Reference Work Changes Lives – Capturing Your Impact

Aligning Reference Transactions with Stakeholder/Community Outcomes

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Hello, Hiya, Howdy....

Hi I am Erin...

Hi, I am Rick...

Overview:

1. Introductions
2. Building Blocks to Capture Impact
3. Activity - Building Blocks Mapping Exercise
4. University of Idaho - Experience
5. Washington State University - Experience
6. Reconsidering your Reference Form
7. Wrap up

Reference Services are what we measure...

If reference measures questions/answers… we are about questions/answers

- *Who?* -- Who is asking? (adult, child, student, faculty, etc.)
- *What?* -- What is the question?
- *Where?* -- Where did the question occur? (in-person, office, online, phone, etc.)
- *When?* -- When did the interaction take place? (time/length)
- *How?* -- How was the question answered? (resources used)
- **<u>WHY?</u> -- DO WE CAPTURE THIS?**

WHY do patrons ask reference questions?

*In order to complete a homework assignment (**Why?**) so they can pass a class (**Why?**) so they can get a diploma or degree (**Why?**) so they can be successful in life.*

-- Let's start asking WHY? --

If we measure why people use libraries/reference services then we connect more with how libraries change lives -- then libraries/reference services become about changing lives not simply answering questions.

Building Blocks: Mapping to Community Value

WHO are your community/academic community stakeholders?

What is your are your community/academic community stakeholders' "WHY"?
Why should they value the library?

Toronto Public Library's Strategic Plan

TPL strategic plan 2016–2019 priorities	City of Toronto key strategies							
	City of Toronto Strategic Actions 2013–2018	Raising the Village	Toronto Middle Childhood Strategy	Toronto Newcomer Strategy	Toronto Poverty Reduction Strategy	Toronto Seniors Strategy	Toronto Strong Neighbourhoods Strategy 2020	Toronto Youth Equity Strategy
advancing our digital platforms					✓			
breaking down barriers to access, driving inclusion	✓			✓	✓	✓	✓	✓
expanding access to technology and training			✓	✓	✓		✓	✓
establishing TPL as toronto's centre for continuous and self-directed learning		✓	✓	✓	✓	✓	✓	✓
creating community connections through cultural experiences		✓		✓		✓	✓	
transforming for 21st century service excellence	✓							

context & trends

poverty

One in five adults and one in four children live in poverty in Toronto. The City's Poverty Reduction Strategy focuses on addressing immediate needs through essential services; creating pathways to prosperity through job creation and investment; and driving systemic change through more accountable and participatory government.

inequality

Toronto has been called a "divided city" with concentrated poverty, unemployment, and other socioeconomic problems in specific geographic areas. The City has identified 31 Neighbourhood Improvement Areas (NIAs) where investments in infrastructure and programs are aimed at strengthening communities and improving outcomes for local residents.

employment: the hourglass economy

Toronto's unemployment rate has returned to its pre-recession level and now sits at 6.9% overall, but the types of jobs available have changed. The "hourglass economy," where employment is concentrated at the high and low ends of the income spectrum, has created a gap between part-time, low-paid workers and those with high-skilled, high-paying jobs.

For all workers, including those in the high-skill, high-pay sector of the economy, short-term or contract work is becoming common, meaning people have less job security and greater responsibility for their own professional development.

More seniors are remaining in the workforce either by preference or due to financial necessity, but those over age 55 who lose their jobs struggle to find new employment. Access to technology, along with training and support, can help older adults refresh their skills and stay connected.

youth unemployment

Unemployment among youth is significantly higher than for the population as a whole, hovering between 15 and 20% over the past decade. Youth from newcomer, visible minority, indigenous, low income, and LGBTQ communities are more likely to be unemployed.

Barriers to youth employment include a lack of networks, mentors, role models, and opportunities for meaningful work experience. The City's Youth Equity Strategy seeks to coordinate efforts across different City agencies and departments to address these issues.

education

An educated workforce is key to the city's ability to attract investment and employment. Technology-driven change and an emphasis on continuous learning and other 21st century competencies mean that education is now a lifelong process. Formal education is increasingly supplemented with online courses and tutorials, as well as in-person experiential learning at meet-ups, hackathons and maker spaces.

Schools are changing their traditional emphasis on language-centered learning as part of the "multiple literacies" approach, which recognizes the need to support visual, auditory, spatial, and other learning styles. There is a greater focus on shared learning experiences, interactive skills, and problem solving, with extensive use of multimedia and information technologies.

children and families

The influence of early childhood experiences on success in later life has been widely documented, as have the risks to children growing up with social and economic disadvantages. Services and supports are available to help children and families in Toronto, but the system is complex, fragmented and often difficult for parents to navigate. Organizations across the child and family services sector are coordinating their strategies and developing shared outcomes to better serve Toronto families.

the digital divide and the cost of connectivity

Internet access has become essential to full participation in society. While the divide separating Internet users from non-users has diminished over time, factors including income level, age and education persist as barriers.

Canadian families spend between $100 and $212 a month for communications services, depending on household size, and in low-income households, this expense represents, on average, 7.7% of their monthly income – their largest expenditure after shelter, transportation and food.

digital government

In Canada and internationally, governments and their agencies are applying the culture, practices, processes, and technologies of the Internet era to respond to citizens' expectations and deliver services more efficiently and effectively.

By leveraging new developments (including Cloud technology, the widespread adoption of mobile devices and more sophisticated analytics tools), governments seek to improve access to services, increase civic engagement, and better evaluate program outcomes.

lifestyle trends

Despite the constant connectivity new technologies enable, many people report feelings of social isolation. For an aging population, this problem is more acute: 22% of Torontonians age 55 and older, and 44% of those over age 85, live alone.

23% of Torontonians report having high levels of stress. Family, job, and money worries contribute to stress levels, and working adults who care for children or aging parents struggle with time management. To meet the needs of busy families, services must be convenient and easy to use.

culture

Participation in arts and culture activities has been linked to civic engagement, volunteering, and community connectedness. Toronto residents believe the arts make the city a better place to live, but 55% say cost is a barrier to attending cultural events.

literacy and reading

Reading is a foundational skill for success in education and work. Canada has a higher-than-average proportion of its population at both the high and low ends of the literacy proficiency scale – many Canadians are avid readers, but 17% of the adult population has low literacy skills.

Reading for enjoyment has been linked to benefits ranging from higher incomes to better mental health. Between 2010 and 2014, the percentage of Ontario children who report that they like to read declined from 50% to 47% among students in Grades 3 and 6.

Can library reference interaction data be mapped to stakeholder value?

Are libraries gathering appropriate data that demonstrates the value of our library's reference services to stakeholders?

Can we re-examine our reference interactions both big and small in order to realign them to community impact?

Building Blocks: Re-examine Every Question

Small interactions can matter -- for example:

   The humble "How do I print?" question can be...
      ...a digital divide issue
      ...a workplace readiness issue
      ...a lifelong skill issue.

Building Blocks: Deconstructing Interactions

Much happens during a reference interaction... but do we capture it all?

Q. "How do I find a book on whales?"
1. Show library website
2. Explain keywords
3. Explain shelving system (e.g. Dewey / LC)
4. Interlibrary Loan

Activity: Mapping Building Blocks

1. Break into 3-7 groups
2. Each group will be given a topic (poverty, digital divide, employment, etc.) and brainstorm as a group the building blocks from reference interactions or reference encounters that might relate to that topic.
3. After 5 minutes we will change topics and repeat brainstorm.
4. Report out.

Community Topic

Example: *Unemployment*

Reference Questions that support topic

How do I become a nurse?

Reference Actions that Support Topic

Keywords about employment
Reputable job sites

Searching catalog for nursing books

Reference Summit 2019 : Activity #1: Building Blocks

Why the reference building blocks mapping exercise?

We would like you to take this idea of reference building blocks and reconsider our reference in-take forms. Deconstruct what happens at the reference desk and rebuild our forms to reconsider the WHY of the reference interaction and map to areas of impact and value to your communities or stakeholders.

University of Idaho Experience

Pilot Project

Pilot Project

Three Phases

Phase 1:
Analyze current statistics

Phase: 2:
Redesign reference form

Phase 3:
Analyze pilot project statistics

Phase 1: Stakeholder value, building blocks and mapping

- Analyzed 300 questions from original in-take form
  - Types and frequency of interactions
    - Ignored "directional" questions

  - Tested possible mapping to:
    - ACRL Information Literacy Standards
    - AACU Value Rubrics / Campus Learning Outcomes

Action / Building Blocks (with Reference Question Level)	AACU VALUE Rubric	University of Idaho *Learning Matters* Learning outcomes	ACRL Information Literacy Competencies
Navigate Building/Website (Basic)	Directional Question	Directional Question	Directional Question
Known Item Search (Basic)	1. **Access Needed Information** (Information Literacy) 2. **Evidence** (Critical Thinking)	**Sources and Evidence to Accomplish a Specific Purpose** (Communicate)	**Access** (Standard 1)
Clarify Information Need/Source (Intermediate)	**Determine Info Need** (Information Literacy)	**Sources and Evidence to Accomplish a Specific Purpose** (Communicate)	**Determine Info Need** (Standard 2)
Suggest Keywords (Intermediate / Advanced)	**Define Problem** (Problem-Solving)	**Define Problem** (Think and Create)	**Access** (Standard 1)
Refine Research Topic (Intermediate / Advanced)	1.**Topic Selection** (Inquiry & Analysis) 2. **Define Problem** (Problem-Solving)	**Define Problem** (Think and Create)	**Access** (Standard 1)
LC Call Number Overview (Basic)	1. **Access Needed Information** (Information Literacy) 2. **Transfer** (Integrated Learning)	**Transfer** *Adopts and applies skills...* (Learning and Integrate)	**Access** (Standard 1)
Database/Catalog Demo (Intermediate / Advanced)	1. **Access Needed Information** (Information Literacy) 2. **Transfer** (Integrated Learning)	**Transfer** *Adopts and applies skills...* (Learning and Integrate)	**Access** (Standard 1)
Summit / ILL Process (Basic)	1. **Access Needed Information** (Information Literacy) 2. **Transfer** (Integrated Learning)	**Transfer** *Adopts and applies skills...* (Learning and Integrate)	**Access** (Standard 1)
Evaluated Resources (Advanced)	1.**Evaluating Information** (Information Literacy) 2.**Evidence** (Critical Thinking) 3.**Existing Knowledge** (Inquiry/Analysis)	**1.Evidence** (Think and Create**)** **2.Sources and Evidence to Accomplish a Specific Purpose** (Communicate)	**Evaluates** (Standard 3)
Citation / Copyright Info (Advanced)	**Access Ethically/Legally** (Information Literacy)	**Application of Ethical Perspectives and Concepts** (Practice Citizenship)	**Ethically & Legally** (Standard 5)

Phase 2

- Redesigned form
  - Make it easier to capture librarian learning interactions
    - Menu of actions = less typing
  - Sought librarian input for possible additions / wording
    - Added *Navigate Building / Website*

Add Transaction: Reference ▾

❓

Q | Type the question (140 chars max) |
🔄

Type more detail (optional). 1000 chars max.

A | Type the answer here. |

☐ **Include this transaction in the public knowledge base.** What is this?

See if similar questions are already in the public knowledge base?:

| | Search |

Time Stamp:
◉ **Current** ○ **Edit Date/Time**

Answered By:
Stoddart, Rick ▾

Internal Note: help
| |

Location	Patron Type	Question Format	Question Type	Time Spent
Reference Desk	Student	In-Person	Reference	0-2 minutes
Office	Faculty	Phone	Directional	3-9 minutes
On Call	Staff	Email	Advanced Reference	10-19 minutes
Satellite Desk	Community	IM	Follow-Up	20+ minutes
Remote	Unknown	Text	Circulation	
	Other			

Add Transaction: Reference ▾

Q | Type the question (140 chars max)

Type more detail (optional). 1000 chars max.

A

Type the answer here.

☐ **Include this transaction in the public knowledge base.** What is this?

See if similar questions are already in the public knowledge base?:

[Search]

Time Stamp:
◉ Current ◯ Edit Date/Time

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Remote	Unknown	Text	Circulation	
	Other			

Primary Action with Patron	Secondary Action with Patron	Third Action with Patron	Question Level	
Navigate Building/Website	Navigate Building/Website	Navigate Building/Website	Basic	
Known Item Search	Known Item Search	Known Item Search	Intermediate	**Submit**
Clarify Info Need/Source	Clarify Info Need/Source	Clarify Info Need/Source	Advanced	
Suggest Keywords	Suggest Keywords	Suggest Keywords		
Develop Search Strategy	Develop Search Strategy	Develop Search Strategy		**Submit & Clear**
Refine Research Topic	Refine Research Topic	Refine Research Topic		
LC Call Number Overview	LC Call Number Overview	LC Call Number Overview		
Database/Catalog Demo	Database/Catalog Demo	Database/Catalog Demo		What's the difference?
Summit ILL Process	Summit ILL Process	Summit ILL Process		
Evaluate Resources	Evaluate Resources	Evaluate Resources		

Phase 3

- Analyze use of new form
- Time Period: 10 weeks - Fall 2016
- Questions: 1125
  - 428 associated with information literacy/learning outcomes (38%)
  - 344 <u>student</u> interactions associated with information literacy/learning outcomes (31%)

Reference Interaction	Primary	Secondary	Third	Total
Known Item Search	173	10	1	184
Clarify Information Need / Source	80	10	3	93
Suggest Keywords	40	19	4	63
Develop Research Strategy	31	32	7	70
Database / Catalog Demo	27	57	21	105
LC Call Number Overview	25	25	20	70
Summit / ILL Borrowing Process	22	38	13	73
Evaluate Resources	14	6	14	34
Refine Research Topic	10	11	11	32
Citation / Copyright Info	6	1	1	8
Total Learning Outcomes	**428**	**209**	**95**	**732**

Information Literacy - ACRL Standards

Of the 732 learning interactions that were captured 82% (597) can be associated with ACRL Standard 1 - Access

13% of reference learning interactions can be associated with ACRL Standard 2 - Determine Information Need.
(93/732)

Only 5% (34) can be associated with ACRL Standard 3 - Evaluate
and only 1% can be associated with ACRL Standard 5 - Ethically/Legally (8)

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Evidence-Based Learning Outcomes Statements

Library level:

"*Suggest a Keyword* and *Refine Research Topic* are mapped to the University of Idaho critical thinking learning outcome of Define Problem. With data from this new form, the library can say that University of Idaho librarians had 113 student interactions that supported the campus-wide learning outcome of Define Problem."

Evidence-Based Learning Outcomes Statements

Librarian level:

I had 117 research related reference questions with students from Pilot Project. Based on the data provided from this pilot project, 66% of these students interactions were associated the <u>Transfer</u> competency found in the Think and Create outcome of University of Idaho Learning Matters learning outcomes. An additional 40% of my student reference interactions were associated with the <u>Communicate/Sources</u> and <u>Evidence to Accomplish a Specific Purpose</u> outcome. At the reference desk, I worked with students 7% of the time to help refine their research topic and suggest associated keywords. These encounters allow students to work on building the competency of <u>Defining the Problem</u> under the Think and Create university learning goal. Finally, 4% of these student reference encounters supported the learning outcome competency of the <u>Application of Ethical Perspectives</u>.

(Note, these percentages do not add up to 100% because often multiple learning outcomes were being addressed during each student interaction.)

More info on Idaho experience...

Stoddart, Rick, and Beth Hendrix. "Learning at the Reference Desk: A Pilot Project to Align Reference Transactions with University Learning Outcomes." *The Journal of Academic Librarianship* 43, no. 1 (2017): 3-7.

Washington State University

How we did it! (In progress)

How we did it

- Reviewed all REFERENCE-coded transactions from the past year (=2103) at our largest library's reference desk.

- Reference services coordinator created a set of transaction types that matched the more specific interactions (=8). Reference librarians met as a group to work out wording and definitions.

- Also based on what we assist students, faculty, and the public with in general!

- Added primary and secondary interaction clicks to the form.

How can you tell if an article is peer reviewed?

- Evaluate Resources

How to find peer-reviewed articles about the Volga River, what is an encyclopedia article, how do I cite these things?

- Evaluate Resources
- Source Discovery
- Citation Help

I am just SO SO confused by the stack chart?!?!?!

- Item Location
- Navigate Building/Website

- Known Item Search
- Item Location
- Refine Topic
- Source Discovery
- ILL/Summit/Request
- Navigate Building/Website
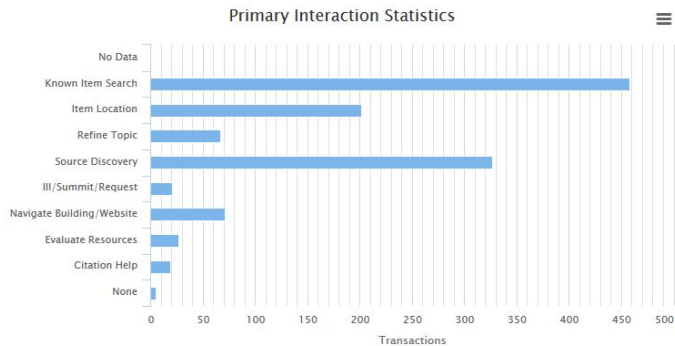- Evaluate Resources
- Citation Help

Fall: Results (85% completion!)

Primary Interaction

Value	Count	%
No Data	0	0%
Known Item Search	458	38%
Item Location	202	17%
Refine Topic	67	6%
Source Discovery	327	27%
Ill/Summit /Request	21	2%
Navigate Building/We bsite	71	6%
Evaluate Resources	27	2%
Citation Help	19	2%
None	5	0%

Primary Interaction Statistics

Secondary Interaction

Value	Count	%
No Data	315	26%
Known Item Search	16	1%
Item Location	265	22%
Refine Topic	20	2%
Source Discovery	68	6%
Ill/Summit /Request	111	9%
Navigate Building/We bsite	227	19%
Evaluate Resources	36	3%
Citation Help	16	1%
None	123	10%

Secondary Interaction Statistics

Other stats (Known Item Search)

Other stats (Known Item Search)
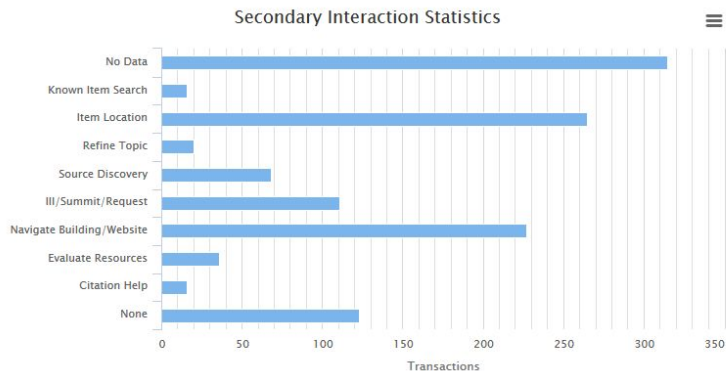
Mapping it: What we can do now

- Most important to us now: [Student Learning Outcomes (UCORE)](#) - we are lucky enough to have "information literacy" be a university-wide learning outcome, but what else do we contribute to? [UNIVERSITY-WIDE]

- Drive to 25: The University is aiming to be a top-25 public research university within the next few years. Eleven (11) metrics are being used to reach this goal. Can we map any of our transactions at the desk to these metrics? [UNIVERSITY-WIDE]

- ACRL Standards: Skills in information literacy to determine if we are meeting professional standards for educating students. [LIBRARY-WIDE]

Let's look at ONE of these mapping thingies.

Student Learning Outcomes - UCORE at WSU.

The map!

The reference desk supported the WSU UCORE outcome Creative and Critical Thinking goal of helping students develop skills in using "reason, evidence, and context to increase knowledge." We did this by interacting with 1,197 patrons in areas such as research topic refinement, resource discovery, and resource evaluation during the Fall 2018 semester.

The reference desk interacted with 458 patrons in Known Item Searches during the Fall 2018 semester. By assisting patrons in using the online catalog to find appropriate sources for their research, this supports the WSU UCORE outcome of Creative and Critical Thinking through increasing student skills in using "reason, evidence, and context to increase knowledge."

How did it go? Successes!

- 85% participation rate! We have students work the desk more hours than librarians and they are pretty good at doing what they are told.

- Visually highlighted what we do and do not do at the desk. Can work in tandem with library instruction, workshops, etc. to ensure students get the skills they need outside of help-seeking. (Example: Evaluation; but maybe this is so integrated that it's difficult to quantify?)

- Highlighted where we need to do more outreach to let people know what we do. We're not just about finding books, but how do we let people know that?

How did it go? Needs Improvement.

- Continual negotiation of meaning of the clicks. Navigate building/website - how does that differ from item location/database navigation/etc.? Do I need to click for tech-or just reference?

- Discovered inconsistencies with recording (mostly basic mistakes, but how often does this happen and how does it impact our data collection?).

- Low "Evaluation" numbers - but how do we really separate this from something like "source discovery?" Aren't we helping them evaluate too? Perhaps these categories over-simplify what we do?

- Things don't always cleanly map to one another.

Conclusion #1

You are what you measure

Consider adding community context to reference forms

Measure the "why" of the question to communicate value to community

Conclusion #2

You are what you measure

Revisit your reference form. Consider…

1. Adding a question mapped to community outcomes (e.g. digital divide question)
2. Full-blown mapping of reference actions to community outcomes like UIdaho or WSU

Activities that Occur at Your Reference Desk

Example: *Keyword brainstorming*

Common Questions at your ref Desk

How do I print?

Topics of value to your communiy that this might map to

Digital Divide, Technology Training, etc.

Reference Summit 2019 : Activity #2: Reconstruct your Own Reference Form

Questions?
Comments?
Suggestions?