

Implementing the READ Scale at the Austin Peay State University Library

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## Introduction

The collection and analysis of data regarding reference transactions in academic libraries continues to be important. Showers (2015) identified three overarching, strategic reasons for collecting and using library data: “1) enhancing the student experience; 2) demonstrating value for money; and 3) supporting research excellence” (p. 16). According to Mitchell & Seiden (2015), the compilation of detailed data to describe reference transactions may be used to provide insights into student behavior patterns and their utilization of reference services (p. 108). In particular, reference transaction data may provide information to be used by the library for decision making regarding reference desk staffing and scheduling, staff training, collection development, and outreach and instruction efforts.

Recognizing the value of this information, in the fall of 2014, the Felix G. Woodward Library’s reference services coordinator performed a comprehensive review of the reference statistics being collected. These statistics included the total number of reference questions asked each year, how people contacted reference personnel to ask questions, and when the reference service usage is the most frequent, as well as the types of questions being asked. The purposes of this review were to examine the service’s usage trends and to determine if the information being collected accurately reflected the way the reference desk service was being utilized. Looking at the number of reference transactions since 2010 revealed an average of 3,200 questions received annually by the Woodward Library’s 15 reference professionals. Reference assistance was available for 69.5 hours a week, and provided through a variety of modes that not only included face-to-face at the reference desk, but also telephone, email, chat, and SMS. All reference queries were answered by whichever library professional was on duty. Transactions were then tallied based on question mode and type.

Through 2010, an analysis of the data showed declining annual counts for several years in a row. These findings are consistent with national trends during the same time period (Kyrillidou et al., 2013). After 2010, the annual number of reference questions stabilized. The activity levels exhibited by the Woodward Library were consistent with trends seen at most academic libraries. These observations led

the reference services coordinator to the decision to focus on reviewing the types of questions being asked and, in particular, to examine the classification tool used for recording reference statistics.

The Woodward Library is the sole library serving Austin Peay State University, a public, master's large institution with a headcount enrollment of approximately 9,000 undergraduates and 900 graduate students. Prior to the spring semester of the 2014-2015 academic year, the Library used a classification scheme for reference questions that was loosely based on methodology first developed by William Katz (1969). See *Figure 1*.

*Figure 1: Previous Worksheet for Collecting Reference Transactions*

DATE: \_\_\_\_\_

Monday – Thursday Research Assistance Desk Transactions					*(also mark in other appropriate category)		
	Research /Reference	Directional	Referral	Computer Assistances	Telephone*	E-mail Reference*	Chat Reference*
8:00–10							
10–11:30							
11:30–1							
1–3							
3–4:30							
4:30–6							
6–7							
7–8							
8–9							
<b>Total</b>							

A preliminary look at the labeling of reference transactions reveals that distinctions between categories were not clearly defined, and were open to misinterpretation. This was demonstrated during a discussion of the reference question categories with the Woodward Library's reference personnel, where it was discovered that opinions varied—sometimes widely—on how each person categorized the same question. This became especially apparent when asking the difference between a “directional” or “referral” type of question. Many reference personnel defined both question types similarly. In addition to the problems

with category interpretation, discussions with Woodward Library's reference personnel showed that most thought this method of classifying reference transactions did not provide a complete portrayal of the amount of time and expertise needed to properly answer queries. This corroborated the findings of an Association of Research Libraries (ARL) study by Novotny (2002), which revealed that many librarians believed that the statistical measures they were using did not accurately reflect the nature of the time and effort involved with answering reference questions.

Determining reference desk staffing needs was difficult for Woodward Library administration due to the deficiencies in the data that was derived from the then-current classification scheme. For example, when outlining reference desk work schedules, it is useful to identify times of highest patron activity and needs for assistance. Using the scheme that was in place did show times of peak activity; however, due to the ambiguity of the questions classified as research/reference and the amount of skill required to answer them, it was impossible to assess the level of professional assistance needed during those intervals. When looking at the administrative issues that came from the misinterpretation of the categories, and combining that with the general feeling among reference personnel that the scheme did not accurately represent the work being done, it was clear that the reference question classification scheme in use was the root problem that needed to be addressed.

After identifying the need to change the reference classification system, the reference services coordinator began to investigate reference question classification methods that could provide accurate information, with the intent of acting on the data that would result from such an implementation. After reviewing the literature and studying possible options to replace the previous reference question classification scheme, the reference coordinator selected the READ Scale. This classification scheme is free, straightforward and fairly easy to use, requires very little training, and would provide the information sought by library administrators (Gerlich and Berard, 2007). This paper will review the implementation process at the Woodward Library, describe the adaptations made to the classification

scheme to reflect the Library's needs, and discuss the level of satisfaction users have with the new system.

## **History**

The phrase "reference transaction" has been consistently defined as an interaction between a librarian and a library user that involves a question and answer regarding the user's information needs (Reference and User Services Association, 2008). Over the years, however, there have been long-standing debates among reference librarians regarding how to classify reference transactions (Kuruppu, 2007). These debates question whether the best way to evaluate a reference service is to use the amount of time it takes to answer a query, the type or number of resources used, or the level of expertise needed to answer a question. In 1936, Edith Guerrier (1936) reviewed a sample of reference questions from nine major public libraries around the United States. These recorded questions were counted into four categories that were defined by the expected amount of time it would likely to take to answer them. This paper included an interesting discussion about the factors that contribute to how long questions may take to answer. A few decades later, Rothstein (1964) discussed the trends for measuring reference service. This article included brief explanations for the various methods used to classify questions. A couple of years later, William Katz wrote *Introduction to Reference Work* (1969). In this book, Katz developed a way to define and categorize various reference questions transactions that is still one of the more popular methods in use by many libraries today.

Each of these classification schemes was developed to fill an informational need in a library that may not have been covered by existing methods, and they each have their merit; however, they all have complexities or definitions that can be misunderstood. As an example, in the Katz method (1969), finding a call number for a patron may count as a reference transaction for some librarians, while others may consider this type of question to be directional. This inconsistency is further amplified when classifying questions as "ready reference" or "reference." Problems with defined question categories is especially notable with library professionals who have been working with one classification scheme, and then begin

using another one with similar terminology, but different definitions. While regular training in the use of a system along with regular reviews of the categories used by library personnel can prevent some of these problems, the information collected still needs to reflect the information needs of the institution.

While there are a number of other classification systems available, a modified version of the Katz system was used at the Woodward Library until the reference services were reviewed in the fall of 2014. For a number of years, this system satisfied the Library's statistical reporting requirements. Until 2012, library administrators at most academic libraries, including the Woodward Library, were required to collect and maintain statistics that were reported to the National Center for Education Statistics (NCES), which then compiled the information into the Integrated Postsecondary Education Data System (IPEDS). These statistics were required from all institutions receiving federal student financial aid money. The IPEDS report included a requirement to tally the number of service hours and reference transactions provided. After 2012, the NCES no longer collected reference transaction information; however, this information is still requested by the Association of College and Research Libraries (ACRL) for its annual Academic Library Trends and Statistics Survey (Donovan and Fishel, 2015).

Without the need to compile specific reference statistics for IPEDS, library administrators and reference professionals at Woodward Library had an opportunity to redefine the statistics collected and reflect on what information they wanted to collect, how this information would be used, and how to accurately interpret the meaning of this information. As Janes (2003) suggests, a number of statistics can be tracked to improve reference services. Determining how much time is spent answering questions, how often library services are being used, how accurately questions are being answered, and what types of questions are being asked are statistical measures that help a library improve and respond to patron needs or to larger societal changes. At the Woodward Library, the existing classification scheme and counting tool was able to ascertain peak usage times and days. However, these statistics did not provide information regarding answer accuracy, the services being used, or the type of questions being received by reference personnel.

Discussions with the Woodward Library's director and reference professionals revealed a number of data information needs. These needs included the number of reference questions asked, the level of complexity of these questions, the mode of communication, time frames during which questions were being asked, and the physical location of the questions received. Each of these pieces of information was necessary to provide clarity for the effective operation and management of reference services. These discussions made it apparent that the Library needed to maintain statistics that provided more detailed information regarding the complexity of reference transactions. These data can help library administrators determine not only the professional staffing levels needed at the reference desk, but also changes to consider for the Library's instructional student learning outcomes and potential adjustments to online content.

### **Literature Review: A Search for Possible Models**

William Katz (1969) developed what was to become a highly-used model for reference question classification. Katz's method divides reference questions into four categories based on a scale of increasing complexity and the time required to provide a satisfactory response. It lists the categories as follows: directional; ready reference; specific search questions; and research. Directional queries require knowledge of the library floorplan and represent the lowest level of complexity. These questions take the least amount of time to answer since they can be resolved by pointing out to the patron the location in the library of a particular resource being sought. Ready reference questions require some thought, but often take a minimal amount of time to answer, as they are usually able to be answered by consulting a single source dedicated to a specific subject. In the Katz method, specific search questions are a third category of reference question. Answering questions of this type requires library professionals to think critically about the resources needed to provide information needed by a patron. The final category, the research question, involves the most expertise, time, and energy, and requires a librarian to provide exhaustive results of the topic requested. Until the spring 2015 semester, the Woodward Library's reference query classification scheme was based closely on Katz's scheme.

In 2001, Warner (2001) described a reference query classification scheme that was developed at East Carolina University. This system utilizes four categories of reference questions, and consolidates the level of complexity with the amount of time required for a response. Additionally, this method focuses more on the dimension of how resources and skills are used. The classification categories for this system include: nonresource-based; skill-based; strategy-based; and consultation. Nonresource-based questions are the equivalent of directional questions or questions that can be answered using signage. Skill-based questions are essentially questions that can be answered by most people who work in the library. These questions often involve demonstrating how to use equipment or library resources. The category of question that Warner calls strategy-based not only requires deep thinking, but also an extensive understanding of subject resources. The final reference category in the Warner model is consultation, which is reserved for questions that are likely to take longer to answer, require more effort, and need a higher degree of skill than is usually required. After reviewing the reference categories listed in this model, it could be considered an enriched and perhaps modernized version of the classification scheme originally laid out by Katz (1969).

Neville and Henry (2009) compared the use of the Warner system to the traditional Katz methodology. In their article, the authors discussed the implementation of the Warner system at the University of South Florida. Their study then reviewed and compared how reference personnel identified questions when using each of the two methods. The results of this study concluded that the Warner system was a good alternative to the Katz method of classifying reference questions. In this article, there was also some discussion that included basic information about the Reference Effort Assessment Data (READ) Scale, which had been proposed by Gerlich and Berard (2007). Neville and Henry concluded that even with the potential for significant interpretive discrepancies, the Warner system and the READ Scale both included categories that accounted for time and effort that improved the methodology of classifying reference questions.

Gerlich and Berard (2007) introduced the READ Scale as another alternative for classifying reference question transactions. The READ Scale expanded to six the number of categories used to classify reference questions. This six-point scale classified transactions into categories arranged by level of complexity. Each level of the scale is defined by integrating the requirements to answer reference questions in such a way that there is an obvious correlation between the time and expertise needed to answer a question and the need to use resources or provide instruction. Although similar in structure to the Katz and Warner systems, the READ Scale offers more options to classify question types that reflect the work being done by reference professionals. Further investigation revealed the READ Scale had been piloted at a number of well-recognized institutions, including Indiana University, Kent State, Gettysburg College, and Notre Dame (Gerlich, "The READ scale"). A review of the information published regarding this pilot study (Gerlich & Berard, 2010) indicated that a number of facets necessary when incorporating a new classification scheme were discussed. The reviewed aspects in this article included: implementation; training; statistical review; and user satisfaction.

When deciding which method the Library would use to classify reference questions, each of these classification schemes had positive and negative elements that had to be considered. As mentioned earlier, the system previously in use at the Library was based on the Katz system, and the decision was made to implement a new system rather than revise the existing method. This conclusion was driven by concerns that the scheme would perpetuate the existing habits that led to misunderstanding how to classify reference questions. Additionally, this scheme did not provide enough detail in regard to the incremental complexity of questions, which relates to one of the concerns reference professionals have regarding how the statistics mirror the work being performed.

Although the Warner system appears to be an updated version of the Katz scheme, the consideration for time and effort provided in the definitions made it worth considering for the Library. Unfortunately, the Warner system considers that simple questions will be answered by anyone working in the library, while complicated questions will only be answered by a librarian. This binary approach

doesn't take into account the potential to employ staff members that have a great deal of experience and training that enables them to answer questions that fit into a middle range of complexity. When reviewing personnel needs for the reference desk, the Library needed to have a wider variety of options. With this in mind, it was decided to look for a classification scheme with more variance.

The last reference question classification system discovered in the review was the READ Scale. This system has a very well defined range of levels. A wider range of options for classifying reference questions provides a way to determine what level of expertise is needed for staffing purposes. Based on the findings of the study by Gerlich and Berard (2010), the clarity of the definitions of each classification level, the detailed review of how to implement this scheme, and the potential usability of statistics that measure each level of question complexity, the READ Scale was determined to be the most capable of reflecting the data collection needs of the Woodward Library for determining reference desk staffing needs.

### **About the READ Scale**

As a reference question classification scheme, the READ Scale reflects the amount of time spent on reference transactions, looks at the nature of the work, and is relatively simple to use when recording patron interactions (Gerlich and Berard, 2007). Developed at Carnegie Mellon University, the READ Scale categorizes reference questions on a scale of six levels. These levels are organized along a continuum labeled one to six, with level one questions being assigned to the simplest questions and level six questions being the most complex. For each level higher on the scale, the amount of expertise, time, and resources required becomes progressively more intense.

Level one of the READ Scale constitutes primarily directional questions that require no resources or expertise and take up very little time, such as "where is the water fountain?" or "what are the library hours?" Level two questions are still basic in nature and could be answered quickly by most staff working in a library; however, they may require some access to an information resource. These questions

could include call number inquiries, how to print a document, or where to find a book. At level three, the questions become slightly more complex and require more time from a skilled library professional. Answering questions at this level often requires some basic searching and the use of the library's resources to find an answer. Questions at this level may also require some instruction on how to use resources.

At level four of the READ Scale, reference interactions shift dramatically, becoming more complex and involving more time and skill on the part of the librarian. While many of these questions may not be as time-consuming for an experienced librarian, they do require more of an understanding of how to conduct research, how to handle many different resources, and how to narrow or broaden a search to find the requested information. Reference transactions that can be classified as level five tend to be more research-intensive, and can require more time with the patron and possibly a consultation with a librarian working within a specific subject area. Level five questions require a librarian to delve into the subject being researched to find more comprehensive or specific results.

Reference transactions that are labeled as level six on the READ Scale take the most time and effort on the part of the librarian. These transactions tend to result from a research consultation and most often involve the work of a subject specialist or a liaison librarian for a particular discipline. The large majority of these types of requests need more time than can be offered immediately, and often may take more than one day to fulfill. A good example of a level six query would be a request from a faculty member for a systematic review on a precise, specifically defined topic.

A follow-up study conducted by Gerlich and Berard (2010) investigated the views of academic librarians regarding the READ Scale. In this survey, 37.3% of the librarians responding indicated that the READ Scale was moderately easy to use, and 53.9% of the respondents said it was either "easy to apply" or "very easy to apply." Further information gathered from this survey showed that 80% of the librarians involved in this study reported they would either continue using this scale or continue using it with some changes to suit their needs.

### **Implementing the READ Scale**

In the spring 2015 semester, the Woodward Library began the process of implementing the READ Scale as its reference question classification system. In an effort to benefit from existing experience with implementing this scheme, the reference services coordinator contacted Dr. Bella Gerlich for advice on setting up the READ Scale. In reply, she provided a packet of information that included instructions on how to implement the system, explanatory materials describing the various aspects of the implementation process, a set of training questions, and samples of reference statistics recording sheets (personal correspondence, 2014). In the information supplied by Dr. Gerlich, the examples provided for recording reference transactions show the user writing numbers on a piece of paper. These numbers correspond to the READ Scale level of each question the reference professional answers. In one of the provided examples, the numbers are recorded under categories that correspond to how the questions were received. For instance, a student coming to the reference desk and asking a question about the location of a specific book might be tallied as a level 2 question under the category “walk-up reference.” In the other example, the questions were counted in categories that related to the types of resources used such as databases, technology, or reference materials.

Using the category options provided by Gerlich and Berard would have been a drastic change from the Library’s previously used tool for collecting reference statistics. In order to ensure a smooth transition, a meeting was held with the reference services personnel where the consensus was to create a tool that used the READ Scale levels as the categories to be counted. Additionally, the group decided that naming each level would create a counting tool that was easier to use. This decision was made in part to ensure that the new scheme would more closely match the Library’s existing data counting categories. Reference professionals were then asked to contribute potential titles to label each level of the READ Scale. The potential titles for each level were then entered into an online survey. The link to this survey was emailed to the group for a vote, with the results determining the titles for each READ Scale level. Level one was given the title “Directional,” which corresponds to the previous scheme; however, level

two was changed and given the title “General Assistance.” Level three was called “Quick Reference,” while level four became “Reference.” Levels five and six were also integrated into the previous counting tool under the terms “Research Consultation” for level five, and “Full Literature Review” for level six.

See *Figure 2*.

*Figure 2: READ Scale Compatible Version of Worksheet for Collecting Reference Transactions*

**Monday – Thursday Research Assistance Desk Transactions**

Updated 12/12/2014 [crb](#)

	Directional	General Assistance	Quick Reference	Reference	Research Consultation	Full Literature Review	*(also mark in other appropriate category)		
							Telephone*	E-mail Reference*	Chat Reference*
8:00–10									
10–11:30									
11:30–1									
1–3									
3–4:30									
4:30–6									
6–7									
7–8									
8–9									
<b>Total</b>									

Having the reference professionals at the Woodward Library take part in the process of adapting the READ Scale to the existing reference questions statistical collection method was beneficial to the process of adopting the new reference classification method. 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.

Once the decision had been made to use the levels of the READ Scale as the reference question categories and the levels had been named, everyone assigned to the research assistance desk received instruction and training on the nuances of this method. This instruction consisted of discussions between the Woodward Library’s reference services coordinator and reference professionals, who reviewed each

term used for the levels of the READ Scale, along with how to gauge what level to record for questions. Following these discussions, the Library's professionals were given an assessment packet that included a number of sample reference questions that were provided in the instructional resources sent by Dr. Gerlich. Included with these samples was a detailed training sheet that explained how to classify questions for each level, a list of questions, and a request to estimate the classification level for each answer. These questions were then returned to the reference services coordinator with their estimates regarding the level at which the sample questions should be categorized.

Reviewing the responses from the Library's professionals showed they had very similar views of the classification levels for the questions. The main discrepancy in their answers was between levels two and three and levels four and five. For example, one of the questions given was "I am researching post-war suburban housing development in the (city) region—can you show me what you have in the library that relates to this topic, or where I should look?" After discussing the responses with each professional, it was discovered that their answers varied based on the resources used and the estimated time it would take to answer these questions. Library personnel who were more familiar with the Library's resources labeled this reference question at level four. They felt the question would not take as much time, and would require little effort to discover the resources they would need to answer this question. However, reference professionals who were not as familiar with what the Library had available listed this question as a level five because it would take longer to answer since they would have to discover the best resources. This discrepancy led to a realization that the definitions listed for scaling these levels had to be open to a degree of interpretation to allow for differentiation based on the experience of the professional. When all the librarians working the reference desk used the same standards, this classification scheme became more cohesive and valuable for administrative use as well as professional validation.

Following the review of results and follow up discussions with individuals whose classifications had differed from the rest of the group, it was decided that no further training was necessary. At this point, the READ Scale-based statistical count sheet became the Woodward Library's official method for

tracking reference questions. Additionally, the reference services coordinator created an optional online version of this count sheet using LibSurveys, and made it available to reference personnel. The online version did not include the reference shifts because all entries were automatically time stamped. The other main difference in the print and online versions was that the online version had an option that allowed the user to include the question asked as well as the way it was answered.

### **User satisfaction survey**

Gerlich and Berard (2010) administered a survey designed to determine how reference librarians felt about the READ Scale classification method. The questions and potential responses to this survey were developed to determine the difficulty of using the system and the value of the information being collected. Results of the study showed that most users had no difficulty interpreting the READ Scale or applying the ranking system to the reference questions they were asked. The majority of users also agreed that there was a high level of value added by using this system. Although Gerlich and Berard did not explain what was meant by value, it can be interpreted to mean that the users believed that the READ Scale was more aligned with the work they were doing, and provided information that would be actionable.

The results from the survey were encouraging; however, the construction of some of the questions and response options may have unintentionally biased the results. For example, one of the questions was “Was the READ Scale easy to apply?” The answer options for this included “Very Easy to Apply,” “Easy to Apply,” “Moderately Easy,” “Somewhat Easy,” and “Not Easy” (Gerlich and Berard, 2010). In this case, the survey question, along with every potential response, contains the word “easy.” The word choice for this pairing weighs the answers to mean that the respondent felt that using the READ Scale was some level of easy, which creates a level of unintentional bias in the survey. Another example of this was the question, “Please rank your degree of difficulty using the READ Scale.” The response options for this were “Not Difficult,” “Somewhat Difficult,” “Moderately Difficult,” “Difficult,” or “Very Difficult.” In this instance, the presupposition is that the READ Scale is some level of difficult.

After implementing the READ Scale at the Woodward Library, the reference services coordinator and the library director decided to try to augment the results from the Gerlich and Berard study (2010) by determining if reference professionals at the Woodward Library had similar opinions. To do this, a user satisfaction survey was developed that was intended to determine if the READ Scale was collecting appropriate information, was easy to use, and was accurately representing the quality of work done by the Library's reference personnel. The questions in this survey were based on the questions in Gerlich and Berard's survey; however, the language used for the response options of the Woodward Library's user satisfaction survey was changed in an attempt to minimize potential bias and to improve the accuracy of the results. Some examples of questions in this survey include, "The reference transaction statistics collection method at our library is easy to use" and "I do not find it difficult to decide between labels when recording reference transaction." The potential responses to these questions were based on a seven-point Likert scale model (Barnette, 2010) with the following options: "Strongly Disagree," "Disagree," "Somewhat Disagree," "No Opinion," "Somewhat Agree," "Agree," and "Strongly Agree." The purpose of using these response options was to ensure the results of the survey would be unlikely to be unintentionally skewed toward any level of either ease or difficulty.

This user satisfaction survey was administered to the 14 reference professionals at the Woodward Library. All responses to this survey were anonymous, and the response rate was 100%. After the results were compiled, they were tallied to find the percentage of answers inclined toward agreeing or disagreeing with each survey statement. These values were then calculated to find statistical information that gauged the reactions of the users. See *Table 1* below.

Table 1: APSU READ Scale User Satisfaction Survey

**Question 2: The reference transaction statistics collection method at our library is easy to use.**

Strongly Disagree	Disagree	Somewhat Disagree	No Opinion	Somewhat Agree	Agree	Strongly Agree
0	0	0	1	3	8	2

**Question 3: The reference transaction statistics collection method we use accurately reflects the time and effort I put into reference transactions.**

Strongly Disagree	Disagree	Somewhat Disagree	No Opinion	Somewhat Agree	Agree	Strongly Agree
0	0	0	1	5	7	1

**Question 4: The reference transaction statistics collection method we use provides usable data.**

Strongly Disagree	Disagree	Somewhat Disagree	No Opinion	Somewhat Agree	Agree	Strongly Agree
0	1	1	2	2	7	1

**Question 5: I do not find it difficult to decide between labels when recording reference transactions.**

Strongly Disagree	Disagree	Somewhat Disagree	No Opinion	Somewhat Agree	Agree	Strongly Agree
0	0	2	0	4	8	0

**Question 6: I would benefit from periodic retraining/discussions regarding our reference transaction statistics collection method.**

Strongly Disagree	Disagree	Somewhat Disagree	No Opinion	Somewhat Agree	Agree	Strongly Agree
1	0	1	1	4	6	1

**Question 7: I am interested in seeing the results of a statistical analysis of the reference transaction statistics collection method at our library.**

Strongly Disagree	Disagree	Somewhat Disagree	No Opinion	Somewhat Agree	Agree	Strongly Agree
0	0	0	0	2	5	7

**Question 8: I would like to see changes made to the reference transaction statistics collection method used at our library.**

Strongly Disagree	Disagree	Somewhat Disagree	No Opinion	Somewhat Agree	Agree	Strongly Agree
0	3	3	5	1	0	2

**Question 9: I would like to try a new reference transaction statistics collection method at our library.**

Strongly Disagree	Disagree	Somewhat Disagree	No Opinion	Somewhat Agree	Agree	Strongly Agree
1	4	1	5	1	2	0

According to the results of the survey, 93% of the users (13 of 14) at least somewhat agreed that the READ Scale was easy to use (Question 2), and that the reference transaction statistics collection method reflects the time and effort being put into reference transactions (Question 3). In both of these instances, a single response of “No Opinion” was received. Seventy-one percent of the respondents (10 of

14) at least “Somewhat Agreed” that the READ Scale provides usable data (Question 4). Two of 14 respondents (14%) to Question 4 at least “Somewhat Disagreed.” The same number of people at least somewhat disagreed with the statement in Question 5, “I do not find it difficult to decide between labels when recording reference transactions.” On the other hand, 86% of the respondents (12 of 14) at least somewhat agreed with this statement. Even though the details of this survey cannot be equated exactly to the study done by Gerlich and Berard (2010), the results appear to corroborate their findings regarding the READ Scale’s ease of use. The outcome of the Woodward Library survey could be a result of user bias because the statistics from previous reference question classification scheme were neither analyzed nor used as a basis to implement any changes. In Question 6, respondents were asked if they would benefit from periodic retraining or discussions about how to record transactions for the READ Scale. Seventy-eight percent of the respondents (11 of 14) at least somewhat agreed with this statement. Moreover, 100% of the respondents at least somewhat agreed that they would like to see an analysis of the statistics from this system (Question 7). In fact, 50% of the respondents indicated they strongly agreed with this statement.

The last two questions of this survey carried the most varied responses. Forty-two percent (6 of 14) of the respondents for Question 8 at least somewhat disagreed with the statement “I would like to see changes made to the reference transaction statistics collection method used at our library.” However, 21% (3 of 14) of the respondents to this question at least somewhat agreed while 36% (5 of 14) of the respondents had no opinion regarding the statement. Question 9 had the same results, with 43% at least somewhat disagreeing, 36% having no opinion, and 21% at least somewhat agreeing with the statement “I would like to try a new reference transaction statistics collection method at our library.”

These results appear to indicate that Woodward Library professionals are reasonably confident in their ability to categorize reference questions, and that they believe the READ Scale is relatively simple to understand and to use. However, these ratings also show that the reference professionals surveyed believe that training or discussion about the methods used to collect reference transaction data would be

useful. Conversely, survey results show that there is little interest in changing the reference tracking method already in use. This may be explained by the fact that the modified READ Scale system was a new implementation, and users were interested in utilizing the new system for more time before drawing conclusions about its effectiveness.

The results of the survey demonstrate that respondents believe the information provided by tracking questions via the READ Scale provided useful data and accurately gauged the work being performed at the reference desk. It was interesting to note that most Woodward Library professionals wanted to see an analytical review of the questions asked. This is most likely a result of their interest in knowing what types of questions are asked most frequently. It is also likely that the respondents have an interest in determining peak hours of the reference service because this knowledge may potentially impact service hours. Changes in the reference desk service hours will also have an effect on staff in other service areas. If reference desk service hours were to be decreased, then the frequency of questions asked at other service points may increase, and staff at those locations may need training to develop stronger skills for answering reference questions.

### **Findings/Discussion**

Researching and implementing a new reference question classification system at the Woodward Library provided many interesting insights into how reference questions are categorized, the difficulties inherent in categorizing questions, and how reference statistics are viewed by the Library's reference professionals. When searching the literature for methods of classifying reference questions, there were no specific subject index terms listed for this topic. As a result, many articles discovered in the literature were discussions about tools used for collecting statistics rather than reviewing the definitions of reference question classification categories, and more importantly, the distinctions between them. Checking the associated subject headings from relevant articles found in the literature searches provided no useful searching strategies. This left searching the references lists of the related articles as the best

option for finding further information on the topic. This reveals a definite need for the profession to determine how information on reference question classification should be indexed.

After deciding that the Woodward Library would use the READ Scale, it was important to adapt the methodology to its specific needs. One of the lessons learned while implementing the READ Scale was that setting the levels to resemble the categories already in use ensured a smoother transition to the new classification method. Any library wishing to utilize the READ Scale should consider adapting it to their reference classification system and data collection tool already in use. This facilitates the transition to a new method for reference personnel because using terms and resources that are already familiar can encourage a greater degree of understanding and cooperation when introducing a new system.

Looking at the results from the Woodward Library's survey, it became evident that useful information could be gathered by surveying the implementation methods at other institutions which use the READ Scale. To corroborate, refute, or amplify our findings, a broader survey of READ Scale use in academic libraries is recommended. Analyzing additional survey results could provide some valuable information regarding the impact of how this system is implemented and how satisfied users are. Comparing these results with the results from the Woodward Library has the potential to show implementation methods that may make transitions to the READ Scale more successful. In addition, because many academic libraries use other reference question classification methods, reviewing and comparing their survey responses may yield information regarding whether the READ Scale has better, worse, or comparable user satisfaction ratings.

Even though the results of the user satisfaction survey conducted at the Woodward Library indicated a number of positive results for the READ Scale, there were some statistical responses which raised questions. Two responses in particular could benefit from further study. The first question and response was regarding the interest of Woodward Library personnel in seeing an analysis of the reference statistics being tracked and compiled. The second question and response involves the lack of interest in trying a new reference classification method, or even making changes to the current system. Although the

result from the first response is likely due to interest in validating their expectations regarding reference usage, and the second a desire to give the newly-implemented system an opportunity to work, both of these results could benefit from a more detailed study which evaluates these aspects of user satisfaction.

Looking over the statistics from the first semester of using the READ Scale provided a number of useful insights that led to changes in the service. The statistics from the spring semester showed that a third of the questions asked were “Directional” or “General Assistance.” As a result of this information, the Library director and reference services coordinator determined that the library’s professionals could spend less time at the desk. The decision was made to move to an “on-call” service in the evenings and weekends. Library staff and student workers would answer less complicated questions, but were trained to know when to contact reference professionals when questions became more complex. This meant library professionals would be available and accessible as needed. Using the statistics to determine the feasibility of moving to a new reference service model showed that the data from the READ Scale provide more clarity to the decision making process.

## **Conclusion**

While the value of academic librarians providing reference service to patrons is obvious to those who utilize such services, there are often occasions when libraries must justify their use of personnel and resources. In those cases, not having data that provides evidence of the reference work being done, or not having relevant data, or not having a cohesive statistical procedure, can be detrimental to the library’s continuing efforts at improvement. A reference question classification scheme is an invaluable tool for providing information that not only shows the amount of reference usage a library is asked for, but also conveys evidence that can be used to make administrative decisions about reference service staffing, hours, and policies. After reviewing the reference question classification statistics at the Woodward Library, the reference services coordinator and the library director determined that a change was needed to provide better statistical information. The data being gathered by the system that was previously in place had categories that were ill-defined, and the Library’s reference professionals often had difficulties

making distinctions between them. This led to a lack of confidence in the value of the reference data being tracked, which in turn led to a lack of understanding about the value of the reference services being provided. Ascertaining the Library's reference data needs provided significant insight and context for deciding to revise the Woodward Library's reference statistics collection method.

Although searching the literature for potential reference statistics systems was complicated by poor indexing, several reference classification methods were discovered. When comparing potential schemes to the needs of the Library, it was decided that the READ Scale would be the best fit. Both the Katz and Warner methods had the same number of categories as the existing system. However, there were concerns about their ability to reflect the work being done and the professional levels needed at the reference service desk. The ability to adapt the READ Scale to the pre-existing reference method, along with the available implementation and training materials were the primary factors in this decision. Once the READ Scale was selected, the Library began the process of changing to this new reference question classification model. Throughout the implementation process, the Library's professionals were consulted and given opportunities to provide input into the way the new system would work. This input led to the addition of titles for each level of the READ Scale, retaining a useful element of the old system while allowing for a way to tabulate reference statistics that were far more meaningful.

After all the adjustments were made to the new system, the reference services coordinator facilitated a training program to help the reference specialists develop a level of proficiency in its use. The Library then incorporated the READ Scale into the workflow of the reference desk. The following semester, library professionals were asked to respond to a survey that was designed to measure their level of satisfaction with the new classification method. The results from the survey indicated that the reference professionals found the READ Scale easy to use, while providing insightful data to the department. Based on these results, the implementation of the READ Scale at the Woodward Library was judged to be a success. Future users of the READ Scale may find that adapting it to an existing system and including the library's professionals in the implementation process will develop a greater level of acceptance by

reference personnel. These levels of acceptance may also be beneficial as the system is more reflective of the work that is being performed, and can determine what level of professional needs to be available at the reference desk. Further studies to investigate the various methods used for implementing the READ Scale would be valuable for helping to develop best practices.

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