A Look into Reference and Evaluating User Satisfaction
An Annotated Bibliography

Kayla Emerson
INFO522: Information Access & Resources
Katherine McCain, Instructor
December 8, 2010
A Look into Reference and Evaluating User Satisfaction

A Look into Reference and Evaluating User Satisfaction: An Annotated Bibliography

Introduction and Scope

This bibliography takes a look into several different types of reference services available and how users rate their experiences using these services. The type of reference services mentioned in the bibliography ranges from the traditional in-person reference interaction to that of chat and e-mail and even touches briefly on telephone reference. Additionally, several different methods of determining user satisfaction are discussed. One study in particular focuses on the unsolicited “thank you” note as a measure of satisfaction. Articles included range from 1995 to 2009 with the majority of the articles being within the last 5 years. The reasoning behind including the more recent articles is to illustrate the movement from the traditional in-person experience to the more modern use of chat and e-mail reference.

Description of User Group

There are many studies available for review that focus on the various types and levels of user satisfaction with regards to a reference experience. However, each study has its own way of determining success. Additionally, there is the difficulty that lies within users cooperating with the study by filling out the questionnaire or survey that helps the administrators understand the level of satisfaction. When all is said and done, however, most studies result in high levels of both success and satisfaction. This bibliography will cater to those looking for ways to measure user satisfaction within their own libraries as well as ways to alter the reference interaction to give higher levels of satisfaction.

Literature Review
There is a lot of information out there dealing with the evaluation of reference question transactions. It is often difficult to know where to start, when it comes to evaluating the numerous data sets. Because the different types of reference are so different, the best way to study them is to group together the information about the various groups being evaluated, namely in-person reference and the digital realm including chat or instant messaging reference and e-mail reference.

To start with, the traditional reference, or the in-person interaction, there were several indicators that satisfying the user was going to be difficult from the start. Ross and Dewdney note in their article that “Even before users got to the point of asking a question, they were forming impressions of the library as a welcoming, or not so welcoming, place” (1995). Patrons were forming instant impressions from the beginning, setting their minds for an unsuccessful reference encounter. Once the users reached the reference desk, however, the experience did not get much better. Instead of being shown how to locate the answer for themselves, being taught the methods of searching, many users were excluded. Ross and Dewdney state that “While some users reported with approval that they appreciated being included in the process of the search, others complained that they felt left out. The users in our study liked to be made part of the process, they liked to be consulted and asked for feedback on the direction of the search, and they liked to get explanations of what the staff member was doing” (1995). Tygett, Lawson and Weessies experienced something similar in their study in which they asked undergraduate marketing student to secretly evaluate the reference service. The confusion this time, however, was that the patrons could not determine who was actually a reference librarian versus a member of staff who would or could not answer the question(s) that patrons were asking of them. “The patrons are often unable to determine the qualifications of reference personnel. Students expect
to receive reference service at the reference desk and feel that anyone at the desk should be able to provide the reference service” (Tygett, Lawson, & Weessies, 1996).

Another study that looked at the in-person reference encounter was that done by Rimland and Novotny. While they did not report any issues regarding locating the reference or identifying the correct person to ask a question, they turned their focus instead on deciding how to determine whether a person was truly satisfied with their encounter or whether the user had simply had some level of success. Rimland and Novotny used surveys in their study, but they also note that “another caveat of employing user surveys is the lack of differentiation between measures of satisfaction and measures of success. While similar and closely related, satisfaction and success are, in fact, different measures. Satisfaction can be simply defined as the overall outcome of the encounter, while success contributes (usually quite largely) to that overall experience” (2007). Though no solution was offered to measure either success or satisfaction, the study had high results, that is, high levels of success/satisfaction, and the authors attributed that to the Wisconsin-Ohio Reference Evaluation Program.

With digital reference, the stakes are a little different. With the online reference, the patrons do not need to know where to locate the reference desk nor do they need to worry about asking the correct person. Once accessed online, the patron is in the right spot and they are asking the right person. Broughton notes that from a research point, with digital reference, and more specifically, with chat reference, it is much easier to track user satisfaction, because a time-stamped transcript is available for perusing (2003). There are other viewpoints with that assumption, however. Stoffel and Tucker employed the use of surveys for their study, having the survey pop up after the reference session had ended. Instead of numerous responses, however, Stoffel and Tucker noticed “a lower than expected response rate, particularly in the case of
chat reference survey, [which] makes drawing firm conclusions [about user satisfaction] from the data problematic” (2004). In Mon and Janes’ study of thank-you notes as a sign of user satisfaction, they note that “In most question-answering interactions via email, librarians send an e-mail answer to a user's question and then never hear back again from the user, leaving the librarian wondering whether the answer was satisfactory or deficient in some way” (2007).

If not receiving a response made determining the level of satisfaction difficult enough, other issues must be taken into account. Pomerantz and Luo state that patrons, when they get even a modicum of help, feel successful, having achieved at the very least a partial answer to their question while librarians are harder on themselves, declaring partial answers or unsuccessful searches as much less than satisfactory (2006). Bunge disagrees, however, and states that librarians are more likely to give themselves a higher level of satisfaction because they can acknowledge when they have done their best and even though the information may not have been found, it was not from lack of trying (1999).

The studies are showing that no matter the choice of platform for reference, there will be difficulty in achieving and determining levels of patron satisfaction. Depending on the researcher, it cannot even be determined whether digital reference is the preferred method. Naylor, Stoffel, and Van Der Laan write in their study that chat reference is optimal because it allows both the instant communication and the anonymity that being online grants (2008). Buckland, on the other hand, wonders whether or not “this digital mimicking of a non-digital technology the best answer?” (2008). Taking the discord between in-person and digital one step further, Jaggars, Jaggars, and Duffy note that in this modern world of internet information, where “Users routinely choose search engines over physical libraries or library Web sites to begin information searches,” it is astounding that there is any connection between information seeker
and information researcher, or in other words, patron and reference librarian (2009). Kwon offers an opposing viewpoint, however, instead believing that librarians can lead the way in information service, teaching the patrons how to use the new resources available to them and online reference is one of the first steps (2007).

Despite, or perhaps because of, these numerous opposing viewpoints, the studies regarding the determination of user satisfaction are themselves growing in number. With each study there are new surveys asking different questions of the users, trying to pinpoint just how successful and satisfactory their experience was. Each new study gives librarians new ways to offer improve and increase the trips to the reference desk, whether physically or virtually.

Bibliography

Entry 1:

Abstract: This paper presents the results of a use analysis and the results of a user survey of Bowling Green State University Libraries’ “Chat with a Librarian” service for the academic year 2001-2002. When appropriate, the results are compared with the results of other libraries’ services. Information examined includes when and from where users ask questions via the services, how users find out about the service, and what types of questions the users ask, the status and affiliation of the users, and user satisfaction with the service. Most of this information can be compared to findings from at least one other academic library’s study of a somewhat similar service. With a few exceptions, the findings are similar from service to service. (Excerpt from published abstract.)

Annotation: The Reference Librarian describes itself thusly: “The Reference Librarian publishes articles about all aspects of the reference process, some research-based and some applied… articles concern new electronic tools and resources, best practices in instruction and reference service, and effectiveness studies.” (http://www.tandf.co.uk/journals/titles/02763877.asp) When that combined with Kelly Broughton the result was an article that looked at user satisfaction from more than 12 different libraries combined before focusing on Broughton’s home library, the Bowling Green State University.

Search Strategy: I came across this article when beginning my searching in Dialog, starting with two of my key search points at the time, namely the desire to focus more on digital
A Look into Reference and Evaluating User Satisfaction

reference in academic libraries. Though I did find my search statement to be more than a little vague for later on in the project, I did locate this article amongst the numerous other false drops.

**Database:** Library Literature and Information Science [Dialog File 438]

**Method of Searching:** Keyword searching

**Search String:** s digital()reference and academic

**Entry 2:**

**Abstract:** The reference library plays a valuable role in a print environment for at least two purposes: direct ready reference, the seeking or verification of basic facts; and finding contextual aspects of a person, place, event, period, or other topic… Reference library service has not yet made an effective transition into the digital library environment. (Excerpt from published abstract.)

**Annotation:** What this article does is really look into what digital libraries and digital reference are, including the Internet Public Library. I selected this article in particular because it really discusses what digital reference is about, and why it still needs a lot of work in order to facilitate user’s individualistic needs. Michael Buckland is Professor Emeritus at the University of California, and has published several articles including “The digital difference in reference” in the *Journal of Library Administration.*

**Search Strategy:** I chose to continue my search by viewing articles in the esteemed *Library & Information Science Research,* searching on the more focused term “digital reference.”

**Database:** ScienceDirect Journals

**Method of Searching:** Keyword searching

**Search String:** TITLE-ABSTR-KEY(digital reference) and JOURNAL-NAME(Library & Information Science Research)

**Entry 3:**

**Abstract:** This paper discusses the strengths and weaknesses of patrons and reference librarians as sources of data for the evaluation of reference question-answering effectiveness, along with ways to enhance the usefulness of data from each source. It describes the Wisconsin-Ohio Reference Evaluation Program and discusses some illustrative statistics from the project,
including data on relationships between patron-perceived answering success and factors such as staffing patterns, effort spent on answering questions, types and sources of questions, and collection size. (Excerpt from published abstract.)

**Annotation:** This article was chosen because it analyzes both the patrons and the reference staff and how the viewing of success is clearly subjective. Charles Bunge has been active in the library sciences since he received his Master’s in the same field in 1960, including being nominated twice for the American Library Association’s presidency.

**Search Strategy:** I found this article while reading pieces on the Wisconsin-Ohio Reference Evaluation Program. The Bunge article appeared in a reference list from the article entitled “Assessing reference: using the Wisconsin-Ohio Reference Evaluation Program in an academic science library.”

**Database:** N/A

**Method of Searching:** Footnote chasing

**Search String:** Referenced in:


**Entry 4:**

**Abstract:** Using the results for participating Association of Research Libraries from the 2006 LibQUAL+® library service quality survey, we examine the service priorities of library staff (for example, whether desired scores for each survey item are above or below average) and the extent to which they are aligned with the priorities of undergraduates, graduate students, and faculty… Results indicate that substantial misalignments between library staff and users exist; library staff set a lower service priority for most LibQUAL+® Information Control items and a higher priority on almost all Affect of Service items than did users. (Excerpt from published abstract.)

**Annotation:** This article illustrated how the study was able to numerically assess the various libraries and rank the various aspects of user satisfaction (on both an individual level and the library as a whole). Damon Jaggars is the Assistant University Librarian at Columbia University, and has published a related article with Jaggars and Duffy entitled “Getting our Priorities in Order: Are Our Service Values in Line with the Communities We Serve?”
Search Strategy: I selected to do an initial search via Drexel’s Hagerty Library, specifically searching full text available articles to broaden my terminology, and so I did a basic keyword search.

Database: Project MUSE

Method of Searching: Keyword searching

Search String: “Academic Library” and reference and assessment

Entry 5:  

Abstract: The purpose of this study was to determine the effective behaviors of reference librarians during the chat reference interview, with particular emphasis given to whether the service users would feel more satisfied when librarians adopt the behaviors recommended in the revised "RUSA Guidelines for Behavioral Performance of Reference and Information Services Providers."... In six of the ten behavioral types observed, the users perceived the service as more satisfying when librarians demonstrated the behaviors suggested in the revised guidelines than when they did not. Five of these behaviors-receptive and cordial listening, searching information sources with or for the patrons, providing information sources, asking patrons whether the question was answered completely, and asking patrons to return when they need further assistance- were revealed as strong predictors of user satisfaction. These findings demonstrated that the RUSA behaviors are effective in increasing user satisfaction, suggesting that the guidelines can continue to be used as an effective tool for both staff training and service assessment in chat reference services. (Excerpt from published abstract.)

Annotation: This article was published in Reference and User Services Quarterly, the official publication for the Reference and User Services Association. Nahyun Kwon has written and co-written numerous articles dealing with reference. What made this article stand out amongst the others is that in this article, Kwon focused on the RUSA guidelines, and actually tested to see if the suggested behavior made a marked difference in the levels of user satisfaction. Kwon focused on chat reference which poses the additional challenge of not having the close physical proximity between seeker and researcher to facilitate the reference interview and interaction.

Search Strategy: With this article, I decided searching Dialog with only a couple of key points would help broaden my controlled vocabulary selection. Focusing on the topics of “reference services” (plural intended to help narrow the results list slightly) and user “satisfaction,” I was able to expand my search terms slightly, coming up with additional terms for “user” such as “customer” and “student” and found this article in the process.

Database: Library Literature and Information Science [Dialog File 438]
Method of Searching: Keyword searching

Search String: s reference()services and satisf?

Entry 6:

Abstract: This exploratory study of unsolicited thank you messages from e-mail digital reference users analyzed the information provided in these messages for user perspectives on digital reference success, outcomes, and quality elements in answers. Digital reference interactions receiving thank you messages were also compared with nonthanked interactions. Results indicated that librarians who used more words in answers were more likely to receive a thank you response from users and that many other factors, such as e-mail or Web form use or the librarians' expressing thanks to the user, did not appear to impact the thank you rate. (Excerpt from published abstract.)

Annotation: This article was selected because it goes into a rather unusual aspect of user satisfaction, which is the unsolicited “thank you” letter and how often they are received in relation to the number of reference questions answered. Lori Mon is another active member of the library sciences field, including being involved with the Internet Public Library project which brings available reference to anyone with a computer.

Search Strategy: This is an article I located in the reference list from the Pomerantz and Luo article “Motivations and uses: everything virtual reference service from the users’ perspective.”

Database: N/A

Method of Searching: Footnote chasing

Search String: Referenced in:

Entry 7:

Abstract: Despite early reports of patron enthusiasm with chat reference, usage of this service has been disappointing at some academic libraries, including our own. To probe why students have not used our chat reference service more, we conducted in-depth focus group discussions with upper level undergraduates on our campus. We questioned participants—all nonusers of
A Look into Reference and Evaluating User Satisfaction

chat reference—about their research behaviors and their reference service preferences. Responses suggest users desire both a variety of reference services and more personalized reference services. We discuss implications for how we deliver chat reference. (Excerpt from published abstract.)

Annotation: What caught my eye about this article is that it is focusing on a reference chat service that is not doing well. So many of the studies that I looked at concerning the various forms of digital reference were showing that the newer technologies, once publicized, did quite well, however, this study showed that the service never really took off as a viable reference source. As with several of my articles, this one was published in the Reference and User Services Quarterly. Naylor, Stoffel, and Van Der Laan are all among the staff at the Milner Library at Illinois State University.

Search Strategy: After having doing well with an author search for Eric Novotny, I decided to try a similar search with Bruce Stoffel having read his article “E-mail and chat reference: assessing patron satisfaction.”

Database: Library Literature and Information Science [Dialog File 438]

Method of Searching: Author searching

Search String: e au=stoffel, b?
  s e4

Entry 8:

Abstract: The questions of whether chat reference service is beneficial enough to users to justify the costs of offering it, and how valuable it is to users in fulfilling their information needs, have been primary concerns for librarians providing the service, for library administrators managing the service, and for funding agencies paying for it… This evaluation study assesses the effectiveness of chat reference service in meeting users' information needs. (Excerpt from published abstract.)

Annotation: This particular study is different from the others that I have seen in that it takes into account not only whether the user appreciated the information/service given, but also whether or not the information given was used and the reasons as to why it was used or not. Jeffrey Pomerantz is an Associate Professor with the University of North Carolina’s School of Information and Library Science, and with over 40 published articles and papers to his name, he is among the top ranking in the field.
Search Strategy: I decided I needed to focus more on the user’s reaction toward various types of reference services, whether online or in person, and decided to remain within the publication *Library & Information Science Research*.

Database: ScienceDirect Journals

Method of Searching: Keyword searching

Search String: ALL(library and reference and "user satisfaction") and JOURNAL-NAME(Library & Information Science Research)

Entry 9:

Abstract: This article discusses a service quality study conducted in the Pennsylvania State University Libraries. The Wisconsin-Ohio Reference Evaluation Program survey was selected as a valid, standardized instrument. We present our results, highlighting the impact on reference training. A second survey a year later demonstrated that focusing on behavioral aspects of reference can improve service quality ratings. (Excerpt from published abstract.)

Annotation: I selected this article for a couple of different reasons, the first of which being that it discusses the WOREP and how it made a difference in the levels of patron satisfaction. I also appreciated that this article discussed the difference between success and satisfaction and how the terms should not be used interchangeably. The article was published in *The Journal of Academic Librarianship*, a peer-reviewed journal that prides itself on putting out pieces that “[provide] a forum for authors to present research findings and, where applicable, their practical applications and significance; analyze policies, practices, issues, and trends; speculate about the future of academic librarianship” which is exactly what this article is doing. (http://www.elsevier.com/wps/find/journaldescription.cws_home/620207/description#description) Emily Rimland has published several articles dealing with reference and libraries becoming more accessible to their patrons including “Do We Do It Good Well? A Bibliographic Essay on the Evaluation of Reference Effectiveness” and “Reaching Students With Facebook: Data and Best Practices.”

Search Strategy: This article was located by doing an author search on Eric Novotny, who had written another article that I read, which was in turn located by footnote searching. I noticed that Novotny was listed in the Reference section for several of the articles that I read, so I decided to see what all he had written on the subject.

Database: Library Literature and Information Science [Dialog File 438]

Method of Searching: Author searching
A Look into Reference and Evaluating User Satisfaction

**Search String:** e au=novotny
  s e4

**Entry 10:**

**Abstract:** A study used visits by library school students to evaluate the quality of reference service in libraries. Results indicate that the librarian's behavior was the major factor in user satisfaction. Common sources of dissatisfaction are discussed. (Excerpt from published abstract.)

**Annotation:** This article is the oldest article that I selected; however, it is also one of the best that I found dealing specifically with in-person reference assessment. Ross and Dewdney did their best to illustrate that there are numerous ways that a reference transaction can be viewed as unhelpful and unsuccessful. What differentiates this article from the others is that it relates the data in personal narratives rather than a list of percentages that resulted from various user surveys. Dewdney has won several prestigious awards in regards to her articles on reference and Ross has published a “How-to” manual for reference interviews.

**Search Strategy:** Having already read the article “Using the Wisconsin-Ohio Reference Evaluation Program (WOREP) to improve training and reference services” by Emily Rimland, I looked up other works by Rimland and reviewed their reference lists as well. At the bottom of the article “Do we do it well? A bibliographic essay on the evaluation of reference effectiveness” I found the citation for this article by Catherine Ross and Patricia Dewdney.

**Database:** N/A

**Method of Searching:** Footnote chasing

**Search String:** Referenced in:

**Entry 11:**

**Abstract:** In fall 2002, Illinois State University librarians surveyed their e-mail and chat reference patrons to determine how they feel about the services and how the services might be improved. The survey also attempted to identify the extent to which the services are used in conjunction with more traditional reference venues...Approximately 400 patrons were surveyed, and a response rate of 17 percent was achieved. Results indicate a high level of satisfaction with
A Look into Reference and Evaluating User Satisfaction

electronic reference, the desirability of retaining both services despite the more immediate need of chat, and the need to cross-market reference services. (Excerpt from published abstract.)

**Annotation:** This article, published in the peer-reviewed *Reference Services Review*, was written by Bruce Stoffel, the Reference Services Coordinator at the Milner Library at Illinois State University. I selected this article because of how it approaches patron satisfaction on several different levels including response time, response quality, ease of use, knowledge of librarian, ease of locating the service on the library web site, online instructions for using the service, and the overall service. Most of the studies that I read tended to focus on only a couple of different aspects, lumping together the various parts that make up a reference experience, which can muddle the data slightly, and also makes it difficult to compare results from various studies.

**Search Strategy:** I was actually trying to locate an article from a Dialog search when I came across this piece. They both had similar wording in the title, which is why this article appeared, and upon closer inspection I found it to suit my needs wonderfully.

**Database:** Emerald Journals

**Method of Searching:** Keyword searching

**Search String:** assessing digital reference

**Entry 12:**

**Abstract:** Marketing students evaluated reference services at Central Missouri State University's library. The staff were unaware that they were being evaluated. Results of the study indicate that marketing students conduct subjective surveys well because they understand the methodology and its problems. (Excerpt from published abstract.)

**Annotation:** This article grabbed my attention because it used students that were not from the library science program as the undercover users. Using the marketing students in particular was an interesting tactic because the students were able to apply the study to their own studies into evaluating clients. This article was also published in the esteemed *RQ* before it became *Reference and User Services Quarterly*, and has the same high standards placed upon it.

**Search Strategy:** As with the article by Ross and Dewdney, I located this article when I read “Do we do it good well? A bibliographic essay on the evaluation of reference effectiveness.”

**Database:** N/A

**Method of Searching:** Footnote chasing

**Search String:** Referenced in:
Conclusion and Personal Statement

I learned so much from this project, especially when it comes to footnote chasing. That might seem like an odd statement to make, but true enough. One of the most helpful feelings I got was when I would see articles I had already chosen from some other search appear in the reference list of another article I was examining. It gave me the feeling that I was on the right track, that if these published authors had found this article significant, then it was a good sign that I had too. The footnote chasing also made the project easier as I went along, giving me keywords to try and authors to search for.

The annotations were challenging, not in knowing whether or not the publication was peer-reviewed or reliable, but looking up the authors to see why they should be trusted became problematic at some points. What I did like about writing the annotations, however, was that it made me really look at each article and decide if I really liked that article or not. I was determined that if there was an article that I felt did not deserve to be in my bibliography, I was going to replace it.

I learned that to find one good article, I had to go through five or ten more to find it. There were so many articles that looked promising from the title and abstract, but upon closer inspection went in a completely different direction that what I had thought. It became clearer why it was suggested that we find twenty or thirty articles and attempt to narrow it down from there rather than trying to find just twelve articles that could be twisted around to fit the chosen topic. I think the most important thing I can take from this project, however, is that there are so many more ways of searching than I originally thought. No single database has all the answers.
and all the articles. There are many ways to search for one article, but that does not mean you are going to find the exact article that you want without a little trial and error to start with.