

Updating Reference Services Statistics Collection Techniques for the 21st Century



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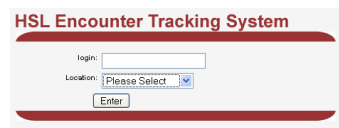
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Objective

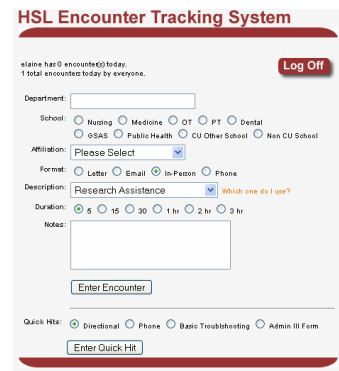
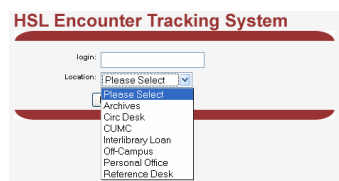
To illustrate how updating the method of statistics taking at an academic medical center's library to one of higher temporal and demographic resolution of information [by adopting a business style IT solution] may better serve its reference department in analyzing user needs and in evaluating reference services.

Methods

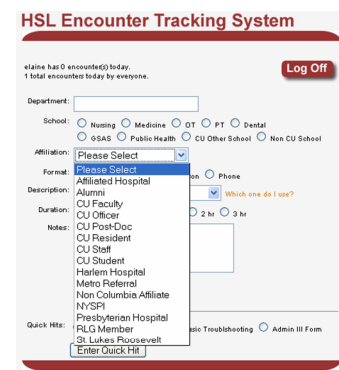
To facilitate the taking of more informative and comprehensive statistics, our institution's web librarian developed a web-based database tool, inspired by traditional IT support tracking systems.



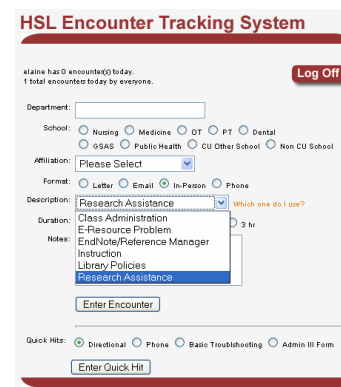
This tool is a data-driven web site* programmed using Cold Fusion and MS SQL Server. An easy to use web browser interface allowed Librarians to log in and identify themselves from a number of physical locations (both on & off campus, inside the library and elsewhere at the Med Center campus), when entering data.



Built on a business model - this new "Patron Encounter Tracking System" facilitates: the counting of every patron encounter; the gathering of demographic information [department/ school and affiliation/status] about the patron; and the documenting of the length and nature of the encounter - similar to the degree of tracking one would require if the service were to be billed. During a four-month period, reference librarians were required to enter information about every reference transaction using this system.



Librarians worked together to update the classification of question types to reflect the new roles of reference librarians (eg. tech support for bibliographic citation management software programs like *Endnote*). For less-involved, directional-type questions, a "Quick Hits" section was added to the bottom of the form.



Parallel to this method of data collection, a traditional (print) statistics sheet was also used to collect reference statistics on a sampling basis, during a pre-designated one week period, once per month.

Results

The biggest obstacle faced in this project was the low level of initial librarian buy-in to the Encounter System (ES). Only half of the librarians on staff were conscientious about using the ES on a daily basis & from all locations. As a result, the total number of recorded reference inquiries was higher using the traditional (print) sampling sheet method.

Sample data analysis using ES:

Of the 1262 inquiries which were recorded using the ES over a four-month period, 60% involved research assistance or instruction. It took 105 librarian reference hours to answer these inquiries, 41 hrs of which were spent with students, 24hrs with medical students specifically.

Discussion

ES improves on the old way...

1. Allows for data collection from various locations; perfect for today's "roving", satellite, & telecommuting reference models
2. Librarians can provide an estimate of the length/duration of the transaction; ideal for documenting the increased time spent with patrons on instruction, e-resource troubleshooting, tech support, etc.
3. Records the date and time when the data was entered; useful for determining when the busiest reference hours are and who is best suited for answering the types of questions that are coming at different times of day
4. Identifies staff member doing the data entry; great for keeping track of staff productivity
5. Records the format in which the inquiry was received by the library; information which becomes more valuable as libraries struggle with pressures to reduce their physical space when faced with the argument that patrons no longer seek face-to face reference services
6. Classifies questions into updated categories; as the roles of librarians change, so should the categories if they are to reflect the types of questions asked by patrons today
7. Gathers demographic information about the patron (affiliation/status, program, dept.); useful for determining how best to take advantage of staff expertise and to more strategically target outreach efforts

Conclusions

ES facilitates statistics-taking and analysis. Preliminary ES data demonstrated its potential to inform operational improvements and to answer management-type questions (percentage of inquiries that paraprofessionals could handle, reference hours spent per School, etc). Data entries are not made automatically, however - its success, therefore, depends largely on the degree of commitment made by librarians to use it.

Future Directions

- Use data gathered to inform decision-making concerning librarian and/or paraprofessional staffing levels, reference desk hours of operation, etc.
- Streamline user interface to minimize time/effort spent inputting reference encounter information – automating the process as much as possible (eg. using card readers to collect patron demographic information, etc.)
- Implement staff training to motivate staff to keep statistics more consistently and then rigorously evaluate the tool for accuracy.

References

- Warner, D.G. A new classification for reference statistics [at East Carolina University]. *Reference & User Services Quarterly* v. 41 no. 1 (Fall 2001) p. 51-5
- Cardina, C., et. al., The Changing Roles of Academic Reference Librarians Over a Ten-Year Period. *Reference & User Services Quarterly* v. 44 no. 2 (Winter 2004) p. 133-42

*(MS Server 2000/HTML, Cold Fusion Server 5, MS SQL Server 2000)