

# Implementing a Reference Logger

Robin Davis • @robincamille  
Emerging Technologies & Distance Services Librarian  
at John Jay College of Criminal Justice  
METRO Reference SIG • September 16, 2013

Collecting  
reference  
interaction  
statistics

Lloyd  
Sealy  
Library

**JOHN  
JAY** COLLEGE  
OF  
CRIMINAL  
JUSTICE

# Our reference logger



## Reference log

\* Required

### Reference type \*

- Reference (quick: under 5 min.)
- Reference (medium: 5-20 min.)
- Reference consultation (20+ min.)
- Technical
- Directional

### Interaction type

- In person
- Phone
- Email (personal)

### Patron type

- Undergraduate
- Graduate student
- Faculty
- From another institution
- Other:

### Tags

- At second desk
- Not at reference desk
- ILL
- Reserves
- Referral
- CUNY+
- Printing
- Researcher access

### Notes

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## Reference log (Responses) ★

File Edit View Insert Format Data Tools Form Help Last edit was seconds ago

fx   Timestamp					
	A	B	C	D	E
1	Timestamp	Reference type	Interaction type	Tags	Patron type
2	7/3/2013 9:14:45	Directional			
3	7/3/2013 9:18:27	Directional			
4	7/3/2013 9:31:55	Reference (quick: under 5 min.)			
5	7/3/2013 9:58:45	Reference (quick: under 5 min.)	In person	Reserves	Undergraduate
6	7/3/2013 10:31:36	Reference (quick: under 5 min.)			
7	7/3/2013 10:48:42	Directional	In person		
8	7/3/2013 11:34:38	Technical	In person	ILL pickup	Faculty
9	7/3/2013 11:38:17	Technical	In person	ILL pickup/return	Faculty
10	7/3/2013 11:55:10	Directional	In person	ILL pickup	Faculty
11	7/3/2013 11:59:27	Directional			
12	7/3/2013 12:10:55	Reference (medium: 5-10 min.)	Phone		
13	7/3/2013 12:35:29	Reference (medium: 5-10 min.)			
14	7/3/2013 13:43:19	Directional	Phone		
15	7/3/2013 14:26:05	Reference (medium: 5-10 min.)	Phone		Undergraduate
16	7/3/2013 14:29:55	Directional	In person	Reserves	Undergraduate
17	7/3/2013 14:35:00	Reference (quick: under 5 min.)	In person		Undergraduate
18	7/3/2013 14:36:31	Directional	In person	Reserves followup	Undergraduate

# Who's collecting reference stats?

In a survey of New York state public & academic libraries:

- **93.6%** assess reference transactions (p. 13)

Of which:

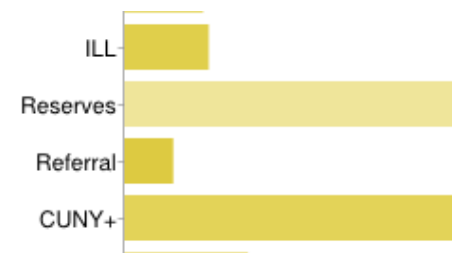
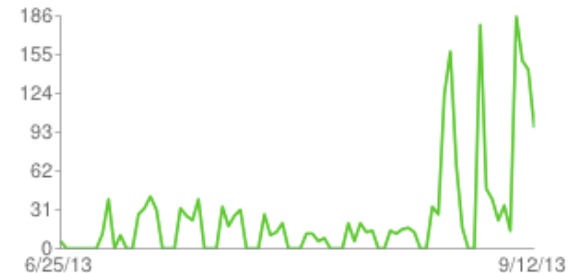
- **72.7%** record every transaction (p. 11) 😊😊😊
- **27.3%** use sampling (p. 11) 😊👉👉

Source: McLaughlin, J. (2010).

Reference Transaction Assessment: A Survey of New York State Academic and Public Libraries. *Journal Of The Library Administration & Management Section*, 6(2), 5-20.

# Uses of reference stats

- Further inform us how to staff reference desk during different hours / days / weeks
- Trends in reference: which new tutorials or info we should put online? Workshops to offer?
- In aggregate, impressive stats about our reference service to tout



# Risks of implementing a logger



**Disrupts service to students**

- **Strategy: keep it simple: 2-click minimum**



**Not getting 100% buy-in**

- **Strategy: integrate feedback; show results**



**Relying too much on bad data**

- **Strategy: design, test, implement, limit**

# Services considered

Name	Free	Customize fields	Easy setup	Well-supported	Export	Looks nice
RefTracker			?	?		
Gimlet	 \$10/mo		?			
Libstats						
Augur						
Google web form						

# Designing the logger

- June 2013: introduce logger format; ask for feedback
- July: based on suggestions, roll out pilot logger
- Mid-July: ask for more feedback on fields & format
- August: roll out final logger while library is calm
- September: ask for more feedback about use as library becomes hectic
- July 2014: revisit logger; decide on any changes in fields & format

# Feedback via wiki

## Final suggestions (August 2013: completed)

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8/12: Thanks for your suggestions! The logger is in its final form.

8/1: Thank you for diligent use of the logger! Please add any suggestions below by 8/7. The final version of the logger will be implement

- add CUNY+ tag (Tania, in conversation) -- *added 8/12*
- add printer tag? (RCD - came up several times in logs) -- *added 8/12*
- add 'student from another institution' to patron type? (RCD - came up several times in logs) -- *added 8/12*
- put the tags in popularity order - remove those that were never used in test -EB -- *done 8/12*
- Make the tracker easy to find if it gets accidentally closed ie: easy url and button on the desktop -EB -- *already there: the desktop : refdeskwiki page*

## Suggestions for beta (June 2013: completed)

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Please list your suggestions for what kinds of data to track and how! Based on everyone's feedback, we'll make a pilot tracker.

Timeline: all suggestions in by June 21; pilot tracker in place by end of June; modified, final-draft tracker in place by August 16

- Optional tags for questions to quickly characterize them, e.g. 'ILL', 'Reserves', 'On second desk', 'Followup question' —RD
- Researching how to automate text & email reference transactions —RD
- For transaction types: 'Reference (short)' and 'Reference (20+ min)' —BN
- Big boxes (?) —JD
- Add interaction type for e-mail and interaction location (e.g. office) -KC
- Enable multiple responses e.g. a reference transaction might lead to a referral, etc. - ko
- Include an option for "Writing/citation question". I'm curious to know how many writing questions we receive (I've answered a numb increase their hours or have a drop-in service, or it might suggest the need for a information common-type service model. - ko
- Not sure if we're keeping track of research consultations. There is a clip board at the desk, but maybe we could record them on thi
- This routine will still take time even through the type of questions and the answers may be in an abbreviated format. This is differer When the ref. desk is busy, especially during the free club hour when there are no classes, the stu. flood into the lib. and one is cor access forms from outside patrons and stu from other schools (CUNY and non - CUNY). One may have to backtrack and fill in ref be done each day -- correct?? Suggestion: Couldn't this be done once or twice a year? The time periods could vary so that the fla



# Demonstration: form

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## Reference log

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- Directional

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### *Interaction type*

- In person
- Phone
- Email (personal)

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### *Patron type*

- Undergraduate
- Graduate student
- Faculty
- From another institution
- Other:

[Demo form link](#)

# Demonstration: data

## Reference log (Responses) ★

File Edit View Insert Format Data Tools Form Help Last edit was seconds ago

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6	7/3/2013 10:31:36	Reference (quick: under 5 min.)					
7	7/3/2013 10:48:42	Directional	In person			Patron wanted a stapler.	10:48:00
8	7/3/2013 11:34:38	Technical	In person	ILL pickup	Faculty		
9	7/3/2013 11:38:17	Technical	In person	ILL pickup/return	Faculty		
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14	7/3/2013 13:43:19	Directional	Phone				
15	7/3/2013 14:26:05	Reference (medium: 5-10 min.)	Phone		Undergraduate	Hunter student asking about access to article	
16	7/3/2013 14:29:55	Directional	In person	Reserves	Undergraduate		
17	7/3/2013 14:35:00	Reference (quick: under 5 min.)	In person		Undergraduate	How to borrow and renew books	
18	7/3/2013 14:36:31	Directional	In person	Reserves followup	Undergraduate		

[Demo spreadsheet link](#)

# Data analysis

On the first of every month, I send out a three-page PDF of charts & graphs from the data. Primitive workflow:

1. Copy from Google results spreadsheet » Excel spreadsheet template
2. Excel formulas aggregate data & generate graphs
3. Copy graphs & numbers into Word document

## Reference Desk Logger Statistics August 1-31, 2013

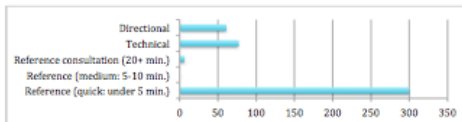
Total: 524 reference interactions logged

Total reference log use June 25 (In beta) through September 3, 2013



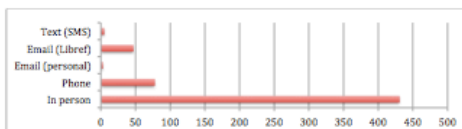
Huge spike = first week of classes!

### Question type (ref desk only)

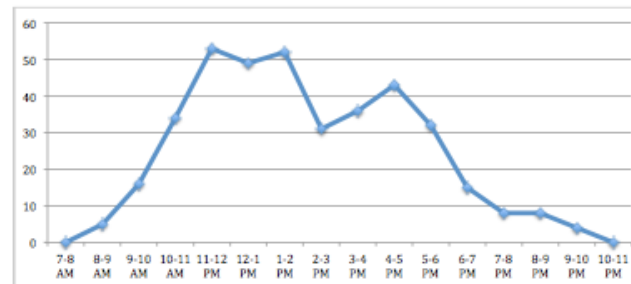


Reference (quick: under 5 min.)	300
Reference (medium: 5-10 min.)	0
Reference consultation (20+ min.)	6
Technical	77
Directional	61

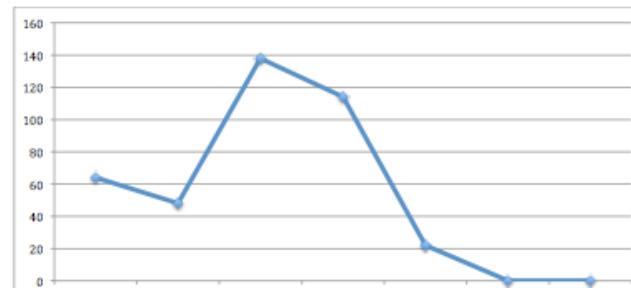
### Interaction type



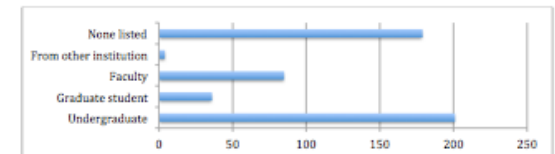
### Hour of day (ref desk only)



### Day of week (ref desk only)

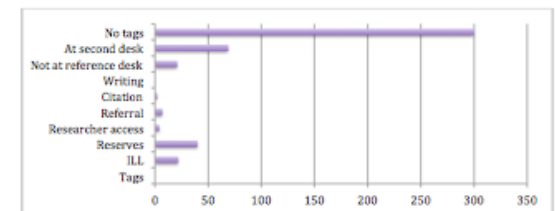


### Patron type (ref desk only)



Undergraduate	201
Graduate student	36
Faculty	85
From other institution	4
None listed	179

### Tags (ref desk only)

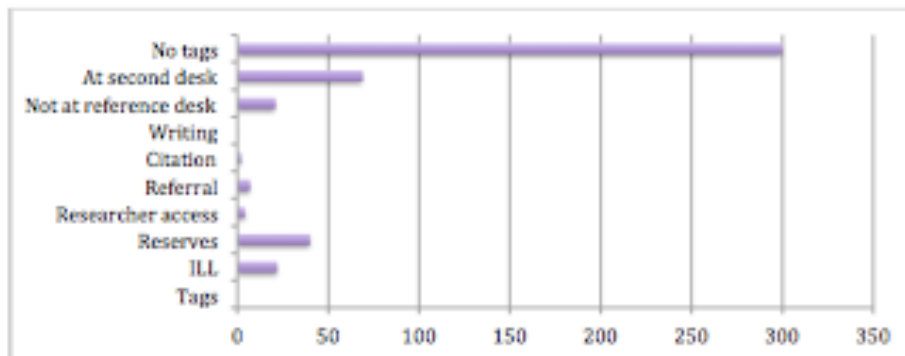


ILL	22
Reserves	40
Researcher access	4
Referral	7

# Data analysis

- **Show your results! Stakeholders need to see why they're taking the time to log each interaction.**
  - Regular summary—emailed & posted in a shared space
  - Digestible but accurate data—charts in PDF, spreadsheet in shared folder
  - Note anything particularly special—e.g.,
    - Many questions about a new system
    - Lone librarian overwhelmed 10am-11am in first half of October

Tags (ref desk only)



What data are we getting?

What data are we *not* getting?

# Next steps

- **Once we have a substantial data set, start looking more seriously for patterns**
  - Compare subsets of data
  - Correlate service changes with data points
- **Add textual summaries to monthly reports**
  - Put data into context
- **Integrate other reference service points**
  - Email & SMS—counted in total tally, but no other data logged
  - Personal email reference—decide on recommendations
  - Chat reference—once we have it

# Questions?

## Contact info:

**Robin Camille Davis**

**[@robincamille](#)**

**[robdavis@jjay.cuny.edu](mailto:robdavis@jjay.cuny.edu)**

**[robincamille.com](http://robincamille.com) • [emerging.commons.gc.cuny.edu](http://emerging.commons.gc.cuny.edu)**

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