LibAnswers Question Analysis and Training Plan for Research and Learning Services, Alkek Library

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An analysis of the SpringShare reference management tool, RefAnalytics, *Statistics* dataset was conducted which covered the Academic Year (AY) 2017-2018. The dataset originally consisted of over 18k questions and answers that originated from the various service desks that are part of the Research and Learning Services Division and Round Rock Library. These include: Librarian Office (Alkek & RRC), Research and Information, Periodicals-Media, Government Information, Circulation and Stacks Management. For the purposes of this project and training plan, all questions answered at the Round Rock Campus (RRC) Library were excluded from this analysis.

The analysis was conducted with the help of the administrative assistant for the Research, Instruction and Outreach Department and an intern from the Applied Sociology Program in the spring of 2019. The process for how the analysis was conducted is outlined below.

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Methodology

The team first defined the categories for review by removing identifying factors in all questions in the following manner:

- Changed patron name to "patron";
- Changed the "entered by" column to student, staff, or librarian;
- Cleaned up all BLANKS in the "entered by" column to student, staff or librarian depending on the question/answer
- Added a *semester* column and divided up the questions into semesters including interim periods.

Then the team removed all Round Rock Campus Questions by:

- Filtered out RRC questions and "cut" them from the spreadsheet
- Pasted them into a new worksheet on the same document
- Renamed the worksheet RRC
- This data can be reviewed later if desired

To make the data more manageable, the data was divided into the different "entered by" groups: student, staff, and librarian and then pasted onto separate worksheets in order to divide the questions for the analysis. Review questions were added to new columns on each of the worksheets. To accomplish the task or reviewing this large of a dataset, a formula was

used on each worksheet (Student, Staff, and Librarian) to color code every other row. This allowed us to review a sample of the questions from each group.

Instructions for Reviewers

Each group of "entered by" questions were reviewed by answering the following questions to determine if the student employee, staff member, or librarian answered, recorded and closed questions properly. Each group used different criteria in order to analyze the data and a graduated level of expectation were applied to each group as evidenced in the review criteria.

Guidelines for SMS/Text were not defined so were difficult to measure. The SpringShare system for SMS/Text has a character limit, so answers tend to be brief. Allowance for this will be considered when reviewing.

For the student questions, the reviewer answered the following questions:
Student
- Does the student record the transaction properly?
- Does the student note the referral appropriately?
- Does the student give accurate information?

For the staff member questions, the reviewer answered the following questions:
 Staff
- Does the staff member record the transaction properly?
- If unable to locate information, did staff member refer patron to their subject librarian or other department?
- Does the staff member exhibit good chat etiquette & reference service? (see checklist below)
- On a scale of 0-3 does the staff member...
  - 3-always exhibits good chat etiquette & reference service (2 errors or less)
  - 2-mostly exhibits good chat etiquette & reference service (3-4 errors)
  - 1-somewhat exhibits good chat etiquette & reference service (5-6 errors)
  - 0-does not exhibit good chat etiquette & reference service (6 or more errors)

For the librarian questions, the reviewer answered the following questions:
Librarian
- Does the librarian record the transaction properly?
- If unable to locate information, did librarian refer patron to their subject librarian or other department?

- Does the librarian exhibit good chat etiquette & reference service? (see checklist below)
- On a scale of 0-3 does the librarian...
  - 3-always exhibits good chat etiquette & reference service (2 errors or less)
  - 2-mostly exhibits good chat etiquette & reference service (3-4 errors)
  - 1-somewhat exhibits good chat etiquette & reference service (5-6 errors)
  - 0-does not exhibit good chat etiquette & reference service (6 or more errors)

Email Questions:
- Did the librarian respond to the email in a timely manner?   EG: within 72 hours or less
- Was the email written professionally using good sentence structure, punctuation, etc.?

Note: The last review question for staff and librarian is based on the following RLS Training Document: Guidelines for Chat 2019

Results

Results of Analysis of Student Group

Question: Did the Student Record the Transactions Properly?
Of the student transactions reviewed, approximately 59% of the transactions were recorded properly with around 16% recorded partially correct.

Did the Student Record the Transactions Properly?				
Type of Question	**No**	**PARTIALY**	**YES**	**Grand Total**
Information/Directional	20.41%	12.65%	51.07%	84.12%
Noise/Security	0.03%	0.00%	0.03%	0.05%
Other - Note It	0.46%	0.11%	0.27%	0.84%
Printer/Computer	0.43%	0.03%	0.65%	1.11%
Ready Ref	3.12%	2.93%	4.69%	10.75%
Refer to Dept - Note It	0.19%	0.05%	1.95%	2.20%
Refer to Subject Librarian	0.00%	0.00%	0.14%	0.14%
Research Help	0.22%	0.00%	0.57%	0.79%
(blank)	0.00%	0.00%	0.00%	0.00%
Grand Total	**24.86%**	**15.77%**	**59.38%**	**100.00%**

Question: Does the Student Note the Referral Properly?
Referrals constitute such a low number of the total questions as evidenced in the N/A column, and so review of the transactions in this case is subjective, but with a very low incorrect referral. Most of the "no" answers in this section indicate that the student only partially recorded transaction properly.

Does the Student Note the Referral Properly?					
Type of Question	**n/a**	**NO**	**YES**	**(blank)**	**Grand Total**
Information/Directional	83.39%	0.62%	0.00%	0.11%	84.12%
Noise/Security	0.05%	0.00%	0.00%	0.00%	0.05%
Other - Note It	0.84%	0.00%	0.00%	0.00%	0.84%
Printer/Computer	1.11%	0.00%	0.00%	0.00%	1.11%
Ready Ref	10.66%	0.08%	0.00%	0.00%	10.75%
Refer to Dept - Note It	2.20%	0.00%	0.00%	0.00%	2.20%
Refer to Subject Librarian	0.08%	0.00%	0.05%	0.00%	0.14%
Research Help	0.79%	0.00%	0.00%	0.00%	0.79%
Grand Total	**99.13%**	**0.71%**	**0.05%**	**0.11%**	**100.00%**

Question: Does the Student Give Accurate Information?
A review of the answers resulted in a 65% accuracy rate, which is fairly good, but a deeper look at the N/A, NO and Partially results show that it is a combination of the transactions not being recorded properly by one word answers and no notes added to the column.

Recommendations for training here should be a consistent recording of answers across all service desks along with pre-defined questions.

Does the Student Give Accurate Information?						
Type of Question	**N/A**	**No**	**PARTIALY**	**YES**	**(blank)**	**Grand Total**
Information/Directional	17.72%	6.65%	2.55%	56.91%	0.30%	84.12%
Noise/Security	0.00%	0.00%	0.00%	0.05%	0.00%	0.05%
Other - Note It	0.24%	0.24%	0.00%	0.35%	0.00%	0.84%
Printer/Computer	0.33%	0.11%	0.05%	0.62%	0.00%	1.11%
Ready Ref	4.48%	0.84%	0.65%	4.78%	0.00%	10.75%
Refer to Dept - Note It	0.14%	0.08%	0.00%	1.95%	0.03%	2.20%
Refer to Subject Librarian	0.00%	0.00%	0.00%	0.14%	0.00%	0.14%
Research Help	0.11%	0.11%	0.05%	0.52%	0.00%	0.79%
Grand Total	**23.01%**	**8.03%**	**3.31%**	**65.32%**	**0.33%**	**100.00%**

Major recurring issues in the **Student Group:**
- Students tend to leave the type of question field set on the top default and do not bother changing it when the question requires it
- If students get asked a question that isn't something that they would normally deal with, they will guess at an answer, rather than try to find out the correct answer. They even put the question mark in their answer.
- Notes field is used very rarely, and sometimes totally incorrectly.

Results of Analysis of Staff Group

Question: Does the staff member record the transaction properly?
Arguably staff record the transactions properly as evident in the Yes field scoring 84% . In the cases where they did not record the transaction or only partially recorded transactions, a review of the record shows that they left some fields blank or just put anything into the answer field. Examples of this include, Question: Where are the computers? Answer: There and There.

Does the staff member record the transaction properly?				
Type Of Question	**NO**	**PARTIALY**	**YES**	**Grand Total**
Information/Directional	7.27%	2.34%	47.91%	57.51%
Noise/Security	0.81%	0.10%	2.92%	3.83%
Other - Note It	1.46%	0.03%	0.19%	1.69%
Printer/Computer	0.81%	0.29%	13.69%	14.79%
Ready Ref	1.17%	0.97%	9.31%	11.45%
Refer to Dept - Note It	0.10%	0.16%	4.83%	5.09%
Refer to Subject Librarian	0.03%	0.03%	1.01%	1.07%
Research Help	0.10%	0.03%	4.44%	4.57%
Grand Total	**11.74%**	**3.96%**	**84.30%**	**100.00%**

Question: Does the staff member exhibit good chat etiquette/reference service?
In this section, the staff member and librarians were ranked the same because RLS staff had participated in training in January 2018 on good chat etiquette and a review of reference service guidelines. The training document shared with staff is what was used to determine the 0-3 scores.

As noted in the methodology section, the staff member was rated on the following:
- On a scale of 0-3 does the librarian...
  - 3-always exhibits good chat etiquette & reference service (2 errors or less)
  - 2-mostly exhibits good chat etiquette & reference service (3-4 errors)
  - 1-somewhat exhibits good chat etiquette & reference service (5-6 errors)
  - 0-does not exhibit good chat etiquette & reference service (6 or more errors)

Approximately 58.55% of the transactions were rated as mostly exhibits or always exhibits good chat etiquette & reference service. On the lower part of the scale, around 41.46% of the transactions show the staff member only somewhat exhibits or does not exhibit good chat etiquette & reference service. This constitutes an additional training need.

Does the staff member exhibit good chat etiquette/reference service?					
Type of Question	**0**	**1**	**2**	**3**	**Grand Total**
Information/Directional	7.40%	19.43%	30.49%	0.19%	57.51%
Noise/Security	0.84%	0.10%	2.79%	0.10%	3.83%
Other - Note It	1.39%	0.13%	0.06%	0.10%	1.69%
Printer/Computer	0.81%	1.62%	12.23%	0.13%	14.79%
Ready Ref	1.14%	5.94%	2.76%	1.62%	11.45%
Refer to Dept - Note It	0.06%	0.62%	4.09%	0.32%	5.09%
Refer to Subject Librarian	0.03%	0.32%	0.58%	0.13%	1.07%
Research Help	0.13%	1.49%	1.69%	1.27%	4.57%
Grand Total	**11.81%**	**29.65%**	**54.69%**	**3.86%**	**100.00%**

Question: If unable to locate information, did the staff member refer the question to their subject librarian or other department?
Once again, referrals are a small percentage of the total, so the .23% where the staff member did not refer, is acceptable.

If unable to locate information, did the staff member refer the question to their subject librarian or other department?				
Type of Question	**N/A**	**NO**	**YES**	**Grand Total**
Information/Directional	54.82%	0.03%	2.66%	57.51%
Noise/Security	3.57%	0.06%	0.19%	3.83%
Other - Note It	1.69%	0.00%	0.00%	1.69%
Printer/Computer	13.04%	0.00%	1.75%	14.79%
Ready Ref	9.67%	0.10%	1.69%	11.45%
Refer to Dept - Note It	0.71%	0.03%	4.35%	5.09%
Refer to Subject Librarian	0.16%	0.00%	0.91%	1.07%
Research Help	3.76%	0.00%	0.81%	4.57%
Grand Total	**87.41%**	**0.23%**	**12.36%**	**100.00%**

Major recurring issues in the **Staff Group:**

- Staff do not record the patron encounter correctly.
  - Ex: where is 250? An: Over yonder
  - Ex: where are the bathrooms? And: pointed
- This issue can be somewhat fixed with predefined questions and answers
- Another issue is formatting for different kinds of responses. [this is from the emails or chats mainly and refer to if the answer was done in the editor using links, or just pasting links into the answer box. Speaking with SpringShare would help
- Notes field is rarely used.

Results of Analysis of Librarian Group
Question: Does the librarian record the transaction properly?

Librarians should model good transaction recording behavior, but the analysis shows they rate middle of the three groups. Addressing the issue of partially completing fields or completely leaving transactions blank is a training recommendation. Review of the data also shows that when an email question is "reopened" by the patron replying "thank-you" it can be incorrectly closed again if the librarian does not change the response to "do not add to RefAnalytics." By nature, the first response is to close the ticket again, but if that change is made, the transaction gets entered, but full of blank answer fields.

Does the librarian record the transaction properly?				
Type of Question	**NO**	**PARTIALY**	**YES**	**Grand Total**
Information/Directional	2.29%	4.50%	18.08%	24.87%
Noise/Security	0.08%	0.34%	2.12%	2.55%
Other - Note It	0.00%	0.08%	1.53%	1.61%
Printer/Computer	0.08%	0.17%	1.78%	2.04%
Ready Ref	1.61%	8.67%	26.17%	36.45%
Refer to Dept - Note It	0.17%	0.00%	2.38%	2.55%
Refer to Subject Librarian	0.00%	0.25%	0.76%	1.02%
Research Help	2.38%	3.40%	23.11%	28.89%
Grand Total	**6.63%**	**17.42%**	**75.96%**	**100.00%**

Question: Does the Librarian Exhibit Good Chat Etiquette/Reference Service?

Librarians are professional staff and should be conducting research assistance in a manner that exceeds expectations. For this question, a ranking system was devised based on the number of errors the reviewer felt was made on the transaction. As noted in the methodology section, the librarian was rated on the following:

- On a scale of 0-3 does the librarian…
  - 3-always exhibits good chat etiquette & reference service (2 errors or less)
  - 2-mostly exhibits good chat etiquette & reference service (3-4 errors)
  - 1-somewhat exhibits good chat etiquette & reference service (5-6 errors)
  - 0-does not exhibit good chat etiquette & reference service (6 or more errors)

Approximately 60% of the transactions were rated as mostly exhibits or always exhibits good chat etiquette & reference service. On the lower part of the scale, around 31.86% of the transactions show the librarian somewhat or does not exhibit good chat etiquette & reference service. This constitutes an additional training need.

Further analysis of the N/A and Blank columns is needed as well. This may be a result of the reviewer and may change the rankings somewhat.

Does the Librarian Exhibit Good Chat Etiquette/Reference Service?							
Type of Question	**0**	**1**	**2**	**3**	**N/A**	**(blank)**	**Grand Total**
Information/Directional	3.65%	2.38%	8.41%	4.67%	1.53%	3.99%	24.63%
Noise/Security	0.34%	0.08%	1.70%	0.08%	0.34%	0.00%	2.55%
Other - Note It	0.25%	0.17%	0.51%	0.42%	0.25%	0.00%	1.61%
Printer/Computer	0.34%	0.00%	1.02%	0.68%	0.00%	0.00%	2.04%
Ready Ref	7.31%	9.94%	9.01%	10.03%	0.42%	0.00%	36.70%
Refer to Dept - Note It	0.00%	0.08%	1.19%	0.51%	0.76%	0.00%	2.55%
Refer to Subject Librarian	0.00%	0.08%	0.17%	0.68%	0.08%	0.00%	1.02%
Research Help	2.97%	4.25%	7.82%	13.17%	0.59%	0.08%	28.89%
Grand Total	**14.87%**	**16.99%**	**29.82%**	**30.25%**	**3.99%**	**4.08%**	**100.00%**

Question: If unable to locate information, did the librarian refer the question to their subject librarian or other department?
Analysis on this category is like the other groups. However, librarians may have a clearer understanding of the referral model, and so explains the slightly higher Yes total on this question.

If unable to locate information, did the librarian refer the question to their subject librarian or other department?					
Type of Question	**N/A**	**NO**	**YES**	**(blank)**	**Grand Total**
Information/Directional	11.86%	0.85%	11.44%	0.17%	24.32%
Noise/Security	1.28%	0.09%	1.20%	0.00%	2.56%
Other - Note It	1.11%	0.00%	0.51%	0.00%	1.62%
Printer/Computer	0.86%	0.09%	1.11%	0.00%	2.06%
Ready Ref	23.79%	3.84%	5.64%	3.42%	36.68%
Refer to Dept - Note It	1.29%	0.09%	1.20%	0.09%	2.66%
Refer to Subject Librarian	0.17%	0.00%	0.85%	0.00%	1.02%
Research Help	18.20%	2.65%	7.60%	0.60%	29.05%
Grand Total	**58.61%**	**7.60%**	**29.55%**	**4.36%**	**100.00%**

Major recurring issues in the Librarian Group:

- Librarians are not quite as bad as the students on leaving the type of question field on the default setting, but they do not use it for its purpose enough. This may be explained by the fact that Librarians do not use RefAnalytics as often as the students or staff at service desks.
- On the Librarian's tab under emails, it is unclear if there is an option to add an email string from a previous email. It appears the a few of the emails being ranked as low on

etiquette and punctuation may be from a previous emails that were not included in the Q/A fields as one transaction. This is the reason why a deeper look at this is needed.

- In the Librarians section, there really is no way to review the ones that happen in person like we did on the student's tab, these are few and far between but just a note that they will have N/A on most fields

A final result of the analysis for all groups shows that the majority of transactions are recorded properly and accurate information is given to our patrons. There are still training needs that can be addressed to improve the overall ranking of the Ask a Librarian Service and those recommendation are discussed below. An additional review of chat transcripts is also recommended to further assess the service provided by our librarians and staff.

The Round Rock campus was not a part of this review, but could incorporate the same methods in order to assess the Ask a Librarian Service and their service desk staff in Round Rock.

Recommendations for Training

As a result of the review, the team recommends predefined questions be added to the RefAnalytics System. Adding the predefined questions will help some with the inconsistency of recurring questions. A downside to adding a predefined question is the Springshare system doesn't allow for us to add the predefined answer, so there will still be inconsistencies in the answers.

Predefined Questions that could be added
- Where is Alkek 250?
- Where are the Bathrooms?
- How do I print?
- How does Send and print work?
- What are the library hours – especially when the library is on special hours
- Where is Lost and found
- Where is the hole punch/ stapler?
- Where is a scanner?
- Do you have, tape/ scissors / paper clips / markers / highlighters ect.
- Where do I check out a calculator/ laptop?
- How to pay a fine/get a fine removed
- How to place a hold on a book
- How to recall a book that is checked out
- How to check out a book/ item on reserve
- There is a library hold on my account what do I do?
- How do I reserve a study room?
- How do I get a graduate locker?

Training Recommendations for Student

As a result of the review, the training recommendations are:

- When using RefAnalytics, make sure students change the fields for each type of question answered and do not leave it set to default on the last answer.
- If students get asked a question they cannot answer, ensure they know where to find the correct answers.
  - This is covered in the Student Worker Training Manual
  - Student Worker Training
- Students should make use of the Notes field as appropriate as per Unit

Training Recommendations for Staff

As a result of the review, the training recommendations are:

- Staff should record all transactions correctly. Utilize the pre-defined questions or FAQs as appropriate. Examples of the following recurring questions answered appropriately.
  - Ex: where is 250? An: Just across the breezeway
  - Ex: where are the bathrooms? An: On this floor, they are down past the public elevators.
- Make use of predefined questions
- Training on proper use of the Editor
- Staff should use the Notes field appropriately
- Follow appropriate Chat/Email Etiquette Guidelines

Training Recommendations for Librarian

As a result of the review, the training recommendations are:

- Fill in all the fields appropriately for each question: Chat, Email or RefAnalytics
- Utilize the "Do Not Add to Analytics" option for recurring emails if it is just a "thank you" or similar type of response. If the patron sends a new question, the record the statistic appropriately
- If using RefAnalytics, and a note is appropriate, then add it.
- Follow appropriate Chat/Email Etiquette Guidelines

Final Thoughts About the Project

As a result of using Office 365 with three reviewers created many issues with data not saving, the excel spreadsheet crashing and other issues. As a result, the final review wasn't completed until early May 2019 after starting over and re-creating the spreadsheets. One reviewer at a time working on the spreadsheet was how we finally got through the review of the

transactions. By the time the review was complete, I had to put the final report and training plan on hold until after I completed staff performance appraisals.

Overall, I feel good that the project and report is done and that we have data that will support the training plan and should correct some of the lower results.

Another component that came as a result of this project and as part of performance reviews is that the SpringShare system only has a "Rate this Chat" function for our chat transactions. The response rate is less than 10% on many of the chat transactions and produces an unrealistic rating system. A survey will be created in LibWizard that will be come a "canned response" that will be used to send to patrons who use the Chat and Email Ask a Librarian service. If I can identify a way to survey staff who use the service desks as well, the will also be surveyed.