Using the READ Scale for Staffing Strategies

The Georgia College and State University Experience

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In the spring of 2007, Georgia College and State University (GCSU) participated in a national study to test the READ (Reference Effort Assessment Data) Scale. The READ Scale is a six-point scale tool developed by Bella Karr Gerlich 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 skills, knowledge, techniques, and tools utilized by the librarian during a reference transaction (see figure 1).

The purpose of the national study, a collaborative effort between GCSU Library and Instructional Technology Center and Carnegie Mellon University Libraries, was to test the validity of the READ Scale as an additional tool for gathering reference statistics and record the value-added services, effort, knowledge, and skills used during the reference transaction. This article demonstrates how GCSU used the READ Scale study data gathered at their institution to record user behavior and to reconfigure their service hours to best utilize staff at the reference desk at peak times for improved services and utilizing faculty and staff talent during critical need.

Training Reference Staff/Calibrating the READ Scale

As part of the study group, reference staff pretested the READ Scale prior to implementing the study for two weeks in January 2007. All institutions selected from a series of sample questions provided by the researchers to normalize the category assignments among participants. Each institution also added questions that were typical inquiries for their reference desk in order to localize the scale to that particular university. At GCSU, this included questions specific to Flannery O'Connor and literary reviews of contemporary authors—as both typify examples of queries at the service point at any given time during the semester. The on-site coordinator of the study distributed the questions to reference department staff. All participants answered the questions and assigned READ Scale scores independently, recording the time taken, and resources used in answering the questions. The reference personnel then anonymously sent the recorded information to the on-site coordinator, who assigned each question a definitive score (based on how the majority of reference staff scored each question) and created an answer and category key to which the group referred during the duration of the study.

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Data Gathered

Reference statistics were recorded daily and hourly at GCSU while the reference service point was staffed, with three categories of questions (directional, reference, and technical) and three approach types (in-person, phone, and e-mail). Instant messaging service was added after the beginning of the semester and inquiries answered in that medium were placed in the e-mail category. For the study, only directional and reference category types were distinguished, so transactions that fell into the technical category were included in with reference. Data was collected for thirteen weeks between February 4 and May 4, 2007 (see table 1).

The data recorded during the study demonstrated that the majority of assistance sought came in the form of in-person transactions (see figure 2).

Aggregated data confirmed anecdotal suggestions that the reference desk was a destination for users and that the majority of questions were asked in person as opposed to on the phone or via e-mail. When further dissecting the data into hours, the busiest times of day at the desk were determined (see table 2). Approximately 46 percent of the transactions each day occurred between noon and 5 p.m., with the next busiest times between 8 a.m. and noon and 22 percent happening between 5 and 9 p.m. The rate of questions per hour fell dramatically between 9 p.m. and midnight, to 5.9 percent.

Of these transactions recorded for the study, only ninety-eight (5.9 percent) occurred after 9 p.m. Of those

Figure 1. The READ (Reference Effort Assessment Data) Scale*

Definitions and Examples of Numbers Rating

1: Answers that require the least amount of effort and no specialized knowledge, skills, or expertise. Typically, answers can be given with no consultation of resources. Length of time needed to answer these questions would be less than five minutes. *Examples:* directional inquiries, library or service hours, service point locations, rudimentary machine assistance (locating or using copiers, how to print a document or supplying paper).

2: Answers given that require more effort than the first category, but require only minimal specific knowledge skills or expertise. Answers may need nominal resource consultation. *Examples:* call number inquiries, item location, minor machine and computer equipment assistance, general library, or policy information (how to save to a disk or e-mail records, launching programs or rebooting).

3: Answers in this category require some effort and time. Consultation of ready reference resource materials is needed; minimal instruction of the user may be required. Reference knowledge and skills come into play. *Examples:* answers that require specific reference resources (encyclopedias or databases), basic instruction on searching the online catalog, direction to relevant subject databases, introduction to Web searching for a certain item, how to scan and save images, more complex technical problems (assistance with remote use).

4: In this category, answers or research requests require the consultation of multiple resources. Subject specialists may need to be consulted and more thorough instruction and assistance occurs. Reference knowledge and skills needed. Efforts can be more supportive in nature for the user, or if searching for a finite answer, difficult to find. Exchanges can be more instruction-based as staffs teach users more in-depth research skills. *Examples:* instructing users how to utilize complex search techniques for the online catalog, databases, and the Web; how to cross-reference resources and track related supporting materials; services outside of reference become utilized (ILL, Tech services, and so on), collegial consultation; assisting users in focusing or broadening searches (helping to re-define or clarify a topic).

5: More substantial effort and time spent assisting with research and finding information. On the high end of the scale, subject specialists need to be consulted. Consultation appointments with individuals might be scheduled. Efforts are cooperative in nature, between the user and librarian and or working with colleagues. Multiple resources used. Research, reference knowledge and skills needed. Dialogue between the user and librarian may take on a back and forth question dimension. *Examples:* False leads, interdisciplinary consultations/research; question evolution; expanding searches/resources beyond those locally available; graduate research; difficult outreach problems (access issues that need to be investigated).

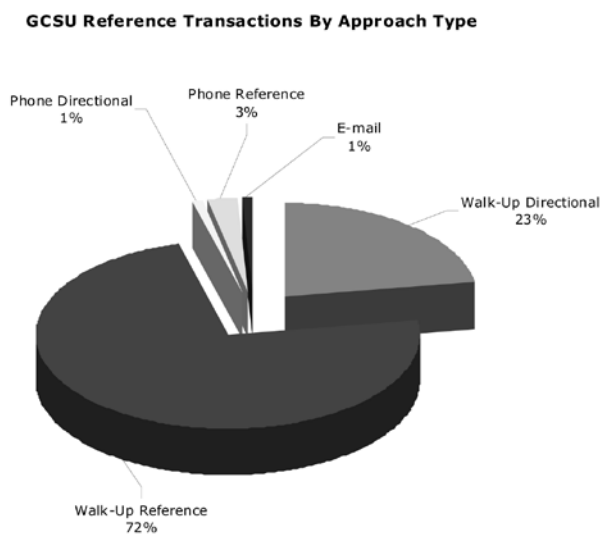
6: The most effort and time expended. Inquiries or requests for information can't be answered on the spot. At this level, staff may be providing in-depth research and services for specific needs of the clients. This category covers special library type research services. Primary (original documents) and secondary resource materials may be used. *Examples:* creating bibliographies and bibliographic education; in-depth faculty and PhD student research; relaying specific answers and supplying supporting materials for publication, exhibits, and so on; working with outside vendors; collaboration and ongoing research.

*The READ Scale © Bella Karr Gerlich

ninety-eight, there are no transactions recorded above the READ Scale category assignment of 3. Further analysis of the category assignments for each transaction demonstrates that 90 percent of the queries after 9 p.m. fell into the 1 and 2 categories (see table 3), which do not require specialized reference knowledge, skill, education, or training on the READ Scale.

Reference staff had concrete data that the librarians at the faculty or professional level were not required in the late evening. A reduction in the number of hours faculty librarians work in the evening would mean an increase in the number of hours librarians work during a normal business day and an increase in productivity as they would be able to participate in more meetings, work additional daylight reference desk shifts, and teach more instruction sessions. An additional opportunity presented itself when a reference librarian left GCSU in the fall semester following the READ Scale study period. Faced with the prospect of working additional Saturdays to fill a rotating shift left open, and needing to be available for additional reference shifts during the week to compensate for the vacancy as well, reference staff reexamined the Saturday statistics

Figure 2. Approach Types



recorded during the study to determine if this was another area where reference librarian assistance was needed or could be supplemented with staff (see table 4).

READ Scale data demonstrated that few questions were asked at the reference desk on Saturdays and that of the questions posed, most were within the 1 to 2 scoring range for effort extended. Because these types of questions seldom require the expertise of a trained reference librarian, the library's reference department amended the original proposal to include the hiring of a part-time employee to staff the reference desk on Saturdays for the spring 2008 semester. Previously, reference librarians had taken time off during the week to compensate for the time they worked on weekends. The hiring of a part-time Saturday person allowed reference librarians to spend more time in the library Monday through Friday, during which time reference questions are more numerous and more complex. Having more librarians in the library during the week also increased the pool of available employees in the library's scheduling system, eliminating gaps in the reference desk schedule created by the vacancy on staff.

Proposal to Change Staffing Patterns

In 2007 during the time of the READ Scale study, the reference desk was staffed from 8 a.m. to 11 p.m. (midnight during exams) by faculty librarians and one reference support staff position. Statistics and qualitative data gathered during the READ Scale study supported the theory that reference transactions utilizing skills, knowledge, or experience of faculty librarians are in higher demand during the day and drop off significantly in the evening. With the hiring of an additional night shift full-time equivalent (FTE) employee in the access services department who could be trained to cover the reference desk and a part-time equivalent (PTE) to work at the service point on Saturdays, the opportunities existed to shift the hours faculty librarians work from evening to day and Saturday to weekday when their knowledge and skills are in higher demand. An update of the current reference desk schedule for faculty librarians would coincide with user and Library and Instructional Technology Center needs and utilize professional skills, knowledge, and so on more effectively. The proposed faculty librarian desk schedule for evenings and Sundays was: Monday through Thursday, 5 to 9 p.m. (faculty report to work at noon), Sunday, noon to 9 p.m.

Training of Evening and Part-Time Reference Staff

The hiring of a part-time employee to cover the reference desk on Saturdays and the addition of a night-shift FTE in the access services department who could cover the desk from 9 to 11 p.m. required the establishment of a formal training process for part-time reference staff. The library's reference coordinator created a comprehensive training manual that outlined library procedures and provided information on utilizing library resources such as the catalog, journal locator, and databases. Upon completion of each section, the trainee would verify that he had completed the section and: (1) understood the information or (2) needed additional training. The READ Scale was instrumental in this training process. Trainees were given the sample reference questions that the reference librarians were given during their initial READ Scale training. They were also given the collective score for each question and instructed that any question that would be rated a 3 or above according to READ Scale criteria should be forwarded to a reference librarian.

Table 1. READ Scale Reference Statistics by Scale Category and Transaction Type

READ Scale	1	2	3	4	5	6	Totals
Walk-up directional	345	22	3	0	0	0	370
Walk-up reference	522	510	148	14	3	1	1,198
Phone directional	13	0	0	0	0	0	13
Phone reference	21	13	7	1	0	0	42
E-mail	6	6	0	0	0	0	12
Totals	907	551	158	15	3	1	1,635

Comparisons and Outcomes

Comparisons through spring 2008 show that the pattern of READ Scale categories has remained the same in the evening and Saturday hours (see tables 5 and 6).

A decline in overall statistics gathered at these time periods and higher number of category 2 assignment in the evenings, suggests two things: (1) the service, skill, and knowledge level required of the faculty reference librarian at GCSU is better served earlier in the work day; and (2) additional training and dialogue should occur with the supplemental staff to understand the higher percentage of category 2 versus 1. The READ Scale demonstrated that Saturdays and late evenings were periods during which very few transactions occurred that required specific

Table 2. Number and Percent of Questions per Hour during READ Scale Study

Hour	February 4–28	March 1—31	April 1–30	May 1–4	Total	Percent
8 to 9 a.m.	7	23	26	4	60	3.6
9 to 10 a.m.	34	29	25	4	92	5.6
10 to 11 a.m.	50	33	57	3	143	8.7
11 a.m. to 12 p.m.	47	32	36	6	121	7.4
12 to 1 p.m.	56	43	44	6	149	9.1
1 to 2 p.m.	45	38	63	8	154	9.4
2 to 3 p.m.	53	38	62	6	159	9.7
3 to 4 p.m.	72	24	60	8	164	10
4 to 5 p.m.	47	32	54	2	135	8.2
5 to 6 p.m.	51	32	39	3	125	7.6
6 to 7 p.m.	26	17	39	1	83	5
7 to 8 p.m.	20	19	32	3	74	4.5
8 to 9 p.m.	26	15	34	3	78	4.7
9 to 10 p.m.	15	19	28	5	67	4
10 to 11 p.m.	8	5	13	2	28	1.7
11 p.m. to 12 a.m.	1	0	2	0	3	0.1

Hours	Total	Percent
8 a.m. to 12 p.m.	416	25.4
12 to 5 p.m.	761	46.5
5 to 9 p.m.	360	22
9 p.m. to 12 a.m.	98	5.9

Table 3. Transactions between 9 p.m. and midnight February 4 through May 4, 2007

READ Scale Category	1	2	3	4	5	6
Totals	63	26	9	0	0	0

Table 4. Saturday Transactions between 10 a.m. and 4 p.m. February 4 through May 4, 2007

READ Scale Category	1	2	3	4	5	6
Totals	57	22	10	0	0	0

Table 5. Transactions between 9 and 11 p.m. January 6 through April 5, 2008

READ Scale Category	1	2	3	4	5	6
Totals	16	26	8	0	0	0

Table 6. Saturday Transactions between 10 a.m. and 6 p.m. January 6 through April 5, 2008*

READ Scale Category	1	2	3	4	5	6
Totals	23	21	1	0	0	0

*Saturday shifts were extended 2 hours to coincide with additional facility hours

reference knowledge, skill, experience, effort, and training. A proposal suggesting supplementing the reference desk schedule with support staff during hours of recorded low-use periods was approved and the revision of the service point schedule that refocused reference librarians' work time. All of the library's reference faculty and staff agreed that the revisions made in the reference desk schedule resulted in a more efficient use of their time and expertise. The revised hours provided a benefit not only to the reference staff but to the full-time circulation employee as well. This staff person is currently pursuing an MLIS and is now getting valuable experience at a reference desk.

Conclusion

The READ Scale was developed as a tool for capturing vital supplemental qualitative statistics when reference librarians assist users with their inquiries or research-related activities by placing an emphasis on recording the skills, knowledge, techniques, and tools utilized by the librarian during a reference transaction. The simplicity with which the READ Scale can be implemented makes it possible for any reference department to adopt the system. It can easily be used in conjunction with a department's current method of keeping reference statistics. At the GCSU library, reference personnel used a paper tally sheet for recording reference interactions. Initially, a single hash mark was used to represent a single interaction. When the library began participating in the READ Scale, the hash marks were replaced with numeric scores of 1–6 for each interaction. Since then, the library has migrated to an electronic system of recording reference transactions, but READ Scale scores are still being assigned to each interaction. For each reference transaction, reference personnel now submit the following information into an Access database: the type of question (reference, technical, or directional); the type of interaction (in person, phone, e-mail, or instant messaging); and finally the transaction's appropriate READ Scale score.

The READ Scale has proven to be a more effective tool for determining staffing patterns for the GCSU library's reference desk than merely recording reference transactions. Before adopting the READ Scale, the library kept a record of reference transactions but had no means of recording the difficulty of the questions. Now the library is able to determine when reference librarians are in most demand based not only on the volume of questions but also on the difficulty of the questions asked. GCSU applied the scale data to determine staffing protocols; however, there are other practical approaches for using the statistical data derived from the READ Scale for both strategic planning and the assessment of reference services. In addition to the value-added quality the scale brings to the reference transaction, individual institutions can also use READ Scale statistics for training and continuing education, renewed personal and professional interest, outreach, and reports to administration. Results from the spring 2007 READ Scale study and examples of how other libraries use the scale by viewing presentations at http://libraryassessment.org.