Midwinter Online Conference 2023

Questions from Session 2: From Scratches on Paper to Auto-Generated Pivot Tables: The Evolution of Reference Statistics at SUNY Morrisville, by Angela M. Rhodes (SUNY Morrisville)

Q1: How do you define long and short reference questions? Does that accurately differentiate how much experience the librarian needs to effectively assist the person? Also, do you track the category (students, faculty, administrators) who make the requests?

Short and long reference questions are determined purely by time with patron. Five minutes or less is a short question, more than five minutes is a long question. It does not reflect on expertise, which for us isn't so important as the contact time with a patron. At the moment, we do not differentiate between categories of patrons. That often requires a more probing question that we may not need an answer to (knowing that 90% of our customers are students doesn't really change our services much, but at a bigger institution where you might want to differentiate between undergrad and grad students, yeah that might matter).

Q2: Do you have to refresh the pivot table or is there some way to set up pivot tables to auto-refresh when it is opened?

The pivot tables refresh automagically. There is a setting available by right-clicking on a pivot table, then selecting "settings". Under Pivot Table Settings there is a check box option under "Refresh and Save": one for "Save source data with file" and one for "Refresh data on file open".

Q3: Have you promoted your services to the academic programs that don't promote library usage to their students?

I'm sure this is not unique to our situation, but we generally have academic programs that utilize our services heavily, and others that barely make any use of us at all. Promoting services becomes a task that we try to accomplish through our librarian liaisons to each department, but with each of us taking on so many programs, that sometimes isn't possible to promote as well as we could.

Q4: How did you determine which options to put in the drop down under the "Type" question in the form? PS Can you show us that again?

The options for "Type" which is a choice button rather than a drop-down are: Behavior Problem; Location/Contact; Supplies; Paper/Equipment; Software; Social Interaction; Short Reference; Long Reference. The drop-down options available under the next question of "Topic" is a branching option depending on whether Software or Reference is selected. For Software, we have: Networked Printer Installation; Wireless Network Access or Setup; Morrisville Account Access or Setup; Blackboard; Microsoft Office Suite (formatting, fuction, etc.); College Online Platforms (Web for Students, Pearson, E-textbooks); and Other. For Reference, we have copied and pasted our course prefixes into the list, as well as a more generalized subject headings list if the question is not tied to a particular course, and then ordered them alphabetically other than bumping what we know to be our most popular ones to the top of the list for ease of use. The choice for what to put in each of those topics (at least for Software) was generally based on what we tended to spend a lot of time doing, and the Reference Topics were selected to be the courses from which the question or need arose so that we had a clearer idea of which faculty members/courses were utilizing our services most heavily. I have included a link to a template you can use/view: https://forms.office.com/Pages/ShareFormPage.aspx?id=SU3_If3AREGcBf-_I6vTK_GsIjnAvt9MnuuirmPrrsJUMVNXWVNTS1RLQUozUEtXSkdLR01FSjdXTyQlQCN0PWcu&sharetoken=tjlsZvm3lwJJkzE3ro7B

Q5: Do you have any across-campus effort to share data? We've had similar problems demonstrating student impact while accounting for anonymity.

I presented this new data collection technique at a recent professional development conference with the hope of not only sharing this kind of data but also working together to gather data more effectively across academic support services. The data that we do collect throughout the year is of course a part of our publicly-available annual reports, but I'm honestly not sure who else is looking at this data. We do plan to reach out to programs that use our services heavily to work on more collaborations though, especially for Nursing. Our next big hurdle is somehow finding a way to connect our services with student success, and yes, anonymity is our biggest challenge right now.

Q6: I love that you have the category "social interaction." What made you decide to include that category?

The Library is well aware of the fact that we are a centralized part of the campus, the community, and to some degree, the culture. We have observed that people will want to just come into the library to talk with us, not necessarily related to them needing our help with something, but just to sit down in our chair and have a chat. Our library staff and faculty make deep connections with students, faculty, and staff that we think translates to our impact on the social community of the campus, and we all know that research shows that when a student makes a connection to someone on campus, they're more likely to be retained (and we all know how vital retention is). We think that community-building really is an important part of what we do at the reference desk.

Q7: I didn't understand if you are able to sync Microsoft Form with Excel

Microsoft Forms creates a table in Excel for responses. When opening the form responses, an option is to export the responses to Excel, and since it's the OneDrive version, it will cloud sync new responses.

Q8: Could you feed this data into a data warehouse and then into power BI?

The data is in a simple Excel table, so I imagine that an export to another program would be simple. I have little experience using BI, so I'm just not sure of the capabilities. If I had more time I would probably dive into some of the fancier BI powers, but at the moment pivot tables gets the job done.

Q9: Have you thought of using the READ scale?

I was unaware of the READ scale, so no, we did not consider it when creating our Reference tally sheet.

Q10: I am a medical librarian and I do a lot of research for nurses. A typical search takes between 30 and 60 minutes, including downloading articles retrieved. Are there plans to enhance your statistics to more accurately capture this information?

Based on our first year of using this enhanced data collection method, we may very well change or tweak the way we collect data. I think the bigger thing to keep in mind is to make sure you're not needlessly collecting data. If it cannot be directly used to impact or change how we deliver a service, change how we do outreach and instruction to programs, or illustrate our impact to various constituents, then I don't see the need to capture it.

Q11: We do something similar with Qualtrics, but it's interesting how you're collecting data on the courses and IT issues. We also use length of time by minutes/complexity, how they contacted us, kind of patron, which campus we are on, and what kind of employee (we have student workers on reference, too).

I was certainly interested to hear how other libraries are keeping track, because my two institutions that I've been with started with paper and pencil at the desk. Something as "messy" as this kind of qualitative data has its challenges to collect. Thank you for sharing.

Q12: Have you found that your new ability to show the timing, periodicities, and volume of the work are reflecting in staffing/planning?

Since we only have one semester of data under our belts, we are not ready to change things just yet. However, based on the Fall semester trends, there are several things we are considering, mostly related to outreach to the Nursing program, outreach to IT to address installing networked printers, and perhaps adding a librarian to the desk at 8:30am instead of 9am.

Q13: Excellent use of Excel -- what were your strategies in learning / perfecting use of Excel?

I'm a self-taught Excel guru. I dived into using it about fifteen-ish years ago, and I've just expanded my knowledge as I used it to answer more questions, analyze more data, and get creative with its capabilities. Google is your best friend when you want to find a way to use Excel to do something fancy... luckily there's always a bigger Excel guru that has come up with the answer you're looking for.

Q14: If you have a 45 min interaction with two or three very different questions, would you count it as only 1 long interaction?

If the interaction was all on the same topic or question, then it would count as one long reference transaction. If there were several layers of questions, perhaps getting them on the wireless, finding an article for them, and showing them how to use Blackboard, that would be three different tallies.

Resources/insights shared by attendees in chat:

- If you don't have Microsoft Teams - Google Forms can do something similar! We use it for patron count data
- Our library has used a Google form + Tableau for several years
- We've been using LibAnswers/Springshare products for collecting reference stats
- We use Gimlet - they will do sliding scale - https://gimlet.us/pricing
- We use a program called Gimlet, but it doesn't have the flexibility of immediate Excel output for use with pivot tables that can be refreshed
- At previous institutions I used LibAnswers/Springshare for reference questions. This helped identify peak times and opportunities for outreach and instruction.
- FWIW, the Looker Studio from Google has data freshness of 15 minutes at best
- Springhare Libsight is another alternative for reference data collection. Amazing work building your own system.
- Here's an Excel hash function you can use to anonymize strings https://drive.google.com/file/d/17FsOyyr9RkwWj0Ug1tbyqJ5sSljGSjjg/view
- We use LibInsight- one form to track Reference transactions and one form to track instruction and liaison work
- We have a similar set up in Google Forms into Google Sheets minus the visualization
- Invisible labor: https://crl.acrl.org/index.php/crl/article/view/25683/33594
- READ Scale: readscale.org
- The READ Scale (Reference Effort Assessment Data) is a six-point scale tool for recording vital supplemental qualitative statistics gathered when reference librarians assist users 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.