

- 1 **Setting the Standards in Digital Reference: Defining Quality and Performance Measures**
- 2 Standards: Quality
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- 4 What are Standards
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- 6 The Role of Quality Standards
- 7 Standards Affect our Worldview
- 8 Standards Affect our Worldview
- 9 Current Digital Reference Worldview
- 10 Performance Measures

# Setting the Standards in Digital Reference: Defining Quality and Performance Measures

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# ASSESSING QUALITY IN DIGITAL REFERENCE SERVICES

Charles McClure, David Lankes, Melissa Gross,  
Beverly Choltco-Devlin

with support from OCLC and DLF

<http://quartz.syr.edu/quality>

Standards: Quality



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## OCLC and Digital Library Federation

- Multnomah County
- Library of Congress
- Maryland
- FSU
- Mid York
- Cleveland Public
- RUSA
- Liverpool (UK) John Moores University
- Syracuse University
- Baltimore County Public Library
- Pennsylvania State Library

University of Maryland ~ Mid York Library System ~ Bristol University  
Liverpool John Moores University ~ State Library of Michigan

## Participants and Study Members

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- The outcome of a political/social process to agree on aspects of a process or product a priori. The aim of a standard is to promote interoperability and the efficient functioning of a market or community

## What are Standards



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- Utilization

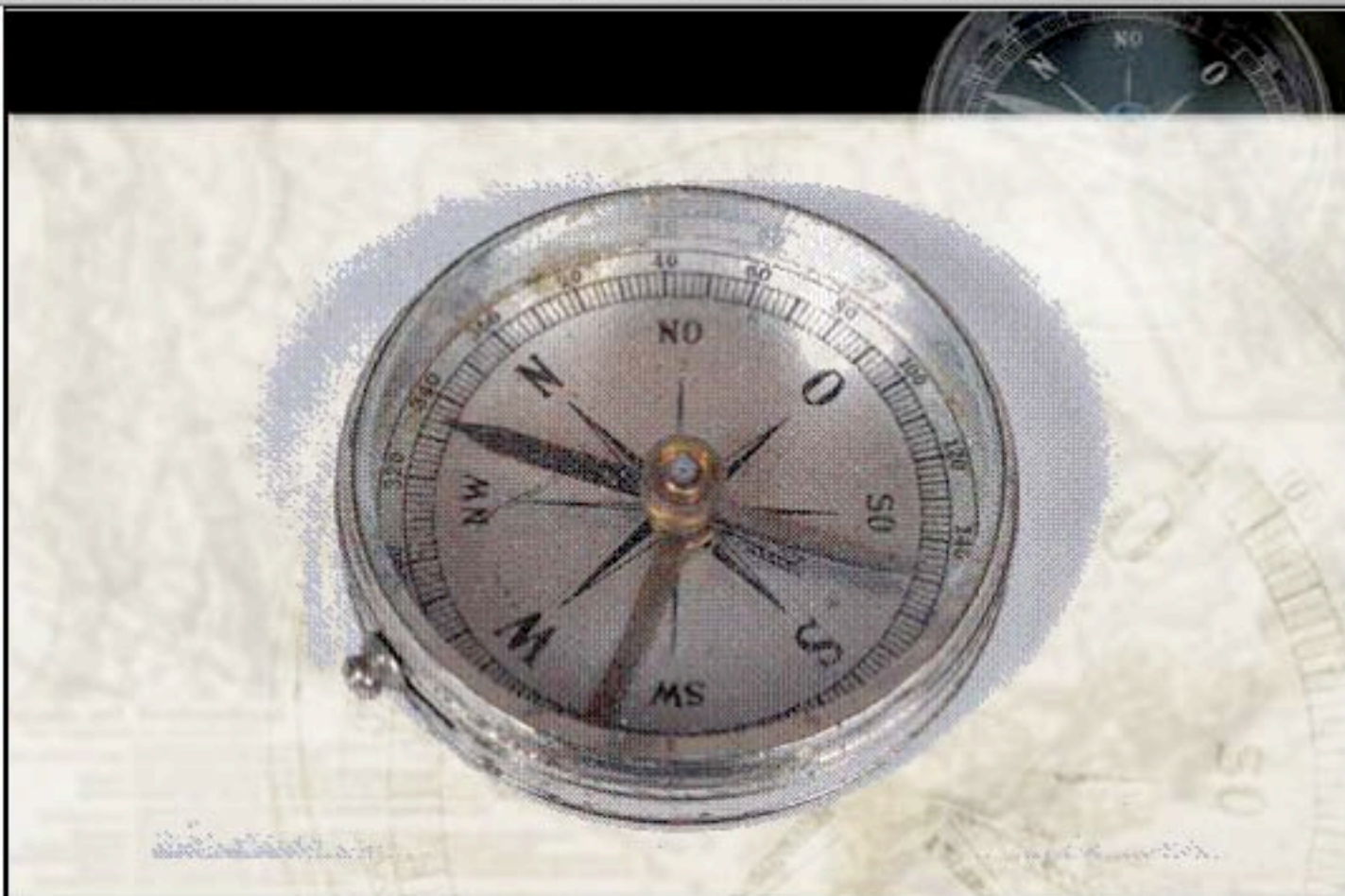
- standards that deal with the use and delivery of digital reference services, specifically to determine whether a digital reference services is succeeding. These can include a mix of qualitative and quantitative metrics as well as more abstract statements on best practice or objectives for a service.

- Technical

- hard tools (software, hardware, protocols and other standards enforced by computers with little or no interpretive room) and soft tools (primarily metadata and organizational schema) where aspects of human description are controlled, but still open to interpretation.

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## The Role of Quality Standards



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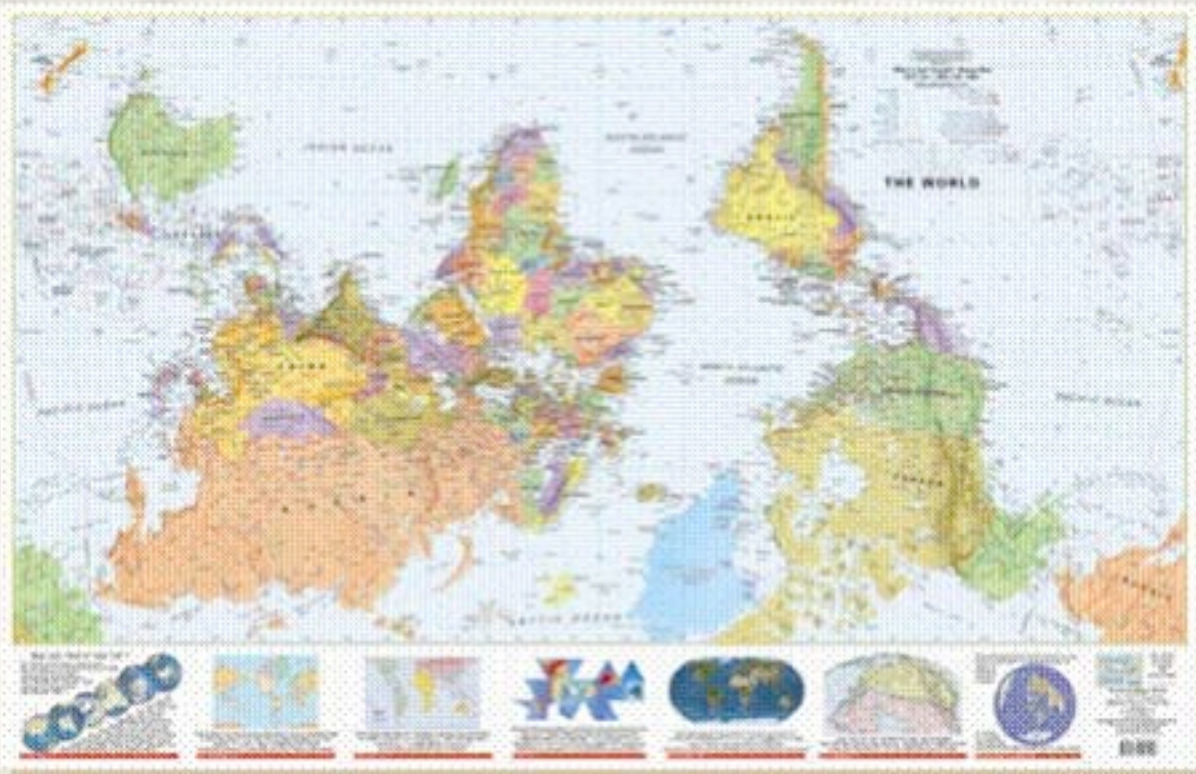
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**Standards Affect our Worldview**



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# Standards Affect our Worldview



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- Key Findings from Field Testing and Literature
  - Fear and Loathing in Library Land
  - The Only Evaluation Being Done is That Which is Required by External Funding
  - Greedy Librarian Problem
  - Where is the User?
  - Digital Reference Peer Pressure
    - Real-Time Chic

## Current Digital Reference Worldview

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- **Descriptive Statistics and Measures**
  - Statistics and Measures to determine the scale and scope of a digital reference service.
- **Log Analysis**
  - Statistics that can be derived from analysis of logs generated by web and digital reference software packages
- **User Satisfaction Measures**
  - Statistics and metrics seeking to understand the user view of a digital reference service.
- **Cost**
  - Measures that gage outlay of financial resources to run an ongoing digital reference effort.
- **Staff Time Expended**
  - Measures to determine staff time dedicated to digital reference

# Performance Measures



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- 11 Performance Measures
- 12 Quality Standards
- 13 A Unified Standards Framework
- 14 Unified Dig\_Ref Framework

- Descriptive Statistics and Measures
  - Number of digital reference questions received, Number of digital reference responses, Number of digital reference answers, Repeat Users, Digital reference correct answer fill rate
- Log Analysis
  - Number of digital reference sessions, Usage of digital reference service by day of the week, Usage of digital reference service by time of day, User's browser, User's platform
- User Satisfaction Measures
  - Awareness of Service, Reasons for use, Reasons for non use
- Cost
  - Cost of digital reference service, Cost of digital reference service as a percent of total reference budget
- Staff Time Expended
  - Percent of staff time spent overseeing technology
- Other Assessment Options
  - Peer review, Enhanced reference transaction logs, Librarian discussion groups

# Performance Measures

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- Courtesy
  - The behavior of the library or institution's staff
- Accuracy
  - The "correctness" of answers provided by a digital reference staff
- Satisfaction
  - Users determination of their success in interacting with the digital reference service
- Repeat Users
  - The percentage of users that re-use a service after first encounters
- Awareness
  - The population user group's knowledge that the service exists
- Cost
  - The cost per digital reference transaction



# Quality Standards



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- Why Link Utilization and Technical Standards?
  - More Holistic View of Process
  - Better data gathering for Assessment (and Costing)
    - Vendors Delivering Solutions that help not only interoperability, but also reporting and statistics
- Bottom Line: The More Work the Standard/Software Can Do, the Less You Have To!
- For More Detail see Lankes, McClure, Gross in Library Trends [Forthcoming]

## A Unified Standards Framework

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Utilization	Quality	Courtesy
		Accuracy
		Satisfaction
		Repeat Users
		Awareness
		Cost
	Performance Measures	Descriptive
		Log
		User
		Cost
Technical	Question Interchange Profile Knowledge base	Staff
		For more details see NISO AZ

# Unified Dig\_Ref Framework