

Let's Never Do This Again

How a large-scale project led us to re-think chat reference assessment at University of Washington Libraries

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2015-2016 Chat Assessment Project

Process

3721 (one academic quarter) chat transcripts coded for:

- Reference Effort Assessment Data (READ) scale
- Demographic information, ebooks, selected subjects
- Examined post-chat survey comments
- Team discussion about observed themes

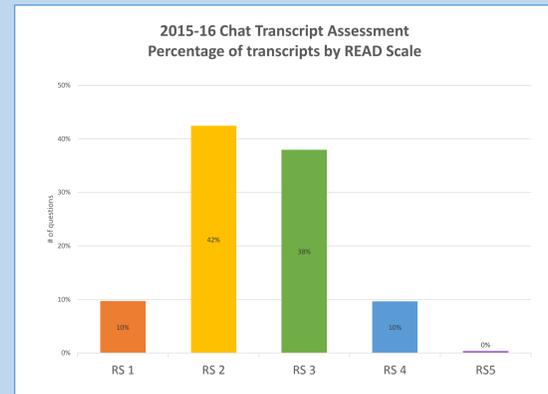
Challenges

- Demographic information hard to discern
- Unwieldy format of chat transcripts - couldn't use analysis software but coded in individual batches using Excel
- Process was lengthy – over 1 year to complete

Findings

- Patrons DO ask complex questions in chat! Concrete data helped convince skeptical library staff
- Data regarding question subjects/patron affiliation resulted in more staff participating in chat
- Chat transcripts are a rich source of patron data relevant to many library stakeholders

Following the final report, the Online Reference Services Coordinator & Director of Assessment visited various UW Libraries groups to show how chat transcripts could reveal more about patron behavior & experiences.



2017 Interlibrary Loan Questions Project

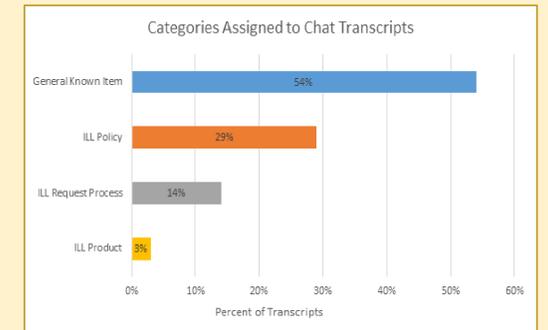
Process

157 chat transcripts posing questions about ILL services coded based on categories that emerged from the data:

- Known item that cannot be found online or physically in the library
- Questions about ILL policy (who can use it, cost) & process
- Feedback about ILL product (poor scan, delays)

Findings

- Patrons are confused about how to get items not readily available & unaware of ILL services (54% of questions coded were for known items)
- Variance in terminology between consortial borrowing and ILL options also confusing
- Using consistent language in chat for ILL borrowing may help patrons



2018 Chat Patron Interview Project

Process

128 patrons invited to participate in interviews about their recent chat reference interaction. 11 accepted; 10 were interviewed.

- Exploratory design: broad goals were to learn more about patron expectations of and satisfaction with chat service
- Mix of students & faculty/staff interviewed online over 3 week period
- Initial lack of response to invitation led us to offer a \$20 gift card as compensation
- 1 librarian working remotely coordinated interviews, in collaboration with team

Findings

- Most interviewees weren't sure what to expect when they used the service but used it to solve immediate need
- Interviewees discovered chat link on website, hadn't learned about it elsewhere
- Patrons appreciate speed and efficacy of chat reference
- Patrons either did not notice or didn't mind when they were chatting with a librarian outside of UW

Ongoing Use of Transcripts Across UW

LMS/Usability

- Following an early 2017 update of the ILS at UW Libraries, users and staff observed problems with item requests, but these were dismissed as outliers by the vendor
- Online reference staff tracked patron reports of request problems for 1 month, tagging relevant emails/chats = 32 instances
- Data and transcripts used to document that problem was pervasive, resulting in a software fix by the vendor

Ebooks/Usability

- Collection librarian used chat transcripts to illustrate the struggles patrons and librarians experience with ebooks at a presentation at the 2018 Electronic Resources & Libraries Conference. Her dramatic reading of a 58 minute chat session in which a librarian tries to help a student download an ebook led to a lively discussion of the barriers DRM presents to library users

Patron:	Hi Bruce I am trying to download all of Sharon Traveek's Beamlines and Lifetimes: The World of High Energy Physics (Harvard University Press)
Librarian 1:	Thank you...
Patron:	Is it the one in library that you're trying to access?
Librarian 1:	Yes
Patron:	http://alliance-primo.hosted.exlibgroup.com/UW/all/CP11399684001431
Patron:	I already downloaded Adobe Digital but I keep getting this message:
Patron:	Adobe Acrobat Reader could not open 3300284 (1).acrm because it is either not a supported file type or because the file has been damaged (for example, it was sent as an email attachment and wasn't correctly decoded).
Librarian 1:	http://ebookscentral.proquest.com/offcampus.lib.washington.edu/lib/washington/detail.action?docID=3300284
Patron:	Why do I keep receiving this message?
Librarian 1:	And it was the Full Download link that you hit, yes?
Patron:	Yes
Patron:	I have this same issue with other books, including Alexandra Minna Stern's Eugenics Nation Faults and Frontiers of Better Breeding in Modern America
Librarian 1:	Can you try the download from this page?
Librarian 1:	https://ebookscentral.proquest.com/offcampus.lib.washington.edu/lib/washington/detail.action?docID=3300284
Patron:	Yes I've tried downloading from the link multiple times but I keep receiving the same error message
Patron:	That error message from Adobe despite downloading Adobe Digital
Librarian 1:	I'm sorry about the inconvenience. Can you try this?
Librarian 1:	1. Open Adobe Digital Editions 2. Make the Adobe Digital Editions window only part of your screen 3. Find the .acrm file for the book (in your file manager) 4. Drag it onto the open Adobe Digital Editions window
Patron:	Ok let me try
Patron:	How do I do step #3? 3. Find the .acrm file for the book (in your file manager)

Reflections & Future Projects

- While our initial chat assessment was overly ambitious, it established that UW patrons are using the service extensively, for complex needs. Findings sparked awareness across the Libraries about how chat transcripts surface patron needs & behaviors – project was a “necessary evil”
- Transcripts continue to be used to document usability issues in our evolving discovery system
- The assessment team plans to explore focus groups next to dig deeper into patron expectations in chat

Final reports & documentation available at: <https://tinyurl.com/chatlac18>