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A new life for the READ Scale: Calibrating a time and effort measure for patron interactions

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Introduction

Service statistics are a basic form of library assessment, but they can help tell complex and compelling stories about how we interact with our patrons. As a measure of effort, they can also help with decision-making for the services themselves, e.g., staffing or hours. The addition of the READ Scale can augment statistics collection as a relatively easy to implement and use qualitative measure.

VCU Libraries adopted the READ Scale in 2015 based on its potential to tell us more about our patron interactions. Virginia Commonwealth University (VCU) is a large, public research university with an enrollment of 28,919 students across 14 schools and colleges (Virginia Commonwealth University, 2022). It is vital to have rich data to understand how to best meet the research and learning needs of this diverse and dynamic community. This is especially important given the constraints imposed by increasingly uncertain budget conditions.

The incorporation of the READ Scale at VCU Libraries happened in the context of a library-wide transition to a new statistics management platform, LibAnswers from SpringShare, that offered READ Scale integration as a feature. Cabell Library, one of two libraries supporting VCU in Richmond, Virginia, had also recently implemented a tiered model for the newly consolidated main service desk that was, at least, in part influenced by the levels of service described in the READ Scale (Gariepy et al., 2015).

The READ Scale served us well for the next four years, even through a move to another statistics form, this time in LibInsight also from SpringShare. However, leadership from the three departments involved in the aforementioned tiered point-of-need service started to notice inconsistencies in scores at a time when we were heavily relying on them to evaluate our service model. There were many changes in personnel and leadership that likely contributed, but there was also evidence that the original READ Scale was no longer as relevant and was causing confusion based on the questions we were receiving. To ease frustration and ensure more accurate data for decision-making, we brought the three departments together to breathe new life into our READ Scale. This case study details the process that allowed us to work together to align our understanding of the READ Scale, update it to resonate with current and local practice, and ultimately improve our statistics.

The READ Scale

Many libraries capture quantitative data about their reference transactions, such as counts and dates/times. Such data is important for recording and predicting when and with what frequency reference questions tend to be asked. However, this data falls short of capturing the nature of each interaction. Was the question quickly answered, requiring no expertise? Did it require patron instruction? Or did it necessitate extensive preparation and follow-up?

The READ (Reference Effort Assessment Data) Scale was created to address this gap. Developed by Dr. Bella Karr Gerlich in 2003, it "is a six-point scale tool for recording vital supplemental qualitative statistics gathered when reference librarians assist patrons with their inquiries or research-related activities by placing an emphasis on recording the effort, skills, knowledge, teaching moment, techniques and tools utilized by the librarian during a reference transaction" (Gerlich, no date). Each point on the scale is described in terms of the amount of time and effort required,

whether resources or subject specialists needed to be consulted, and the extent to which instruction of the patron is required. Example patron interactions are also provided for each scale. A question about library building hours would be scored a 1 on the READ Scale, for example, while creating a bibliography would be scored a 6. READ Scale descriptions and examples are applicable to most library types and patrons. The few exceptions ("graduate research" and "in-depth faculty and PhD student research" are listed as examples for the 5 and 6 scores, respectively) are logical inclusions given the complexity and time-consuming nature of graduate and faculty research (Gerlich, no date).

Many libraries use forms — whether through a vendor-created product like LibInsight or a homegrown Google form — to record reference transactions (see Appendix A for an example from VCU Libraries). An additional item on the form asking library employees to score the interaction on the READ Scale requires little additional effort on the part of the employee while providing a wealth of information that can be used to adjust service hours and staffing (Gerlich and Berard, 2007; Gerlich and Berard, 2010). For example, VCU's Cabell Library transformed its on-call librarian service from a scheduled to unscheduled model when READ Scale data indicated that relatively few 4-, 5-, and 6-level questions were being received via the library's service points. This service transformation freed up time for librarians, no longer tied to their desks, to do outreach around campus without significantly impacting customer service at our service points. READ Scale data can also be crosstabbed with other reference form data to inform outreach and education efforts. An academic library might collect both READ Scale data and the patron's school, for instance. For example, the analysis might show that most 4- and 5-level questions are received from the School of the Arts during a particular two-week period, pinpointing an optimal opportunity for instruction or for furnishing an instrument, such as a research guide.

Literature Review

The READ Scale is relatively well-known to academic libraries in the United States, so much so that it has been integrated into statistics management platforms, e.g., SpringShare (2012) and Desk Tracker (Compendium Library Services, no date). Its ongoing value is touted in the literature (Warner and Hurley, 2021). However, this value is, in many cases, predicated on revisions to the scale to meet local needs.

Warner and Hurley (2021) found five examples of adjustments as part of their literature review exploring the use of the READ Scale for scoring chat interactions. While their recommendation that libraries should "examine and update the definitions and examples of each level of the READ Scale" is focused on delivery methods (no pagination), it speaks to the need to keep the scale relevant to local contexts and practices.

READ Scale modifications in the literature, including the aforementioned examples, focus on changes to the number of levels and/or the descriptions attached to those levels. Some dropped level 6 and/or added a 0 (Belanger et al., 2012; Keyes and Dworak, 2017; Kohler, 2017; Vassady et al., 2015), with rationale offered only by Kohler (2017), who described adding a 0 score to account for dropped, demonstration, or "odd" chats. There have also been various additions and customizations to the descriptive information. Labels were added for each level, e.g., "directional" or "quick and easy" for level 1 (Bowron and Weber, 2017; Vassady et al., 2015). Definitions and examples have been expanded or customized (Stieve and Wallace, 2018; Vassady et al., 2015). In a similar vein, Kayongo and Van Jacob (2011) added 25 subcategories across the six levels.

The context for modifications of descriptive information is generally expressed simply as a need to adapt for specific library contexts (Kayongo and Van Jacob, 2011; Stieve and Wallace, 2018). Bowron and Weber (2017) were more specific, citing the need to help employees with the

transition from a previous statistics collection system and make it easier to use. They also highlighted the need for a participatory process when making these types of decisions, as "participation by the entire group gave them a strong understanding of how the skill level, resources used, and time taken to answer a question may determine the appropriate category to use when classifying a reference transaction" (Bowron and Weber, 2017, p. 52). Vassady et al. (2015) also indicated that their library's use of a norming exercise, to achieve agreement on and consistency for scores, led to READ Scale revisions.

While the literature is scant, it offers valuable guidance for those considering local changes to make the READ Scale more relevant and easier to use. In addition to supporting the need for an ongoing update, incorporating rating calibration and a participatory process is vital for achieving a group understanding of how to apply the READ Scale for accurate and meaningful statistics reporting.

Calibration and adaptation workshop
The tiered service model employed by Cabell Library relies on three departments: Access Services, Student Success, and Academic Outreach. Access Services is a frontline information and access services department. Student Success is composed of generalist librarians working primarily with first- and second-year undergraduates. Academic Outreach is a department of subject specialist librarians working most frequently with upper-level undergraduate and graduate students and faculty in a wide variety of disciplines. While they all contribute to a service that, together, supports patrons at their point-of-need, the departments' work is very different. As such, the department leadership, including the two authors of this paper, meets regularly to ensure successful collaboration, and in January 2019, started to explore a READ Scale refresh.

Some possible anomalies in the patron interaction statistics prompted the discussion. There seemed to be too many transactions scored at the end

points of the scale, i.e., 1 and 6. There also was evidence of both overscoring and underscoring. For example, the number of interactions scored as a 3 did not seem to be reflective of the work we knew was being done by Access Services at the desk or in chat. Furthermore, some of the definitions and examples were dated and/or not reflective of local experience. "How to save to a disk," an example mentioned for a READ score of 2, was no longer relevant for a campus using the Google suite or citation management tools. The use of "primary (original documents) and secondary resource materials," assigned a READ score of 6, now required less time and effort, due to increasing online availability and improvements in search tools. A READ score of 5,4, or even 3 would be more accurate. These are just a few examples that came up when employees were struggling to determine READ scores. The aforementioned leadership team wanted to address these challenges in order to ease frustrations and build overall confidence in score accuracy. We decided to hold a workshop that would allow the departments to meet and work together to create a solution.

Invitations to the workshop were sent to all employees from the three departments. Everyone was asked to take no more than 15 minutes to complete a pre-test via a Google form (Appendix B), scoring ten interactions on the READ Scale. The pre-test scenarios, representing the full range of the scale, were inspired by actual patron questions and, more importantly, were focused on the areas of confusion that had been identified from employee inquiries. The goal of the pre-test, due in advance of the meeting, was to get a sense of how much agreement already existed and to identify the issues we needed to concentrate on during the workshop. The results of the pre-test confirmed the need for a calibration exercise, with only one question eliciting 100% agreement.

The workshop was scheduled for March 2019 at a time that allowed for the most participation possible from all three departments. It was challenging to find a mutually agreeable time given the demands of our

desk services, which at the time were operating 24 hours a day, 5 days a week. After planning for desk coverage, we were able to find an hour and thirty minutes in an afternoon in the middle of the week. As uncommon as it was, assembling all three departments in one space at the same time was vital for working as a group and learning from each other.

We began the workshop with a short introduction of the goals for the session, details on how we use statistics and READ Scale scores, and a high-level overview of our pre-test results. We wanted to highlight the connection between reporting and decision-making, as well as set the scene for our current collective READ Scale challenges. The rest of the workshop consisted of a series of interactive activities designed to involve attendees in a group solution. To encourage collaboration, we divided attendees into small groups with representatives from each department and no more than two people from the same department, and gave each group new scenarios to work on (Appendix C). Group members talked through how they would individually score each scenario and then came to a consensus READ score for each scenario. This was followed by a full-group reflective discussion that allowed us to explore the various perspectives, find areas of agreement, and answer questions in real time. Then, we used Kahoot! for a post-test with the original scenarios, minus the one with 100% agreement. The results were much more favorable. There was 100% agreement for six questions. The remaining three questions reached 94% agreement. After discussing any remaining questions from the quiz, we ended the session by giving attendees a copy of the READ Scale to mark up with their own examples of patron interactions for each score.

The elicited ideas were used to start developing our localized READ Scale. We also asked the departments for additional feedback on the READ Scale after the workshop. All of the ideas and suggestions were collected on a Google document. The leadership team used that document to create a draft that was shared for final comments. In June 2019, we posted our

revised READ Scale to start using it (Appendix D). We were able to link to it from our patron interaction collection form.

Findings and applications

The calibration meeting took place on March 21, 2019, and VCU began the rapid transition to remote learning almost exactly one year later on March 13, 2020 (Table 1). To capture the effect of calibration before the COVID-19 pandemic impacted library services, patron interaction statistics have been analyzed from March 22 to March 21 of each year. In the year immediately following the calibration meeting, there was a decrease in the percentage of patron interactions scored a 1 or 6 and an increase in the percentage of interactions scored a 3, a statistically significant difference in proportions, p < .001. This was a primary intended outcome of the calibration and scale modification processes.

Table 1

Patron Interaction READ Scale Distribution

	2018/2019	2019/2020
1	77.62%	72.71%
2	18.92%	22.72%
3	2.11%	3.06%
4	0.80%	1.10%
5	0.49%	0.39%
6	0.07%	0.02%

$\chi^2 = 559.31, p < .001$

Longitudinal analysis (Figure 1) is problematic because of the many confounding variables introduced by the pandemic. The nature of academic library patron interactions changed dramatically after the rapid transition to remote learning, and may never return to what they looked like before March 2020. For example, while Cabell Library reopened to patrons in July 2020, gate counts remained tens of thousands of patrons below pre-pandemic levels during the 2020–2021 academic year, and had not fully recovered as of spring 2023. VCU has continued to offer a

substantial number of online and hybrid/hyflex classes, likely impacting foot traffic on campus and in the library. Pre-pandemic, a significant proportion of patron interactions consisted of Access Services staff providing directional assistance. Without as many patrons in the building, it is not surprising that the proportion of interactions scored a 1 sharply decreased in 2020–2021 and have not yet returned to pre-2020 levels. The transition to remote learning and research also impacted the nature and number of faculty questions: we received more requests to access and purchase electronic resources and calls for assistance to build or incorporate library learning objects into course management systems. So it is not unexpected that the proportion of patron interactions scored a 4, 5, or 6 greatly increased in 2020–2021 and remain higher than their pre-pandemic levels as of spring 2023. Because of these confounding factors, we cannot determine the longitudinal impact of the READ Scale calibration. However, as can be seen here, collecting READ Scale scores has provided extremely useful data beyond mere anecdotes as to how our patron assistance has changed over the course of the pandemic.

READ Scale % Distribution for Patron Interactions Occurring March 22 – March 21 of Each Year
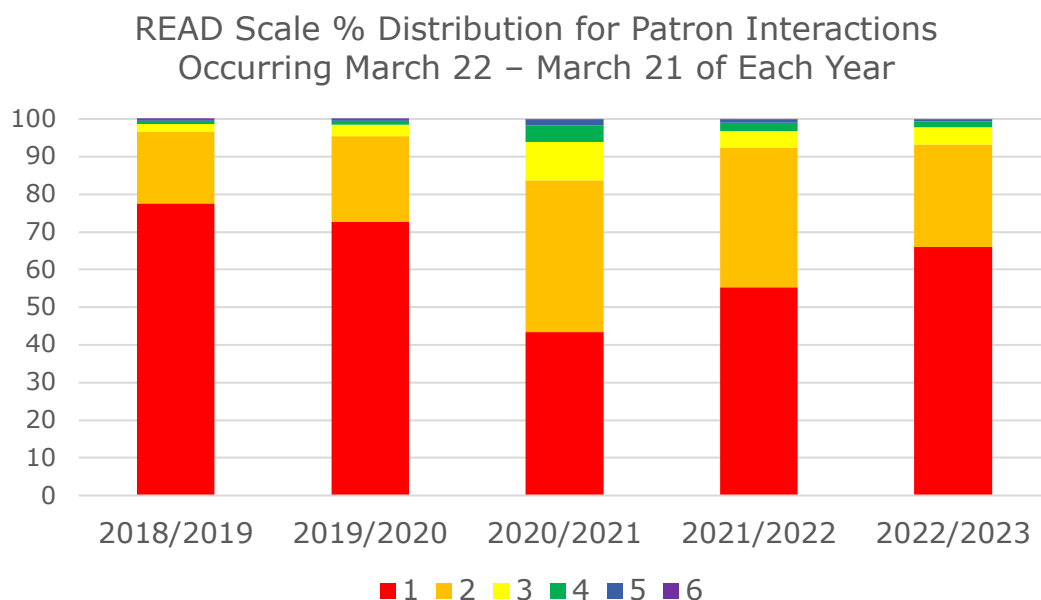
Figure 1

Internal feedback about the process used to calibrate and modify the READ Scale has been positive. Comments from Academic Outreach included: "The exercises y'all used were really helpful in sorting out the

nuances. […] They brought out a fair bit of discussion" and "What I found most valuable was having AO/SSD and AS in the room together. We discuss our shared service separately, which makes it difficult to understand the perspective of the folks involved, based on their experience. I think it was positive for morale." Along similar lines, the then-head of Access Services noted, "I know that my staff feel that their contributions to our patron experiences will be more accurately reflected in the future, as we included more front line non-library consultation interactions in the scale. [My] staff had been under-evaluating their expertise and knowledge when using the older, reference-based scale." The Student Success department has requested that the same approach be used to address other issues where clarification is needed and there are differences of opinion across departments. And the modified scale itself has been so useful that it inspired VCU's Health Sciences Library in 2023 to make their own revisions to the scale to include examples specific to the health sciences (e.g., "Systematic/scoping reviews or other syntheses that require a systematic search" as an example READ score 6 interaction).

Conclusion

Overall, the READ Scale calibration was successful, but we would do some things differently were we to repeat this process. Our intent had been to regularly remind our departments of how patron interaction statistics were used and of the importance of accurate READ Scale scoring. One idea for this had been to annually analyze and share the distribution of READ Scale scores, comparing the current year's distribution with previous years and discussing notable trends in the data. We had also intended to add READ Scale training to our employee onboarding processes and to regularly review scoring data with longer-term employees. However, the timing of our scale modification process (March–June 2019) worked against us. Before we could collect a full academic year's worth of data, the COVID-19 pandemic occurred. COVID-19 required our three public services departments to deprioritize everything not directly related to the rapid transition to remote learning,

and later, to reopening the library building amid numerous safety protocols and developing myriad online learning objects. A pandemic-induced budget shortfall also meant that no new full-time employees were hired for over two years.

The importance of READ Scale training to the employee onboarding process and current employee development cycle became evident during the past year. A recent examination of patron interaction statistics for the Access Services department revealed that employees are still reporting interactions at a READ score of 3 less frequently than expected. Additional examples relevant to this department, such as calling for police/medical help during emergency situations, could be added to help address this disparity. It was also determined that there are other ways VCU's modified READ Scale could be further refined to capture the work of employees in this department. For instance, the example interactions could be subcategorized for ease of findability, e.g., directional/equipment, circulation, and reference.

Our next steps for VCU's modified READ Scale draw directly from these lessons learned. In the four years since our initial calibration and scale customization, library public services work has had to adapt to pandemic-induced learning and communication norm changes. It is therefore time to bring our departments together again to review our modified scale and identify other needed changes. Additionally, many employees (including a department head for Access Services) have been hired since VCU's hiring freeze lifted, warranting a review of our onboarding processes, including READ Scale training.

As with any service or program designed for a particular institution, there are limitations as to the generalizability of this model. VCU Libraries' particular adaptation of the READ Scale is constrained by the need to classify the patron interactions of three departments doing fairly different work. Libraries working with more homogeneous patron populations might benefit from a much more customized READ Scale than our own.

Alternatively, smaller institutions with little variation in their patron interactions (e.g., mostly complex or mostly simplistic queries) may not find the extra layer of information provided by the READ Scale useful. Another limitation to this model's generalizability is employee time constraints. Adding a READ Scale score when reporting patron interactions generally requires little additional time, but at a busy service desk, even one extra second may be too many. These time constraints will be exacerbated when a transaction is not immediately classifiable as a particular READ score and the scale must be consulted. The longer a form is, the less inclined busy employees may be to report their patron interactions. Bias in the form of underscoring (as in VCU Libraries' experience) or overscoring may also be an issue. If patron interaction data is used to determine staffing and building hours, employees may feel pressure to overscore as a form of job security. Finally, human data entry error is a perennial issue. Even employees not pressed for time will occasionally be inattentive or a form may malfunction. Unless the recorded data is checked frequently, it may be difficult to tell whether questionably low or high READ scores were entered intentionally or accidentally. Such ambiguity erodes the reliability of the data and can complicate decision-making intended to be informed by READ Scale data.

Despite these limitations, we believe that our modified scale and its development process may be of interest to other libraries and the wider library assessment community. Adding READ Scale data to forms recording patron interactions has many useful purposes, as outlined earlier in this paper. Customizing the scale to address local practices could increase the accuracy and usefulness of data libraries may already be required to collect. Furthermore, the process we used to modify our scale and calibrate its use across three departments was highly successful and, as described earlier in this paper, could be applied to other contexts. By beginning the process with sharing the anomalies in our data and collaboratively scoring and discussing example scenarios, our departments understood the issues at hand and were invested in the project. Additionally, the iterative, participatory methodology ensured

that all stakeholders felt their concerns were heard and their questions were addressed.

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Appendix A: VCU Libraries (Cabell Library) Patron interactions form

Appendix B: READ Scale Pre-test

READ Scale

Please use the READ scale to rate each transaction described.

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1. A patron asks for a specific DVD in our collection. You look it up in VCU Libraries Search; make a note of the call number; retrieve it from the DVD wing of the 121 suite; and check it out to them.

	1	2	3	4	5	6
READ Scale	○	○	○	○	○	○

2. A student taking a graduate level criminal justice course used the schedule appointment button on the criminal justice guide to make an appointment with you (pretend you are the Public Affairs Research Librarian if you aren't). They requested help finding cases about employment discrimination in nonprofits. You met with them for 30 minutes. You covered searching for cases by subject in WestlawNext. The student left happy with 2 possible cases for their brief.

	1	2	3	4	5	6
READ Scale	○	○	○	○	○	○

3. A student emails you seeking assistance because they're not able to access an ebook that VCU Libraries licenses. You investigate in multiple browsers and find that the ebook is taking so long to load that sometimes the request times out, and sometimes it goes through. You submit a problem report so someone can look into the issue, and in the meantime follow up with the patron advising them to try a different browser, walking them through how to do the search to get back to the item, and to let you know if they still can't access the ebook.

	1	2	3	4	5	6
READ Scale	○	○	○	○	○	○

4. A patron comes to the Information Desk and asks how to print something.

	1	2	3	4	5	6
READ Scale	○	○	○	○	○	○

5. Patron asks if we have a specific book in our collection. You show the patron how to search VCU Libraries Search, using the advanced search option. The book is currently on loan, so you recommend using ILLiad to borrow from another library. The patron has not used ILL before, so you help them create their profile, and then show them how to request the book they need.

	1	2	3	4	5	6
READ Scale	○	○	○	○	○	○

6. A mass communications faculty member emailed you about accessing historical employment data for radio announcers. You searched the Bureau of Labor Statistics (BLS) website and found a relevant report, but after some back and forth with the faculty member, you determine it is not quite what is needed and not in the desired format. You did find a relevant print series at another library, and you called them to confirm their holdings. You also called a contact at the BLS for more information about the possibilities. They confirmed you had located all of the relevant data, and indicated that, unfortunately, the data shouldn't be used for year over year comparison because the data collection was not consistent. In the end, you weren't able to provide exactly what was needed, but the faculty member was satisfied with the information provided and was able to move on with their research.

	1	2	3	4	5	6
READ Scale	○	○	○	○	○	○

7. An English Language Program student emails you seeking the "Daily EU Emission Allowance Prices from August 28, 2003 to December 29, 2006." You spend a few minutes looking for an EU report that might address this but come up short, so you reach out to VCUL's Government Documents Coordinator. She's able to find emissions allowance prices only going back a couple years, so she refers you to the Business Research Librarian. The business librarian investigates and identifies a few resources that may help the patron, including the Bloomberg terminal in the School of Business, which you pass on, along with the Business Research Librarian's contact information in case the patron has additional questions.

	1	2	3	4	5	6
READ Scale	○	○	○	○	○	○

8. Patron calls and asks to be transferred to the Workshop. You transfer the call.

	1	2	3	4	5	6
READ Scale	○	○	○	○	○	○

9. While chatting, a student indicates they need to find an article in a local paper about public transportation. You get them to Access World News and walk them through a search in the Richmond Times Dispatch collection. They find multiple articles that might work. You share the Find Local News & Data Resources guide in case they need more help. The student is happy and signs off.

	1	2	3	4	5	6
READ Scale	○	○	○	○	○	○

10. You are staffing on-call and are called out to assist a UNIV student looking for sources for a paper. After talking with the student, you determine that they are having difficulty finding relevant sources because their topic is so broad, which the student quickly agrees. You work with the student, easily identifying an aspect of their topic that most interests them and is likely to be written about in the literature. You help the student reframe their research topic accordingly and walk them through finding a first couple sources in Academic Search Complete.

	1	2	3	4	5	6
READ Scale	○	○	○	○	○	○

Appendix C: Scenarios for READ Scale activity (think-group-share)

Scenario 1

A doctoral student in Public Policy and Administration reaches out to you (you are the Public Affairs Research Librarian) by email. The student asks about sources that look at race and economic opportunity. After some preliminary searching, you recognize that the question is too broad for a succinct response. You reply to the email with a couple suggested databases and also recommend an in person consultation for further discussion.

The student takes you up on the offer, and you meet about a week later. During the consultation you find out that the student's research is a possible dissertation topic that will require a thorough literature review and an extensive original research project. You cover two or three of the best databases for their topic. You also look at potential sources for data and government documents on the topic. You mention other possible contacts that could help with various aspect of their research including the Business Research Librarian, the Research Data Librarians, and a faculty member on campus that you know that is doing similar research.

After about an hour, the student is ready to follow up on the sources covered and promises to check back in with you at a later date.

Scenario 2

At the Information Desk, a patron asks for help in locating resources for an assignment, the focus of which is Nike's "Just Do It" ad campaign. You ask the patron what class this assignment is for so you can determine the most appropriate resources. You discover it is for a UNIV200 class, and they need some peer reviewed articles in addition to other resources.

You show them how to locate the course guide for this class. You offer to work on a search for articles together. You choose one of the databases listed on the course guide, Academic Search Complete, and try these search terms: "just do it" and "advertising campaign". There are some good results, though not many academic articles. Doing the same search in VCU Libraries Search surfaces additional relevant, peer-reviewed materials.

You ask the student if they have enough help to get started on their research, and they answer "yes." You let them know that if they have more questions, they can return to the Information Desk or meet with a librarian, either through our on call service or by scheduling an appointment.

Scenario 3

A professor emails requesting citation assistance. They have several tricky sources, including an individual chapter written by one author drawn from a book co-written (not co-edited) by six authors; however, the professor also refers to the book as a whole elsewhere in their article. You spend a fair amount of time consulting various resources and find there are no definitive answers for most of the professor's sources. However, you cobble together some instructions to share with the patron.

Would your rating change if this interaction were handled over chat? In person? Would your rating change if this interaction took place during a consultation the professor had scheduled with you?

Appendix D: VCU Libraries (Cabell Library) READ Scale

https://drive.google.com/file/d/1aHH6JQZ3dQI_n1gBeeI1vNw69ScnY00v/view

READ Scale for Cabell 1st floor
(Original READ scale: http://readscale.org/read-scale.html)

1
- No specialized knowledge, skills, or expertise;
- No consultation, or cursory consultation, of resources.

Examples
- Directional inquiries;
- Library or service point hours;
- Equipment inquiries (e.g., "Where is the printer?" or "Do you have a fax machine?");
- Immediately transferring an email or phone call to another library employee/department;
- Circulating items in Alma.

2
- Require only minimal specific knowledge, skills, or expertise;
- Answers may need nominal resource consultation.

Examples
- Call number inquiries;
- Assistance with equipment issues (how to print, troubleshooting scanner, etc.);
- General library or policy information or interpretation (noise complaints, guest access, etc.);
- Demonstrating services (setting up an ILLiad account, reserving a study room);
- Processing fine payments and making Rambucks deposits;
- More complex directional inquiry ("Can I see the on-call librarian?" or "I'm here for a meeting with …").

3
- Consultation and minimal instruction on resources is needed;
- Reference/research knowledge and skills come into play;
- Complex patron account enquiries (blocks, holds, payment plans).

Examples

- Answers that require academic resources such as Academic Search Complete, Google Scholar, or Opposing Viewpoints;
- Basic instruction on searching VCU Libraries Search for books and articles, including filters;
- Overview and quick demonstration of relevant subject databases;
- Direction to research guides with suggestions for appropriate resources;
- Web searching for a known item;
- Troubleshooting complex technical/access problems.

4

- 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/research knowledge and skills required;
- Exchanges are more instruction-based as staff teach users more in-depth research skills.

Examples
- Instructing users how to utilize complex search techniques for VCU Libraries Search, databases, and the web;
- Instruction on citation-mining;
- May require consultation of a colleague with specialized knowledge;
- Assisting users in focusing or broadening searches (helping to re-define or clarify a topic);
- Most on-call or scheduled consultation are at least a 4.

5

- Specialized knowledge needed;
- Efforts are cooperative/dialogical in nature between the researcher and librarian and may take on a 'back and forth' nature;
- If a scheduled consultation, likely requires in-depth preparation;
- Outside (non-VCU Libraries) resources may be consulted.

Examples
- Interdisciplinary consultations/research;
- Evolution of research question;
- Graduate/faculty research.

6

- Very rare on Cabell first floor;
- Involves content/knowledge creation;
- Partnership with faculty members and/or graduate students.

Examples
- Creating bibliographies/curated lists of resources including a LibGuide;
- Relaying specific answers and supplying supporting materials for publication, exhibits, etc.;
- Collaborative and on-going research.