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# Using the Wisconsin–Ohio Reference Evaluation Program (WOREP) to Improve Training and Reference Services

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**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.**

## INTRODUCTION

In the late 1990's the Pattee Library at the University Park campus of Pennsylvania State University underwent a radical transformation. Along with extensive physical renovations, the library collections and services were re-distributed into newly created subject and format libraries. These "libraries within a library" were designed to focus on assigned areas. It was expected that by concentrating on specific disciplines the subject libraries would be able to provide enhanced levels of service for their users. This article discusses the use of the Wisconsin–Ohio Reference Evaluation Program (WOREP) survey instrument to collect data on reference quality at one of the newly created service desks. We focus on how the Arts and Humanities subject library modified service desk training based on the results of the WOREP study, and its impact on the delivery of reference service. A second WOREP study was conducted a year later to assess the effectiveness of the changes we made. The second study showed vast improvements in how patrons rated our reference services. As a result of these experiences the authors suggest best practices for quality service training.

The authors work in one of the newly created subject libraries, the George and Sherry Middlemas Arts and Humanities Library. The Arts and Humanities Library provides collections and services in a variety of subject areas including: area studies, classics, dance, film, history, languages, literature, music, philosophy, religious studies, theater, and the visual arts. To serve users in these intellectually diverse subject areas, the Arts and Humanities Library staffs two service desks. The *Arts and Humanities Reference Desk* is housed near the print reference works, and is adjacent to an entry point to the circulating collection of approximately one million volumes. The *Music and Media Center* (MMC) desk provides circulation services for the closed-stack collection of approximately 20,000 sound and 5000 video recordings, a course-reserve service for media, and reference service for music and media. During the study period, both service desks were staffed every hour the library was open, a total of 102 hours per week each. Staff included six faculty librarians, five full-time staff assistants, and 2.5 FTE part-time reference assistants (students). Both desks participated in the study.

From the onset it was clear that Arts and Humanities reference staff faced a daunting challenge. They were expected

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to be knowledgeable about the core print and electronic resources in a staggering range of disciplines, everything from Art and Music, to History and Asian Studies. To address this, an extensive training program was devised to ensure that staff were aware of key resources. New hires received a lengthy orientation manual which was reviewed with the Coordinators of Reference Services over many hours of individual sessions. This initial orientation was supplemented by staff training sessions conducted throughout the semester. Led by subject specialists, these sessions typically covered resources in a single discipline in depth, or reviewed course assignments expected to generate significant amounts of questions at the service desks. In spite of these elaborate (and time-intensive) efforts, there was a sense that our service offerings fell short of the ideal envisioned by the subject library model. Informal observations and conversations revealed instances of less than satisfactory service, but we lacked evidence beyond the anecdotal. Penn State participates in the LIBQual+ program used to collect data on patron impressions of service quality, but the instrument is designed to measure service in general, and does not specifically relate to reference desk transactions. Also, users are asked to respond about the library's services as a whole, making it impossible to pinpoint the performance of a specific service unit. The study discussed in this article was conducted to collect quantitative and qualitative data on patron's perceptions of reference service in the Arts and Humanities Library.

#### LITERATURE REVIEW: ASSESSMENT AND TRAINING

Evaluating reference quality has been a concern of librarians since the genesis of the profession, and literature on this topic is copious. The Reference Assessment Manual (RAM) published in 1994 by the Reference and Adult Services Division of ALA has served as a resource for librarians interested in reference evaluation methodology.<sup>1</sup> Since its publication, librarians have continued to debate and conduct research on assessing reference service quality.

One way to break down the mountain of research in this area is by looking at two main methodologies for analyzing the reference encounter—obtrusive and unobtrusive studies. Unobtrusive studies are evaluations in which reference staff are unaware that a study is taking place. Recognized unobtrusive studies were introduced in the 1960s by Crowley and Childers.<sup>2</sup> The seminal article that reported this type of study was Hernon and McClure's "Unobtrusive Reference Testing: The 55 Percent Rule," which introduced the disheartening 55 percent accuracy benchmark to the profession in 1986.<sup>3</sup> Although popular, the methodology used by many unobtrusive evaluations in the past only distinguishes between right or wrong answers and does not account for the complexities that comprise most reference questions. Because of these black and white limitations, newer studies have been developed to account for the nuances and behaviors involved in answering reference questions. For example, Joan Durrance's "Willingness to Return" study introduced new measures into unobtrusive studies by measuring the willingness of a patron to return to the same library staff member for help with another question.<sup>4</sup> Dewdney and Ross were able to use Durrance's measures to target how particular aspects of the reference transactions (such as how the interaction is terminated) affect reference success.<sup>5,6</sup> The unobtrusive evaluation has been used most recently to target particular aspects of reference transactions rather than the overall success or failure of answering a question correctly.

The most common manifestation of the obtrusive study—where participants know they are being evaluated—is the user survey. Although reputed for their valuable insights, user surveys are often plagued by response bias on the part of the user, who, rather than responding with their honest feelings, responds with answers they feel are expected of them. In addition to response bias, 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. For example, a patron may not find exactly what he or she wanted, but can still feel generally satisfied if they experienced friendly service at the library. For this reason, it is important to measure satisfaction and success separately and provide a finer level of granularity when using surveys to evaluate reference services.<sup>7</sup>

To address survey response bias, and to separate satisfaction from success, Marjorie Murfin, Gary Gugelchuk, and Charles Bunge developed a new instrument in the mid 1980s, first known as the Reference Transaction Assessment Instrument (RTAI), and known today as the Wisconsin–Ohio Reference Evaluation Program or WOREP.<sup>8</sup> After each reference transaction, the staff member and patron complete separate surveys, rating different aspects of the reference encounter. At the conclusion of the survey period, the survey pairs are reunited for processing using a unique identifier. The result is a relatively complete picture of each reference transaction furnished to the participating library. Transactions are only considered successful if the patrons indicate that they found exactly what they wanted, were fully satisfied with the transaction, and do not indicate any reasons for discontent.<sup>9</sup>

A few features of the WOREP set it apart from other user surveys. The main benefit is its decoupling of service ratings from success ratings, which provides unambiguous measurements in these areas and increases the legitimacy of the test. Another advantage is the use of standardized, expertly designed questionnaires. Due to the standardization of the WOREP survey, statistical analysis of completed WOREP surveys can be expedited at a processing center. Participating institutions are able to benchmark results with other libraries using a shared database.<sup>10</sup> These benefits have made the WOREP a popular choice for reference evaluation because libraries can easily recognize their areas of strength and target areas that need improvement. For example, Brandeis University was able to put its new tiered reference model to the test and found through a WOREP study that the amount of time spent on questions contributed to its high reference success rates.<sup>11</sup> Other studies have used the WOREP to examine how techniques from the business world can help to improve reference service.<sup>12</sup>

Although newer techniques for evaluating reference effectiveness have been introduced, there is by no means agreement as to which method is best. However, studies that reflect the true complexities of reference transactions are a welcome addition to earlier studies that only view success in black and white.

#### WOREP STUDY AT PENN STATE

In Fall 2001 the Arts and Humanities Library agreed to participate in the Music Library Association's WOREP study. Music libraries at colleges and universities are frequently

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