



Evidence Summary

Reference Desk Employees Need Both Research Knowledge and Technical Skills for Successful Reference Transactions

A Review of:

Chan, E. K. (2014). Analyzing recorded transactions to extrapolate the required knowledge, skills, and abilities of reference desk providers at an urban, academic/public library. *Journal of Library Administration*, 54(1), 23-32. doi:10.1080/01920836.2014.893113

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Abstract

Objective – To determine the essential knowledge and skills required by reference positions serving academic and public library patrons.

Design – Data analysis of recorded reference transactions using author-created categories.

Setting – The reference desk of a joint academic and public library in downtown San José, California.

Subjects – A total of 9,683 in-person and phone reference transactions recorded between August 20 and December 29, 2012.

Methods – All reference transactions recorded in the tracking software Gimlet during the fall 2012 semester were downloaded and analyzed in Excel using 17 author-created reference service categories. Of the original 13,827 transaction entries, 4,135 were eliminated because the actual reference questions, an optional entry in Gimlet, were not recorded. Thus these transactions could not be properly categorized for analysis.

Main Results – The most frequently occurred type of reference transaction (16.6%, or 1,607 out of 9,683) out of the 17 categories was assistance for printing, copying, scanning, and wireless network assistance. The next most regularly recorded categories were catalog searching for non-known items (15.0%) and general research (10.9%), which included formulating research questions and selecting the appropriate resources for searching.

When clustering the 17 reference question categories into 4 broader thematic groups, “research-oriented assistance,” including question categories for catalog searching and general research, emerged as the most common question type (31.7%). Technical and equipment assistance (30.8%) was the second most popular category group, followed by facility and policy questions (19.2%), and quick search requests (18.3%).

Conclusion – The study findings suggest that successful reference desk transactions would require library employees to master research knowledge as well as technical computer and equipment skills.

Commentary

This study uncovered a number of training considerations for reference desk employees’ professional development. Unfortunately, flaws in the study design limited the usefulness of the findings. A close examination of the research using the EBL Critical Appraisal Checklist (Glynn, 2006) indicated an overall validity (65%) below the accepted threshold of 75%.

One major validity issue concerns the author-created question categories. It is unclear whether these categories were developed based on existing literature, the researcher’s personal experience, or other sources. Moreover, the author appeared to be the only coder for categorizing all 9,683 reference questions. Such ambiguities in the coding process raise

questions about rater bias and reliability of the category assignments.

In addition, while the author should be commended for providing detailed descriptions for every question category, the broader thematic groupings of these categories would have benefited from similarly detailed explanations. For instance, the question category for circulation policies was assigned the theme of “quick searches” (group 3), instead of “policies” (group 1). Likewise, transactions for assisting patrons with downloading e-books on supported devices were grouped under “research-oriented assistance” (group 4) instead of “technical/equipment assistance” (group 2). Unfortunately, the rationale for these seemingly contradictory assignments was unavailable.

Moreover, almost 30% of all recorded transactions were eliminated because the original reference questions were unavailable. It is unclear whether reference staff failed to follow the researcher’s instructions, or proper recording instructions were not provided. In either case, omission of such a significant portion of reference transactions raises concerns about representativeness of the results. Also, as the author had noted, the types and numbers of questions sent directly to liaison librarians from academic patrons were also excluded, thus further impacting reliability of the data.

Lastly, even though the tracking software Gimlet required other metrics for each reference transaction, none of these data was used in the study. Some of the data points, such as transaction duration and question format, could have complemented the study results by demonstrating the amount of time reference staff spent addressing different types of questions. Likewise, differentiations between academic and public patron transactions could have strengthened the findings, but user type was not recorded.

Therefore, despite this study’s unique setting in a hybrid public and academic library, further

research is needed to solidify its findings. Nonetheless, this article has provided a good starting point for future research in core reference skills and training development.

References

Glynn, L. (2006). A critical appraisal tool for library and information research. *Library Hi Tech*, 24(3), 387-399. doi: 10.1108/07378830610692154