	0
11: e-Reserves	0	0	1	2	0	2
12: Archives	0	0	1	7	4	3
13: Photo or Image	0	0	6	83	39	5
14: Online Resource	0	1	4	16	15	1
15: Newspaper or Periodical	0	0	0	0	0	0
16: Manuscript	0	0	1	23	18	0
17: Journal	0	0	3	7	11	1
18: e-Book	0	0	1	5	7	0
19: Dissertation	0	2	13	70	92	11
20: Book	0	0	0	2	9	0
21: AV	0	2	26	101	32	0
22: Article	0	1	3	12	23	17
23: Fact Machine & Referrals	0	0	0	0	0	0

Auto-code descriptive data (READ, patron profile information, date/time)

Execute matrix queries using NVivo to explore data in different ways

Co-view data with colleagues to identify patterns and themes that relate to their work



The Sheridan Libraries  
Johns Hopkins University

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Margaret Burri Associate Director, Sheridan Libraries

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Steven Heslip Director, User Experience

Ellen Keith Current Director of Research & Access, Chicago History Museum

...and the Research Consultation Librarians

## 2. READ Scale

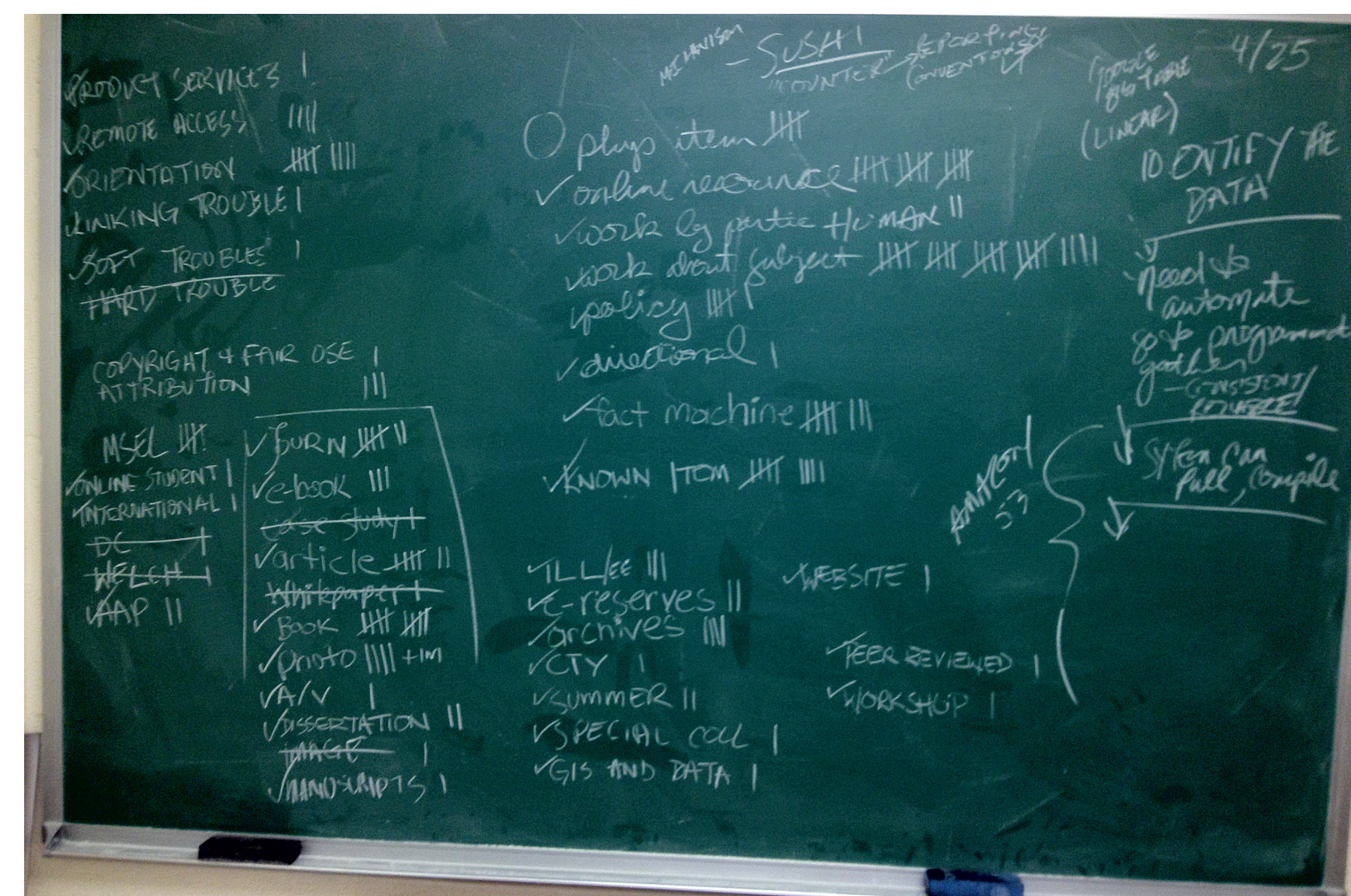
Rate patron questions

- Requires no specialized knowledge, skills or expertise
- Requires minimal library knowledge, skills or expertise
- Requires instruction and/or use of catalog, database or book
- Requires multiple sources, in-depth research skills. Subject specialist may be needed
- Subject specialist needed. Likely requiring consultation appointment with less well-known resources
- Most intellectual effort expended. In-depth research and services, likely involving primary sources. Unlikely answered on the spot

\*The READ Scale was created by Bella Karr Gerlich, Ph.D.

## 3. Sorting

Identify & organize themes of patron questions



## 6. Findings and Implications

### • Service as Intended?

Librarians were surprised that 41% of reference questions were READ 1's and 2's, when these questions can be handled by the Information Desk.

Service to Non-Affiliates represent approximately 20% of documented use.

Librarians are frequently serving as "Fact Machines," IT support, and catch-all overflow while in the Reference Office.

### • Evolving Service Model

Expanded Information Desk staffing during peak hours may help to more-effectively screen questions to support reference service as intended.

### • Broader Implications?

25% of documented questions concern "Subject Search." Can we work across departments to make this easier for patrons?

At least 50% of patron questions concern printed materials. Does this have implications for collection development?