**Interpreting and integrating data from multiple perspectives**

**Case Study Integrating reference**

**INLS 582, Systems Analysis**

**Monday, 3/12/12**

**Assignments:**

**Reading:** B&H, Ch. 7

[Duncan, V. & Gerrard, A. (2011). All Together Now! Integrating Virtual Reference in the Academic Library](http://libproxy.lib.unc.edu/login?url=http://go.galegroup.com/ps/retrieve.do?retrieveFormat=PDF_FROM_CALLISTO&inPS=true&prodId=AONE&userGroupName=unc_main&workId=PI-0HDS-2011-SPR00-IDSI-75.JPG%7CPI-0HDS-2011-SPR00-IDSI-76.JPG%7CPI-0HDS-2011-SPR00-IDSI-77.JPG%7CPI-0HDS-2011-SPR00-IDSI-78.JPG%7CPI-0HDS-2011-SPR00-IDSI-79.JPG%7CPI-0HDS-2011-SPR00-IDSI-80.JPG%7CPI-0HDS-2011-SPR00-IDSI-81.JPG%7CPI-0HDS-2011-SPR00-IDSI-82.JPG%7CPI-0HDS-2011-SPR00-IDSI-83.JPG%7CPI-0HDS-2011-SPR00-IDSI-84.JPG%7CPI-0HDS-2011-SPR00-IDSI-85.JPG%7CPI-0HDS-2011-SPR00-IDSI-86.JPG%7CPI-0HDS-2011-SPR00-IDSI-87.JPG&docId=GALE%7CA254013609&callistoContentSet=PER&isAcrobatAvailable=false). Reference & User Services Quarterly, 50(3), 280-292.

**Slides:** interp-slides.ppt

**Duncan & Gerrard**

**Setting:** U Saskatchewan. main and branch libraries. students/faculty off-campus as well as on-campus.

**Timeline:**

2002 Start a pilot study. interest group volunteers to staff services.

2003 expand pilot to all branch libraries; annual reports regularly include recommendation to integrate services, stats on use, patron surveys

2006 task force for integration.

Definition of Virtual Reference (p. 281) "..*virtual reference* also known as *digital reference* is defined as the syncrhonous echange of information between library reference staff and patrons, using online chat software*."* Note thatthis definition, except for the technology, also applies to phone ref. <What is the difference?>

**Issues in pilot stage:**

* staffing. volunteers to serve in addition to other duties.
* no real administration, budget. seen as an add-on. only availabit if rest of library fully staffed and extra staff cycles available.
* duplication of everything: meetings, services, monitoring.
* assessment: monitoring transcrips gives more/different assessment of service possibilities.
* Fairness: "credit" for working VR
* reluctance to market potentitally "temporary" service <therefore, poor data on attractiveness, potential use of system.>
* Stats indicate limited # ref q's come in that way, but growing.

Recommendation for integration of services instigated real consideration of what reference service is/should be. <**information gathering phase**>

* what is reference services?
* who are users and what are their needs?
* what are experiences of VR users?
* review of history and values.

Values: equity of access and service, therefore overcoming barriers (distance, mobility, etc.)

If not as good as f2f, better than nothing

Matierials: print, online transition

Distance learning opportunities.

Who are the patrons? Survey of VR patrons: 30% had never used standard library services, which suggests VR reaches new population of users.

Feedback from VR survey: thematic analysis (p. 286)

* Clarifying, helpfulness, time-saving, cool factor, accessibility, technical concerns, responsiveness, suggestions.
* <look at dislike of not getting an immediate answer, and not being told they'd have to wait. should they hav been surprised? Do VR patrons have different expectations of availability of staff, time to wait, than f2f? why or why not?>

<Can you see similar pattern in other kinds of f2f and virtual help? other pattern for other kinds of services, e.g., banking, e-government?>

Big questions raised along the way:

* what is reference?
* How should it be delivered?
* Who should provide it?

**Preparing for integration**: staff concerns, questions, topics.

* small # VR q's compared to f2f <but why, and would that change if service was more robust?>
* what peer institutions are doing
* efficiency compared to phone/email reference
* patron preferences
* skills needed for VR, given type of questions received. generalist questions and in-depth questions, esp. needing subject specialist.

**Recommended changes:**

2-tier staff/service <note integration of the 2> (p. 289)

Tier 1: helping patrons with general, directional questions, instructional activities. Could be delivered (with additional training) by assistants

Tier 2: subject-specialist reference/research questions. by appointment with librarians.

Goals: <triage: let assistants handle the frequent, basic questions; save expert time for expert-level questions>. Making best use of skills, staff time.

Needed formal training for assistants, additions of hiring requirements. <implications for job classification, pay>

When does VR operate? whenever reference desk is open <why not more hours?>

**Lessons learned**

* core values, communication of them.
* integration, definitions of service
* need for a champion, clear expectations/policies, buy-in by staff.

**Risks**

* financial - what happens when budget, staff cut?
* small number of useres  foreseeing the future of growth

**Interpretation and Integration <see slides>**

In Ch. 7, B&H discuss what you do with all the information you’ve gathered from an interview, observation, or other information gathering activity. The goal of the session is to have the team do a quick preliminary processing of the information, changing from words, things, etc. of the interview into the various models. The models produced by the end of the session are rough models that you may want to neaten up for further work.

It is crucial that this is a team activity. This allows everyone to share the information at once, to ask questions, to clarify points, to build a shared perspective, all while the information is fresh. The more times someone repeats “what went on”, the more summarized it tends to be.

**Roles**

The **interviewer** reports in detail what happened in the interview. He can go through an audio tape or video tape if available. As artifacts are mentioned, they are produced and annotated.

The **work modelers** draw the various models as the interviewer talks. This requires the ability to split your attention, and also requires some familiarity with the models. B&H suggest having one person do flow and culture, and another do sequences. The artifacts are annotated as the discussion proceeds.

The **recorder** keeps notes of the meeting. Observations, who said or found what, crucial questions or issues that come up are all recorded.

**Participants** question the interviewer, check the models, come up with the things the recorder notes, and are generally very active.

The **moderator** keeps the meeting on track. This person must be able to recognize when discussions are not just “debriefing” the interviewer. For example, a participant may mention an idea or problem that he or she noticed. The participant may mention it for the recorder, but it is the moderator’s job to be sure that people don’t start talking about the idea there and then.

B&H also mention the **rat hole watcher**, which may be given to everyone. This is another monitor to be sure that the meeting stays on track.

Your impression should be of a very active, lively meeting. The result of the model is a series of models, a list of further ideas, questions, etc., and a general shared understanding of what was just learned. B&H like the idea of having a room reserved for these meetings where all the notes and models can be displayed and kept up. They are then readily available for later reference.

**Overall procedure**

Interpret: Start by going over each interview as a team, as soon after the interview as possible. During this session, start developing the set of models that seem to capture important information from the interview. To **summarize** the session, identify the insights into the information situation and work that you obtain from this interview, and review the models for that interview.

As you start collecting interviews, insights, and models, you need to start **integrating** them across interviews. You are integrating different versions of the models and perspectives on work, as viewed through your different models and insights.

How do you resolve contradictions or reconcile differences?

Does one person have a more involved view? More experience? Get to handle harder situations? Was one person more expressive? Can you identify “normal” and “exceptional” situations?

Your goal is to create a single integrated version of each model that captures the current state as best you can.

You can start integrating different versions of some tasks (e.g., done by different people, or done under different circumstances.

What is the same?

What is different – major variations, contradictions, exceptions (may need follow-up to clarify)

Result of interpretation and integration:

* What do we know? (capture in models)
* What ideas does this give us for design? (capture in draft models, proposal drafts)
* What more do we need to find out? (and how do we do it?)
* Action items (further investigations, model current and proposed systems)