Mystery shoppers test the reference service in a public library – Reasons, Methods, Results, Effects

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Reasons: Why should we evaluate the reference service…? 

„ … in order to survive“
see: empty public libraries - less face-to-face reference questions in American research libraries

Keen competition
„… libraries are … what our patrons often turn to only after the internet has failed them.“

→ The reference service should be one of the essential reasons why people visit the library
Evaluation methods

1. Unobtrusive Reference Testing
see: Dewdney/Sheldrick, University of Western Ontario (1994): Outcome measure of user satisfaction

- 1. Rating with a questionnaire with a seven point scale
  - The extent to which the librarian was friendly or pleasant
  - How well he or she understood the question
  - The helpfulness, the answer provided
  - The extent to which the patrons felt satisfied
  - The patrons’ willingness to return to the same librarian in the future

- 2. A two-page account of their visit

- 3. Summary/lists: what were the helpful facts and non-helpful facts
Evaluation methods

2. Analysis referring to the American Library Association
„Guidelines for Behavioral Performance of Reference and Information Service Providers“

- **Approachability:**
  Example: *Does the librarian acknowledge patrons through the use of a friendly greeting to initiate conversation?*

- **Interest:**
  Example: *Do you have the feeling that the librarian takes his/her time in order to give a satisfying answer?*

- **Listening/Inquiring:**
  Example: *Does he/she ask you questions in order to specify your need?*

- **Searching:**
  Example: *Does he/she explain to you what sources he/she is using for research?*

- **Follow-up:**
  Example: *Does he/she inquire whether the answer was helpful?*

- see: [http://www.ala.org/ala/mgrps/divs/rusa/resources/guidelines/guidelinesbehavioral.cfm](http://www.ala.org/ala/mgrps/divs/rusa/resources/guidelines/guidelinesbehavioral.cfm)
Evaluation methods

Advantages of these methods?

- The patron's viewpoint: Patrons can observe and rate these issues
- The focus on the quality of the interaction as pre-condition for a satisfying outcome for the user
- The focus on all criteria which influence the quality of this interaction
- The results, which identify exactly the need of changing/improving considerably
Realisation of the evaluation

- 5 students from Stuttgart in cooperation with a German public library and 20 students from an other university

- period of the entire project: 4 months

- period of the evaluation at the reference desks: 3 weeks → a total of 78 tests

- time for each reference situation: ca. 1 hour (testing, reporting, judging)
Which results can be achieved?

Results of the rating with a questionnaire: positive rating

<table>
<thead>
<tr>
<th>Results of the information desk</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>friendlyness</td>
<td>89 %</td>
</tr>
<tr>
<td>comprehensibility</td>
<td>86 %</td>
</tr>
<tr>
<td>helpfulness</td>
<td>77 %</td>
</tr>
<tr>
<td>satisfaction</td>
<td>81 %</td>
</tr>
<tr>
<td>willingness to return</td>
<td>87 %</td>
</tr>
</tbody>
</table>
**Which results can be achieved?**

### Figures from the questionnaires (examples of asked questions)

<table>
<thead>
<tr>
<th>Process of listening/inquiring</th>
<th>positive</th>
<th>negative</th>
</tr>
</thead>
<tbody>
<tr>
<td>The librarian identifies the goals or objectives of the patron’s research, when appropriate.</td>
<td>21%</td>
<td>79%</td>
</tr>
<tr>
<td>The librarian rephrases the question or request and asks for confirmation to ensure that it is understood.</td>
<td>41%</td>
<td>59%</td>
</tr>
</tbody>
</table>

### Process of searching

<table>
<thead>
<tr>
<th></th>
<th>positive</th>
<th>negative</th>
</tr>
</thead>
<tbody>
<tr>
<td>The librarian finds out what patrons have already tried, and encourages patrons to contribute ideas.</td>
<td>13%</td>
<td>87%</td>
</tr>
<tr>
<td>The librarian explains the sources to be used.</td>
<td>45%</td>
<td>55%</td>
</tr>
<tr>
<td>The librarian explains the search strategy and sequence to the patrons.</td>
<td>38%</td>
<td>62%</td>
</tr>
<tr>
<td>The librarian asks the patrons if additional information is needed after an initial result is found.</td>
<td>40%</td>
<td>60%</td>
</tr>
</tbody>
</table>

### Follow up

<table>
<thead>
<tr>
<th></th>
<th>positive</th>
<th>negative</th>
</tr>
</thead>
<tbody>
<tr>
<td>The librarian encourages the patrons to return if they have further questions.</td>
<td>40%</td>
<td>60%</td>
</tr>
</tbody>
</table>
Which results can be achieved?

Results of the two-page accounts: quotations

- ‘The librarian was very friendly and looked me in the eye while talking. She was honestly trying to help me to get a meaningful result.’

- ‘There was no real information interview, there was no further inquiry, and the librarian didn’t ask me if I was satisfied with the information. She didn’t ask where I had already searched for and didn’t offered to return if I have further questions.’

- ‘It was annoying just sitting there and didn’t know what the librarian actually did.’

- ‘Unfortunately, the perfect finish is missing, e.g. questions about satisfaction with the information or results, and there was no encouragement that I could come again for further information.’
Which results can be achieved?

Lists with helpful and non-helpful facts from the Information Desks

Helpful facts
- Explaining the search
- Trying different ways of searching
- Offering to reserve required books
- Mentioning other possibilities, e.g. the state library
- Holding eye contact

Non-helpful facts
- Superficial search
- No search in the OPAC
- No written information
- No mention of other possibilities
- Rushed librarian
- Describing vaguely where to find the required book
Which results can be achieved?

Comparison with results of a former evaluation

→ positive rating

<table>
<thead>
<tr>
<th>Results of the information desk</th>
<th>2004</th>
<th>2009</th>
<th>increase</th>
</tr>
</thead>
<tbody>
<tr>
<td>friendliness</td>
<td>80 %</td>
<td>89 %</td>
<td>+ 9 %</td>
</tr>
<tr>
<td>comprehensibility</td>
<td>82 %</td>
<td>86 %</td>
<td>+ 4 %</td>
</tr>
<tr>
<td>helpfulness</td>
<td>75 %</td>
<td>77 %</td>
<td>+ 2 %</td>
</tr>
<tr>
<td>satisfaction</td>
<td>72 %</td>
<td>81 %</td>
<td>+ 9 %</td>
</tr>
<tr>
<td>willingness to return</td>
<td>71 %</td>
<td>87 %</td>
<td>+ 16 %</td>
</tr>
</tbody>
</table>
Which results can be achieved?

Our recommendations

- Involve the patron into the reference-process by
  - turning the monitor screen
  - handing out information material and commenting on it
  - clarifying confusing terminology and avoiding excessive jargon
  - always encouraging the patron to return if there are further questions

- Involve the patron into the searching-process
  - rephrase the question or request and ask for confirmation to ensure that it is understood
  - ask closed and/or clarifying questions to identify the goals of the patron’s research
  - explain the search strategy and sequence to the patron
  - ask the patron if his/her questions have been completely answered
Which results can be achieved?

Our recommendations

- Use all information sources that are available and not just the online catalogue

- Make the patron feel comfortable during the reference situation
  - stop all other activities when the patron approaches
  - focus and demonstrate attention on the patron’s needs by establishing initial eye contact with him/her
  - acknowledge other patrons waiting for service
How can these results be used?

- Trainings for library staff in order to improve lacks in the interaction of the reference service
- Workshops with library staff to develop quality standards
- Reorganization of reference service
- Publication of evaluation, methods and results
  - in the library
  - in professional journals
- Comparison with other results
  - of other libraries
  - of former evaluations
What did we learn?

- We could see the positive effects of quality standards, which have been developed after the evaluation in 2004.
- We learned how important (periodical) evaluations of the reference service are.
- We saw the reference service from the reader’s view, a valuable experience for our prospective work routine.
- Method skills, teamwork and project management.