
Evaluating Reference Consultations in the Academic Library

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Abstract

In 2015, McGill University Library undertook a project to investigate, propose, and pilot test a method for evaluating the quality and outcomes of reference consultations. The goal of the project was to gather evidence to demonstrate the importance of reference consultations as part of librarians' core contributions to the university. The evaluation tool was developed based on input from librarians, users, and a review of the literature. The evaluation was sent out to 98 users during the pilot test period. There were 53 responses to the evaluation tool for a response rate of 54%. Though preliminary, the results of the pilot test can be helpful in determining the usefulness of evaluating reference consultations, and the outcomes of engaging in assessment of this core library service. The results from this project suggest that implementing a tool to evaluate consultations can be used to inform services and to demonstrate the value of the library for research, teaching, and learning.

Objective

Information services for students and faculty is a key area of responsibility for reference (or liaison) librarians in the university setting, and in-depth reference consultations are an important component. While many academic libraries are diligent about keeping reference statistics, few go beyond these basic measures to evaluate reference interactions, including more lengthy consultations. Establishing and implementing a tool to evaluate consultations could provide the library and librarians with a clearer picture of the effectiveness of consultations and suggestions for improvement.

In early 2015, McGill University Library's assessment librarian observed a lack of scholarship on the outcomes of reference consultations. In tandem with a practicum student in the McGill School of Information Studies, she initiated a project to

evaluate reference consultations at McGill. Due to the specific practicum guidelines, the entire project was researched, organized, and tested in a condensed 13-week timeline.

This project was guided by the overarching question, "How can we gather evidence to demonstrate the importance of reference consultations as part of librarians' core contributions to the university?" In addition, the project investigators were interested in a number of things: "Why do library users book reference consultations?" "What occurs during a typical reference consultation?" and "How helpful do library users find reference consultations?"

Defining the reference consultation

In library and information studies literature and within libraries, reference consultations have many different names: "appointments," "meetings," "RSVPs," or "book a librarian" services. For the purpose of this project a reference consultation was defined by two criteria: it must involve in-depth, advanced reference activities, such as literature searches, the introduction of new resources, or teaching software; and, it is scheduled, rather than a serendipitous reference encounter. This definition is supported by the literature; Gale and Evans¹ describe consultations as "in-depth, personalized instructional research sessions," while Magi and Mardeusz² claim that consultations are "...a reference service in which the librarian meets with a student in a scheduled session away from the reference desk."

Why evaluate consultations?

The McGill Library is one of the largest research-intensive libraries in North America. Located in Montreal, Quebec, McGill employs 63 librarians across 12 branch libraries, including the University Archives.³ In the 2014–2015 academic year, McGill

Library had over 2.3 million visitors, 54,175 reference transactions, and 1,323 reference consultations.⁴ The majority of these consultations (46%) lasted between 30 and 60 minutes, while an additional 18.46% of consultations were longer than 60 minutes. These figures are considerable, and they do not include time that librarians spend coordinating, preparing for, or following up after the reference consultations.

Reference service guidelines

The Reference and User Services Association division of the American Library Association outlines a set of behavioral guidelines for conducting reference and information services for librarians. Successful reference interactions are characterized by the following performance indicators: the visibility/approachability of staff; the perceived level of interest in the question; how well the librarian listens and makes clarifying inquiries; how successful the search is; and whether or not the user feels appropriate follow-up activities occurred.⁵ These behaviors are heavily reliant upon the librarian's reference competencies, which are defined by their access to information, pre-existing knowledge base, ability to market or raise awareness about information or services, willingness and desire to collaborate, and their evaluation and assessment of resources and services.⁶ These reference competencies provided the foundational elements upon which the evaluation tool was based.

Development of the evaluation tool

Literature review and environmental scan

Few academic research libraries have created evaluation tools for reference consultations. At the March 2015 Association of College and Research Libraries conference, Devin Savage highlighted the dearth of assessment when it comes to reference consultations, stating that we are "not counting what counts."⁷ Consultations are an essential and popular component of library services yet they are not assessed in the same way that other integral services are.

There are a few libraries that have taken on the challenge of evaluating reference consultations, often by implementing a satisfaction-style survey that is offered to patrons upon completion of a reference interaction.⁸ Recently, Wayne State University Library ran an interview-based study that found that students who attended reference consultations experienced an increase in confidence in doing research and learned new resources and/or

new search techniques.⁹ Another evaluation method is using in-depth analysis of citations to measure the impact of reference consultations.¹⁰

Consultation with librarians

A critical step in the development of the evaluation tool for the pilot project was a series of short, informal fact-finding discussions with five of the university's liaison librarians. Each librarian was from a different branch in order to provide perspective on the various types of reference consultations at the McGill Library.

Clear trends emerged from these discussions. All five librarians spoke about their love for conducting reference consultations, noting that it was one of the times they felt they could make the greatest impact and forge lasting connections. Reference consultations gave them the time they needed to practice "old school librarianship," the sort of work that they "imagined [they] would do as a librarian." Master's and doctoral students were the most common consultation user groups, with most consultations lasting between 20 and 60 minutes (though some were as long as two hours). Librarians reported that consultations were usually arranged ahead of time by e-mail, but sometimes included walk-ins or lengthy phone calls.

In addition to these trends, there were some differences of opinion. A few of the librarians were in favour of evaluating reference consultations because they were interested in the feedback or thought the information could be valuable. Other librarians were hesitant, raising concerns about professionalism, appropriateness of the proposed evaluation method, validity of participant responses, and transparency of results.

Designing the evaluation tool

For the evaluation tool, it was decided to create a brief questionnaire that could be administered to the user as a follow-up to the reference consultation. In order to create the tool, a list of seven questions was drafted and presented to the McGill Library Assessment Advisory Committee for review. The final evaluation tool that was administered for this pilot project is available from: <http://bit.ly/McGillConsultFeedback>.

Online survey platforms were reviewed in order to determine which would be the most appropriate for the pilot test of the evaluation tool. Google

Forms was selected because the platform is free, easily modifiable, permits downloadable results, and produces the evaluation tool in a format that is compatible with mobile devices. Once Google Forms was selected, the evaluation tool was built, and bit.ly was used to create a shortened custom URL.

A draft version of the evaluation tool was pre-tested using paper printouts of the questions prior to launching the pilot. The pre-test participants gave valuable feedback and some questions were revised.

Once the questions for the evaluation tool were finalized, a general call for participation in the pilot project was sent out to all of McGill's liaison librarians. Ten of McGill's liaison librarians agreed

to participate in the project. They were supplied with a message to be sent by e-mail to all users who had a reference consultation in the winter semester. The evaluation was launched on March 10, 2015. Invitations were sent out to a total of 98 possible respondents during the pilot test period.

Results of evaluation

Respondents

Overall, there were 53 responses to the evaluation tool for a response rate of 54%. All but one of the respondents were members of the McGill community, spread across various faculties (Table 1) and most were graduate students at the master's and doctoral levels (Table 2).

Table 1. Faculty affiliation

Affiliation	Number (N=53)	Per-cent*
Faculty of Arts (including Schools of Social Work, Information Studies) or Faculty of Religious Studies	21	40%
Faculty of Medicine (including Schools of Nursing, Physical & Occupational Therapy, Communication Sciences & Disorders) or Faculty of Dentistry	13	25%
Faculty of Engineering (including Schools of Architecture, Urban Planning)	9	17%
Faculty of Science (including School of Computer Science)	6	11%
Faculty of Education	2	4%
I'm from McGill, but not part of a faculty	1	2%
I'm from another university	1	2%
Desautels Faculty of Management	0	0%
School of Continuing Studies	0	0%
Schulich School of Music	0	0%
Faculty of Law	0	0%
Faculty of Agricultural and Environmental Sciences (including Schools of Dietetics, Human Nutrition)	0	0%

*Percentages have been rounded to the nearest integer and therefore may add up to more than 100%

Respondents are relatively well distributed across the library user groups, but as the liaison librarians indicated, master's and doctoral students do

comprise the majority of respondents. It is worth noting, as well, that there were no post-doctoral

students/fellows, medical or dental residents who participated in the pilot.

Table 2. Status

Status	Number (N=52)	Percent
Master's student	21	40%
Doctoral student	12	23%
Undergraduate student	11	21%
Faculty/professor/instructor	4	7%
Research or administrative staff	3	6%
I'm not from McGill	1	2%
Librarian or library staff	0	0%
Post-doctoral student/fellow	0	0%
Medical or dental resident	0	0%

Users were asked when their most recent consultation appointment had taken place. The majority (62%) of respondents reported completing

their consultation appointment in the last month, with 34% of them in the last seven days (Table 3).

Table 3. Timing of reference consultation

Reference consultation	Number (N=53)	Percent
Within the last 7 days	18	34%
Between 8 days and 2 weeks ago	4	8%
Between 2 weeks and 1 month ago	11	21%
More than one month ago	19	36%
I don't remember	1	2%

Purpose and content of consultations

Users were asked to indicate what the purpose was for booking their most recent consultation appointment (Table 4). The responses were not mutually exclusive. Responses were rather

evenly split between coursework (42%), thesis or dissertation work (40%), and research (funded and non-funded, 44%). These findings are in alignment with the respondents' statuses as students, and of this, mainly master's and doctoral students.

Table 4. Purpose of reference consultation

Purpose	Number (N=53)	Percent
Coursework/assignment	22	42%
Thesis or dissertation	21	40%
Non-sponsored (non-funded) scholarly research	12	23%

Purpose	Number (N=53)	Percent
Sponsored (funded) scholarly research	11	21%
Other activities, including general interest	3	6%
Teaching	2	4%
Patient care	1	2%

Users were also asked to identify the content of the consultation, and could choose as many as apply (Table 5).

Table 5. Content of consultation

Activity	Number (N=53)	Percent
Identifying or locating specific information/resources (e.g., relevant books, articles, datasets, music scores, newspapers, primary sources, and other resources I was previously unaware of)	38	72%
Improving my skills in using one or more resources (e.g., searching journal databases, searching the catalogue)	37	70%
Learning how to access print or electronic materials (e.g., research/subject guides, finding full-text journal articles, streaming music)	24	46%
Improving my ability to use software (e.g., citation software, data visualization software)	12	23%
Other	4	8%

Satisfaction and reference service values

When asked about the overall helpfulness of the reference consultation, all 53 respondents selected “very helpful.”

A question about values in the reference consultation asked respondents to what degree each of the values was addressed in the reference consultation (Table 6). This was the question that was most skipped by respondents.

Table 6. Values addressed in the reference consultation

Value	Did not address this	Neutral	Completely addressed this	Not applicable	Total responses (N=53)
The consult facilitated excellence in teaching, learning, or research	1 (2%)	1 (2%)	38 (71%)	2 (4%)	42 (79%)
The librarian/library staff responded to my information needs	0 (0%)	1 (2%)	46 (87%)	0 (0%)	47 (89%)

Value	Did not address this	Neutral	Completely addressed this	Not applicable	Total responses (N=53)
The consult reflected a respect for my confidentiality as a library user (e.g., respected the private nature of subject matter, freedom from being disturbed by other people)	1 (2%)	2 (4%)	35 (66%)	14 (26%)	52 (98%)

A text box for comments invited written input from respondents. The comments were overwhelmingly positive, and reflected a wide variety of respondents. Many respondents wished to thank or highlight the skills, patience, assistance, and support of a particular librarian or library staff member. Other respondents indicated how important the consult service was to the success of their research.

Recommendations and future plans

Conduct survey on a sampling basis

While it could be useful to continue using the evaluation tool to gather more data from more consultation users, in the long term, continuous evaluation is probably unnecessary. The evaluation tool might be more effective when implemented in a regular sampling period. This would maintain current assessment data while balancing requests from users.

Revise or remove problematic questions

The evaluation tool has some problematic questions that require re-evaluation. One of the evaluation's questions asks respondents "how helpful was your consult?" One hundred percent of respondents indicated that their consult was "very helpful." While this is a positive and encouraging response the question could be revised to elicit a wider range of responses. Question 5, which asks respondents whether or not the consultation addressed library values, could be revised as well, considering the number of respondents that did not answer or selected "not applicable" to those three questions.

Mandatory questions

In the pilot project, none of the questions on the evaluation tool were mandatory. However, because

many respondents opted not to answer one or more questions, it might be worthwhile to review that approach and make all questions mandatory to see if doing so changes the frequency of responses and also the overall response rate for the evaluation tool.

Distribution method

Based on considerable feedback from the members of the Library Assessment Advisory Committee as well as the librarians during the practicum presentation, the respondents' invitations should come from a centralized university e-mail account, rather than directly from the librarian with whom they had the consult. This would decrease librarians' workloads, and simplify the tracking of consultations and response rate. An added benefit is that this would provide the opportunity to embed the evaluation tool in an e-mail, one of the features of Google Forms. This could increase response rate, as potential respondents would not need to click a link to complete the evaluation tool.

Offer an incentive

In terms of increasing response rate, it has been suggested by many different parties that offering an incentive—even something small—would increase responses. While the response rate was actually considerably higher than expected, it is realistic to anticipate that, moving forward, it will decrease; this tool was completely new in the pilot-testing period and individuals were offered the chance to give feedback for the first time. In the future, offering a small incentive may increase the response rate but it may also be problematic. Offering an incentive means that we will need to collect respondent e-mail addresses and store them separately from the rest of the survey responses; those who felt comfortable

filling in the survey because it was confidential might now take issue with the process.

Use of pilot project results

Whenever a library service is evaluated, it is important to consider sharing the findings with librarians, library staff, library users, and other members of the academic community. For librarians and library staff, the findings could be used in order to inform best practices for reference services. Sharing the results with library users can also be a way of increasing awareness about a valuable library service. Finally, these findings should also be shared with the wider university community, to demonstrate the library's contribution to the university's academic priorities, and highlight the impact that individual reference consultations have on student and faculty success.¹¹

Other uses of the evaluation tool

With minimal adaptation, this evaluation tool could be used to evaluate the outcomes of other types of reference transactions, such as virtual reference (both chat and e-mail) as well as in-person reference encounters at a reference desk. Using the same tool to evaluate all varieties of reference services would offer a clearer picture of library users' experiences and facilitate comparison of results.

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Notes

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2. Trina J. Magi and Patricia E. Mardeusz, "What Students Need from Reference Librarians Exploring the Complexity of the Individual Consultation," *College & Research Libraries News* 74, no. 6 (June 1, 2013): 288–91.
3. McGill Library, "Library Assessment," 2016, <https://www.mcgill.ca/library/about/library-assessment>.
4. Ibid.
5. American Library Association (ALA), "Guidelines for Behavioral Performance of Reference and Information Services Professionals," 2004, <http://www.ala.org/Template.cfm?Section=Home&template=/ContentManagement/ContentDisplay.cfm&ContentID=26937>.
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8. Gale and Evans, "Face-to-Face: The Implementation and Analysis of a Research Consultation Service," Magi and Mardeusz, "What Students Need from Reference Librarians Exploring the Complexity of the Individual Consultation."
9. Allison Faix, Amanda MacDonald, and Brooke Taxakis, "Research Consultation Effectiveness for Freshman and Senior Undergraduate Students," *Reference Services Review* 42, no. 1 (February 4, 2014): 4–15, doi:10.1108/RSR-05-2013-0024; Veronica Bielat and Judith Arnold, "Connecting to Student Success: Research Consultation Impact from the Student Perspective" (Concordia University Libraries' 14th Annual Research Forum, Montréal, QC, April 29, 2016).
10. Thomas L. Reinsfelder, "Citation Analysis as a Tool to Measure the Impact of Individual Research Consultations," *College & Research Libraries* 73, no. 3 (May 1, 2012): 263–77, doi:10.5860/crl-261.
11. Joseph R. Matthews, *Library Assessment in Higher Education*, 2nd Edition (Santa Barbara, California: Libraries Unlimited, 2014).