Reference transaction assessment: New York State libraries

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Profiles

Participants

- College and university libraries (45)
- College and university law or medicine libraries
- Community colleges (11)
- Public and state libraries (31)
- Libraries in the CUNY and SUNY systems

Criteria for Inclusion
- 1000 or more annual reference transactions
- 9.5 or more staff

Total Responses: 88

Collection size	# of Reference Transactions (peak month)			
	< 1K	1K – 5K	>5K	Not sure or do not count
<250K	23	3	0	4
250K – 1 M	11	4	0	0
> 1 M	2	5	2	2

Figure 1. Number of academic library responders according to number of peak month reference transactions and size of collection.

Responsibility for Reference Assessment

Title	# of Academic (N=56)	# of Public (N=31)
Library Director	4	6
Head of Public Services	14	4
Head of Ref/Instruction	25	16
Assessment Lib	2	1
Reference Lib	5	3
Director of Learning Commons	1	0
Director of Info and Ed Services	1	0
Manager of Lib Serv	1	0
Head of Family Services	0	1

Figure 2. Title of those with responsibility for reference transaction assessment.

Introduction

This view of reference transaction assessment data in academic and public libraries was extracted from a survey sent to 400 libraries in New York State. The intent of the survey was to determine how libraries use reference transaction data, whether they are satisfied with the assessment process, and how they would like to use data in the future. Included with the published article is information about the tools used in these libraries.

Satisfaction with assessment of reference transactions

17.9% satisfied
6.0% not satisfied
72.6% satisfied but would like to improve or would like to improve

Conclusions

Majority of respondents believe there is value in assessing transactions.

Analysis of data collected and data needed for decision making: do these match?

Decide how you would like to invest your time and your priorities for assessment.

Determine your assessment goals: data for reporting, making improvements, special needs?

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Data

Data collected	# organizations N=87	% organizations
# of transactions	86	98.9%
day or date	71	81.6%
type of question (ref, equipment)	70	80.5%
type of service (in person, virtual)	58	66.7%
time or shift	42	48.3%

Figure 3. Data collected by 45% or more of the libraries that responded.

Increased interest in future use of data?

How data are used	Current use N=84	Future use N=78
internal reporting	92.9%	74.4%
external reporting	81.0%	64.1%
tracking or adjusting service hours	54.8%	53.8%
staffing	56.0%	61.5%
monitoring trends	53.6%	57.7%
collection development	21.4%	39.7%
training	10.7%	21.8%
build ref question database	3.6%	24.4%
measure patron satisfaction	9.5%	48.7%
do not collect data or do not use	1.2%	1.3%

Figure 4. Current and future desired use of data collected. Responders noted increased future interest in those highlighted.

Match data needed to data collected. More/different data needed?

Future use of assessment data	Data needed to support future use
for staffing	? #transactions, type of question, transaction time (of day), transaction day or date, length of transaction, difficulty or complexity of question?
for monitoring trends	?unique to library (e.g., fewer phone, more virtual) – what does the library want to monitor?
for collection development	?sources used, call number/subject/discipline, questions that couldn't be answered?
for training	?unique to library (e.g., questions that couldn't be answered?
to build ref question database	?specific question asked, questions that couldn't be answered?
To measure patron satisfaction	?questionnaire, survey, feedback on transaction outcome?

Figure 5. Consider collecting different data to match decision making needs.

For more information:

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