

CSULB Library

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# Mystery Shoppers at the Library

## A Planning Report

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December 20, 2000

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## Background

Mystery shoppers have long been used in retail businesses as means of unobtrusive observation of employee behavior. They are hired to pose as anonymous customers and report their observations in writing. Usually they are provided with a list of specific observations to make. In such tests of librarians,

“predetermined test questions are administered to reference librarians...unaware that their responses are being tested. Thus, the effect of being tested should not influence...normal behavior...Those administering the test questions pose as library users and receive training in how to administer the questions to the unsuspecting librarians.”<sup>1</sup>

From the grant proposal:

“The purpose of this proposal is to develop an assessment plan for a portion of the Library’s instructional program by use of the mystery shopper of unobtrusive observation concept to measure and evaluate that program. ... The goal of this project is to develop a meaningful and ongoing method of evaluating the success of the service and instructional program of the Library as practiced at the Reference Desk..”

The questions we pondered during preparation of this training report were:

- 1) What are we trying to determine?
- 2) Where are we trying to determine it?
- 3) What questions to service points would elicit the information desired?
- 4) How and by whom will observers be trained? How will observers be recruited?

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<sup>1</sup> Whitlatch, Jo Bell. (1989). Unobtrusive studies and the quality of academic library reference services. *College and Research Libraries*, 50, 181-194.

In the 1980s, Hernon and McClure made a splash in the library world by conducting unobtrusive tests of reference service at an academic library and declaring that only 55% of the questions presented to librarians were answered correctly.<sup>2</sup> Their studies generally assumed that questions had one right answer and that the librarian alone was responsible for providing it. Bailey excoriated their methodology and conclusions as based on too little information, failure to control for observer bias, failure to allow for institutional policies, and for judging answers as either 100% right or 100% wrong. In regard to unobtrusive testing, he comments, "...There is still the problem of what to make of the results. If psychologists have trouble believing its validity and shy away from using it, then why should library researchers do differently?"<sup>3</sup>

As has been well-reported in the reference literature, we collectively succeed according to [the accuracy] measure of service quality only slightly more than one-half of the time. However, these studies do not take into account the complex librarian/patron interaction during the reference process.<sup>4</sup>

Murfin & Gugelchuk outlined the growth of unobtrusive observation as a reference evaluation tool and succinctly delineated its problems:

Unobtrusive observation...has certain limitations.... Test questions ... must be of a certain level of difficulty, must be representative, can't easily be repeated, and take considerable time and effort to formulate....This approach is generally biased toward factual questions.... Nor does it usually take into account the difficulties of garbled and incoherent questions as often presented by actual patrons....<sup>5</sup>

Durrance's unobtrusive study eschewed accuracy and instead measured the "willingness of the inquirer to return to the same staff member at a later time."<sup>6</sup> This is important because several studies have shown that students, especially lower division, are hesitant to talk to li-

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<sup>2</sup> Hernon, Peter & Charles R. McClure. (1986, April 15). Unobtrusive reference testing: The 55 percent rule. *Library Journal*, 111, 37-41; (1987a). Quality of data issues in unobtrusive testing of library reference service: recommendations and strategies. *Library and Information Science Research*, 9(2), 77-93; (1987b). *Unobtrusive testing and library reference services*. Norwood, NJ: Ablex.; (1987). Where do we go from here? A final response. *Journal of Academic Librarianship*, 13, 282-284.

<sup>3</sup> Bailey, Bill. (1987). The "55 percent rule" revisited. *Journal of Academic Librarianship*, 13, 280-282.

<sup>4</sup> American Library Association. Reference and User Service Association Division. (1996, January). *Guidelines for Behavioral Performance of Reference and Information Services*. Chicago: IL. Retrieved December 17, 2000, from the World Wide Web: [http://www.ala.org/rusa/std\\_behavior.html](http://www.ala.org/rusa/std_behavior.html)

<sup>5</sup> Murfin, Marjorie E., & Gary M. Gugelchuk. (1987). Development & testing of a reference transaction assessment instrument. *College & Research Libraries*, 48,314-338.

<sup>6</sup> Durrance, Joan. (1989, April 15). Reference success; Does the 55 percent rule tell the whole story? *Library Journal*, 114, 32.

brarians, usually for fear of being thought stupid. Leckie's is the most compelling of this body of literature.<sup>7</sup>

At San Jose State library, Whitlatch found that only 7.5% of reference questions were factual, while ten times that number required general subject guidance or instruction.<sup>8</sup> We have kept no such statistics but those figures feel right to experienced CSULB librarians. Factual questions are an exceedingly small part of academic reference work; at CSULB librarians emphasize teaching and providing guidance. Indeed, the CSULB Library Reference Manual states:

Librarians should treat reference service, both electronic and traditional, as library instruction on an individual basis. Rather than providing answers or doing a library user's work, librarians should provide guidance in finding information and instruction in research strategies.

CSULB librarians spend most of their time with students parsing out the student's needs from her/his presenting question and guiding her/him toward good information resources. The Library Information Literacy Minimum Standards (<http://www.csulb.edu/library/guide/infocomp.html>) require that the student judge accuracy of information for her- or himself:

Students will be able to analyze appropriateness of sources for specific information needs  
Understand that sources of information have different values and will be able to analyze the appropriateness of sources to their research. They will be able to differentiate fact from opinion, the scholarly from the popular.

Again from the CSULB Library Reference Manual:

The library user who comes into the Library takes priority over the person who calls on the telephone. When two or more library users are waiting in person, help should be offered first to the person who has been waiting the longest or a triage method may be used. Students, faculty, and staff who have questions that will take a considerable amount of time or are beyond the skill of the librarians on duty should be advised to sign up for an individual consultation.... When other library users are waiting, librarians should limit the time spent with one library user to five minutes.

Several factors in this officially approved policy doom CSULB reference service to being considered substandard by many researchers.

Tygett, *et al*, conducted an unobtrusive study in which student satisfaction rather than 100% accuracy was the goal. In this study, senior marketing students asked librarians pre-set questions and completed a 14-item evaluation, most of which would be useful in the CSULB reference environment. Unfortunately, Tygett, *et al*, include few details on how their unobtrusive observers were trained and even less on what will be done with the results of the study and

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<sup>7</sup> Leckie, Gloria J. (1996) Desperately seeking citations: Uncovering faculty assumptions about the undergraduate research process. *Journal of Academic Librarianship*, 22: 201-208.

<sup>8</sup> Whitlatch, p. 184.

even less on what will be done with the results of the study.<sup>9</sup> Neither do they mention the possible confounding effect of having an advanced class from only one discipline be the only observers.

Radford found that librarians' nonverbal cues were the strongest factor in students' evaluations of reference service and suggests that both male and handicapped librarians should pay especial attention to their nonverbal behavior.<sup>10</sup>

## A Barrier?

One possibly insurmountable problem at CSULB is the fact that librarians are faculty and are unionized. Assessment matters are governed by strict rules of bargaining, one of which is that faculty themselves must approve of any form of evaluation to which they are subject. One of the present researchers was Coordinator of Instructional Services from 1986-1987. In this capacity she drafted a Peer Evaluation Form whose purpose was to permit librarians to invite others to evaluate their classroom teaching by invitation only. Despite assurances of confidentiality, the consensus in 1987 was suspicion that the form would be used to punish people during the RTP process. It is feared that any assessment of reference services will meet the same fate. Librarians will rightly wonder what we are going to do with the data gathered.

Additionally, behavioral matters such as the "approachable and helpful manner" mentioned in the Reference Manual are difficult and possibly illegal to codify.

## What are we trying to determine?

We want to determine if students are well-served in their search for information according to standards appropriate to academic libraries staffed by library faculty. Development of those standards and adoption of them by the librarians will be the most challenging aspect of this project. The American Library Association's Reference and User Service Association provides extremely specific behaviors for reference librarians.<sup>11</sup> From these, we have selected (and edited) the following as appropriate and observable by a student:

1. Is ready to engage student. Is not engrossed in activities that detract from availability.
2. Establishes eye contact with student.
3. Acknowledges presence of student through smiling and/or open body language.
4. Initiates conversation with student with a courteous greeting.

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<sup>9</sup> Tygett, Mary, V. Lonnie Lawson & Kathleen Weesies. (1996). Using undergraduate marketing students in an unobtrusive reference observation. *RQ*, 36,270-276.

<sup>10</sup> Radford, Marie L. (1998). Approach or avoidance? The role of nonverbal communication in the academic library user's decision to initiate a reference encounter. *Library Trends*, 46,699-717.

<sup>11</sup> American Library Association. Reference and User Service Association Division website.

5. Acknowledges others waiting for service.
6. Generally, faces student when speaking and listening.
7. Maintains or re-establishes eye contact with student throughout the transaction.
8. Signals understanding of student's needs through verbal or non-verbal confirmation, such as nodding the head or brief comments or questions.
9. Appears unhurried during the reference transaction.
10. Focuses his/her attention on student.
11. Communicates in a receptive, cordial, and encouraging manner.
12. Allows student to state fully his/her request in his/her own words before responding.
13. Rephrases student's request and asks for confirmation to ensure that it is understood.
14. Uses open-ended questioning to encourage student to expand on the request or present additional information.
15. Uses closed and/or clarifying questions to refine the search query.
16. Uses terminology that is understandable to student.
17. Does not interject value judgments about subject matter or the nature of the question into the transaction.
18. Identifies sources appropriate to student's need that have the highest probability of containing information relevant to student's query.
19. Consults guides, databases, or colleagues when he/she cannot independently identify sources to answer the query.
20. Discusses the search strategy with student.
21. Looks for and responds to student reactions of confusion/understanding
22. Explains search sequence to student.
23. Explains how to use sources.
24. Asks student if additional information is needed after an initial result is found.
25. Asks student for acknowledgement that needs were met.
26. Encourages student to return to the reference service point.
27. If time permits, returns to student after student has had time to study the information source(s).

## Where are we trying to determine it?

As evaluation of library staff is not appropriate for CSULB library faculty, it was determined to limit the evaluation to the Reference Desk librarians.

## What questions to librarians would elicit the information desired?

One frequent real question which could serve and which fairly begs for intervention from the librarian is “Where are your journals?” Almost never does the student want a straightforward answer to this question. It is incumbent on the librarian to engage in a sometimes protracted reference interview to determine the student’s research needs and then almost always to teach (to a greater or lesser degree) the use of one or more databases. One possible appropriate dialogue is suggested in the Appendix. The beauty of this question is that it naturally occurs so often that even the writer of this proposal would be not be able to identify a mystery shopper from the question.

## How and by whom will observers be trained and recruited?

The instructor for Human Development 320 (Research Methods) is Pamela Roberts. In the past she has used library problems to teach her class unobtrusive measures. For instance, in the early 1990s, her classes logged the journals left lying about in the library. The intent of this project was to determine which journals were most used. Dr. Roberts might very well be interested in assisting with Mystery Shopping. Research Methods classes in other disciplines could also be approached.

Tracey Mayfield, Human Development Librarian, has indicated an interest in implementing this project.. This report has been discussed with her.

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## Appendix: Suggested mystery shopper question dialogue

Student should have in mind a research project for which s/he genuinely needs research. Extent to which this has been thought out is left to the student. In all cases suggested dialogue is approximate.

Q: Where are your journals?

- A:
1. Downstairs, upstairs, or any other physical location
  2. Do you have a specific citation or are you looking for articles on a particular topic?

Q. Student gives more information on topic.

- A. Librarian should ask probing questions until satisfied s/he understands student's need.  
A. Librarian should recommend particular databases or other appropriate sources.  
A. Librarians should ask about student knowledge of and/or experience with databases and other sources.

Q. Student should respond as appropriate to her/his knowledge and skill level.

- A. Librarian should demonstrate database IF student indicates desire and IF no one else is waiting for service. In either case, librarian should offer follow-up in one of several ways:
- "Come back if you get confused/need more clarification."
  - If librarian on duty is not able to answer the student's research needs fully, s/he should consult with colleague on duty and/or give student the business card of the appropriate librarian.
  - IF the Reference Center is not busy, the Librarian may follow up by asking "You doing all right?" as student works at terminal or "Did you find what you need?" as student leaves.