

**Research Study to
Analyze Changing User
Behaviour and
Expectation of Reference
Services: Revised Final
Report**

For Hamilton Public Library

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Executive summary

Public libraries throughout the world are observing that since the advent of the internet members of the public are able to satisfy more of their information needs themselves. This is being achieved both by using general Google-indexed internet resources as well as more specialized online resources such as Inform Hamilton and the E-Resources now provided through Knowledge Ontario and the Ontario Library Service. This is leading to a global change in the nature and types of interactions that take place at the traditional reference service point in every library.

In order to better understand how to serve the public in this time of dynamic change, Hamilton Public Library hired library consultants with experience both in Reference Service and with the Social Web to observe and report on both the types of users who require Reference assistance, the types of questions they ask and the types of resources that best met the users' needs.

This project was focussed on the public users of the HPL system and consisted of observing, describing, summarizing and reporting on the current nature of use of Reference Services at HPL Central branch and 3 selected community branches.

This project was not intended to include analysis of either the quality of staffing or the quality of service given by staff nor was it meant to speculate on or recommend any changes to the current configuration or staffing of Reference Service at HPL.

This study was intended to study interactions with the public only in person or over the telephone, and did not include questions that are being handled at circulation desk or by email (either *AskOntario* or *AskHPL*).

Finally the consultants (we) feel it is important to note that this study has proven, to us at least, the value of third party observation. After spending over 125 hours of observing, we have become convinced of the value of having separate observers to record and describe the transactions. The random nature of human interactions results in an uneven distribution of questions. Rather than being spaced out evenly for easy recording and classification, interactions tend to be 'clumped'. During peak busy periods, staff has no time to record observations and when quiet times return, it's impossible to recall each interaction with any precision. As well, limiting observers to one or two meant a greater degree of uniformity when classifying questions – often a somewhat subjective task. Making a decision as to whether a question was Ready Reference, In-Depth Reference, or Reader's Advisory, for example, needed to be done quickly and as consistently as possible. See definitions of these and other terms in the Appendix to this report.

1. Environmental scan

Public libraries throughout the world are observing that since the advent of the internet members of the public are able to satisfy more of their information needs themselves. This is being achieved both by using general Google-indexed internet resources as well as more specialized online resources such as Inform Hamilton and the E-Resources now provided through Knowledge Ontario and the Ontario Library Service. This is leading to a global change in the nature and types of interactions that take place at the traditional reference service point in every library

We searched the WilsonWeb database of library literature and the Gale Academic Onefile database looking for articles relating to the evolution and future of reference and information services in libraries. We also used Google, looking for recent discussion on the topic on the internet. Only a small number of relevant articles seem to appear in the literature or on the web within the past five years that either make observations about, or speculate on, the rapid evolution of reference service in libraries, especially public libraries.

In 2010 the ALA Office for Information Technology published *Checking Out the Future: Perspectives from the Library Community on Information Technology and 21st-Century Libraries*. This report and the rest in the series, provide some valuable insights that HPL may wish to explore. The author describes it as, “a summary of the literature devoted to the future state of public, academic, school, and other libraries in the face of this revolution. It tells the story of technology changing the fundamental forms of information; of these new forms changing the way people find, access, and use information; and of the changes in core library missions and services that will result from these new behaviours.” The author goes on to clarify that, “It should be noted that this policy brief focuses on topics highlighted in the literature, and so reflects the views of the library community as articulated therein. Therefore, some important topics on which there is a paucity of publications may not be addressed.” The author also appears to have had the same difficulty in locating articles in the literature or on the web resulting in the section devoted to future reference and information service being relatively light.

OCLC, in its *Perceptions of Libraries, 2010 Context and Community: A Report to the OCLC Membership, (January 2011)*, notes that, “One of the most significant changes noted from the 2005 study was the marked increase in the use of online reference, or “ask-an-expert” services. Ask-an-expert sites usage has nearly tripled since 2005. Today, 43% of information consumers report using an ask-an-expert site, up from just 15% in 2005.”

The report also notes that young adults showed the largest growth in demand, with use up 350%. Today, 40% of teens are monthly users of online “ask-an expert” services. Respondents indicated that they used online librarian question sites “as needed,” but the popularity of ask-a-librarian sites has not seen the same spike in use as ask-an-expert sites. In fact, ask-a librarian sites have increased only slightly since 2005 (5% to 7%) and remain relatively unused or undiscovered.”

Furthermore, research activity of the kind that traditionally required librarian assistance is also down. The report notes that, “Fewer Americans report conducting research activities at the library compared to five years ago. While over a third of Americans continue to conduct research at the library at least

once a year, use of library research services has declined. Use of reference books is down 21% from 2005, now at 38%. Fewer Americans are asking for assistance with research at the library; 28% of users ask for help annually compared to 39% annually in 2005, a decrease of 28%.” (pp. 18-22)

And it seems that, “self-sufficient information consumers still appreciate expertise and a passion for learning—but they like it best on their time, with their tools. “It’s cool to ask an expert—online. It was not cool to ask a librarian for help in 1950 (Public Library Inquiry, 1950); it’s still not cool.” (p. 51)

2. Definition of project and scope from original proposal, January, 2011

This project is one of a number being done in Canada including Mississauga and Edmonton Public Libraries. This study was focussed on the public users of the HPL system and consisted of observing, describing, summarizing and reporting on the current nature of use of Reference Services at HPL Central Branch and 3 selected community branches.

It included neither the observation of nor analysis of either the quality of staffing or the quality of service given by staff nor was it meant to speculate on or recommend any changes to the current configuration or staffing of Reference Service at HPL.

This study was intended to capture a snap shot of current reference services that the customers of HPL need in person or over the telephone, and did not include circulation desk questions or email (from either *AskOntario* or *AskHPL*).

This study complied with the **Municipal Freedom of Information and Protection of Privacy Act** of the Province of Ontario. We only recorded data that was appropriate to the project process as defined by Hamilton Public Library (HPL) and protected the confidentiality of all personal information at all times. This report will enable the Management of Hamilton Public Library to better understand: the demands placed on the system, the demographics of who uses reference service and the types of questions these customers are asking. This will complement the tracking Hamilton Public Library does for on-line transactions.

3. Definition of classic, ‘traditional’ reference work

For purposes of clarity, we worked with a conceptual understanding of reference and research work similar to the following definitions as well as our own experience in public libraries.

The library profession has perceived a gradual evolution in what we understand by Reference Service over the past 100 years and more. At any given moment, every type of library works with a definition of what it understands “Reference and Research” to be. Here are some definitions used by large North American agencies.

NASA offers a clear definition for the library at their headquarters.

“The Library provides basic reference services for all library users. Reference services include information about the library and its resources, quick answers to factual questions, citation verification

and directional assistance. Services are provided in person or by telephone. The Library also provides research services... Research services include detailed and extensive searching for information, analysis of information sources, and instruction in the use of research tools. Research services may include database searching for specialized information and obtaining materials from other libraries through the interlibrary loan process”.

NASA divides reference transactions into the 3 categories that are typical in most types of libraries:

Directional—Answers to "where" questions. These include, "Where is the card catalogue? Where is the cafeteria? Where is the copier? Where do I pick up free posters? etc." Directional requests are tracked on tally sheets at the reference desk.

Ready Reference—Questions requiring minimal search time or use of Ready Reference collection or Library form letters or FAQs. Typically these types of questions can be answered in less than 10 minutes, though some may require up to 15 minutes. Some examples include request for definitions, article inquiries, and inquiries about Library holdings.

Research—Questions requiring extensive time and/or resources. Typically these require more than 15 minutes of time or use of several resources. Complicated requests, comprehensive searches, and requests requiring the use of databases billed on a “by query” or “by time” basis should be handled by the professional staff” [italics added]

The **Reference and User Services Association** is a division of the **American Library Association**. It has a further division called, the **Reference Services Section (RSS)**, “for librarians and support staff involved with frontline reference, and for those providing library services to special populations of users.”

At the ALA Midwinter, 2008, RSS sponsored a session called, “*Marketing and Public Relations for Reference Services As the Definition of Reference Changes—How Do We Market It?*”

Along with raising many useful questions about the future of reference service they provide a useful background of “*Transforming Definitions of Reference*” which demonstrates the evolution of reference service by the broad library community over the past 150 years.

This is the current definition of Reference by the Reference and User Services Association as approved by the RUSA Board of Directors, January, 2008.

Reference Transactions are information consultations in which library staff recommend, interpret, evaluate, and/or use information resources to help others to meet particular information needs. *Reference transactions do not include formal instruction or exchanges that provide assistance with locations, schedules, equipment, supplies, or policy statements. [italics added]*

Reference Work includes reference transactions and other activities that involve the creation, management, and assessment of information or research resources, tools, and services.

Creation and management of information resources includes the development and maintenance of research collections, research guides, catalogues, databases, web sites, search engines, etc., that patrons can use independently, in-house or remotely, to satisfy their information needs.

Assessment activities include the measurement and evaluation of reference work, resources, and services.

The Association of Research Libraries (ARL) defines Reference Service as:

An information contact that involves the knowledge, use, recommendations, interpretation, or instruction in the use of one or more information sources by a member of the library staff. The term includes information and referral service. Information sources include (a) printed and non-printed material; (b) machine-readable databases (including computer-assisted instruction); (c) the library's own catalogues and other holdings records; (d) other libraries and institutions through communication or referral; and (e) persons both inside and outside the library.

When a staff member uses information gained from previous use of information sources to answer a question, the transaction is reported as a reference transaction even if the source is not consulted again. *[italics added]*

If a contact includes both reference and directional services, it should be reported as one reference transaction.

Duration should not be an element in determining whether a transaction is a reference transaction.

Sampling based on a typical week may be used to extrapolate to a full year.

A directional transaction is an information contact that facilitates the logistical use of the library and that does not involve the knowledge, use, recommendations, interpretation, or instruction in the use of any information sources other than those that describe the library, such as schedules, floor plans, and handbooks.

4. Methodology

Following the acceptance of our proposal, we met and consulted with senior staff at HPL before beginning observation in order to develop the scope the study and parameters to be used. The following determinations were made.

Monitoring hours:

- Over a two- to three-week period, each session on the information desks on the second, third and fourth floors of Central Branch would be monitored in two-hour shifts.
- A morning session consisted of any two consecutive hours between 9:00 am–1:00 pm
- An afternoon session consisted of any two consecutive hours between 1:00 pm–5:00 pm
- An evening session consisted of any two consecutive hours between 5:00 pm- 9:00 pm
- That worked out to 17 two-hour sessions at each of the morning, afternoon, evening shifts on three floors at Central or 17 sessions x 2 hours x 3 locations = 102 hours for a fairly comprehensive snapshot.

- Four two-hour sessions at each of the three branches Terryberry (at both desks), Sherwood (at both desks), and Dundas were also completed. That was 4 sessions x 2 hours x 3 locations for a brief snapshot of 24 hours.
- Monitoring totalled 126 hours.

Scope of questions:

HPL staff chose to include Phone and In-Person questions, and to exclude: AskON and AskHPL e-mail transactions, plus staff-to-staff calls about library administration, requests for staplers, etc. NOTE: This study also did not include questions asked either at circulation desks or while reference staff roamed on the first floor.

We met again with senior staff after 22 hours of data gathering to review questions and observations and agreed to the following refinements:

- That tracking responses provided real value on how needs were filled and should be included
- That if the same customer asked more than 1 discrete question, they would be treated as separate questions but tracked as coming from the same person.
- To divide the traditional “Directional” category into:
 - those which are collection-focussed, such as “where is poetry?” or “can you show me where the 600 numbers are?” (these would go under “borrower assistance” if further clarification was done along the way).
 - and ‘place’ such as “where is the washroom?”
- That bookings of piano and borrowing the chess set (both 4th floor Central only) would be captured under “Library Info” and notes.
- That the following categories be added to ‘Response’: Suggested Purchase and ILLO.
- We also found it useful to gather a number of categories together as ‘Admin’ functions such as: Booking an instructional class, library info or transfer to department, along with applications for job or for volunteering at the library.
- Several sub-categories were added under the Type of Question to provide for better description. Previously, only one choice had been allowed. Now we would be able to note Fiction/Non-Fiction; Homework Help/Academic; distinguish between Directional questions as noted above; categorize the question as requiring Ready Reference or In-Depth Reference.
- The data-gathering tool evolved from an Excel spreadsheet to an Access database. The Access database provided much better and quicker entry. The database would be imported into Excel for the purposes of creating reports.
- We agreed to provide the Access database to HPL upon completion of the project.

5. Data Summary

Part One - Transaction data

Transactions per location			
<i>Location</i>	<i>Transactions</i>	<i>Hours</i>	<i>Average Transactions/Hr</i>
Central second	441	34	13
Central third	438	34	13
Central fourth	263	34	7
Total Central	1142	102	11
Sherwood First	58	4	15
Sherwood Second	48	4	12
Total Sherwood	106	8	13
Terryberry first	56	4	14
Terryberry second	41	4	10
Total Terryberry	97	8	12
Dundas	46	8	6
Total Transactions	1391		

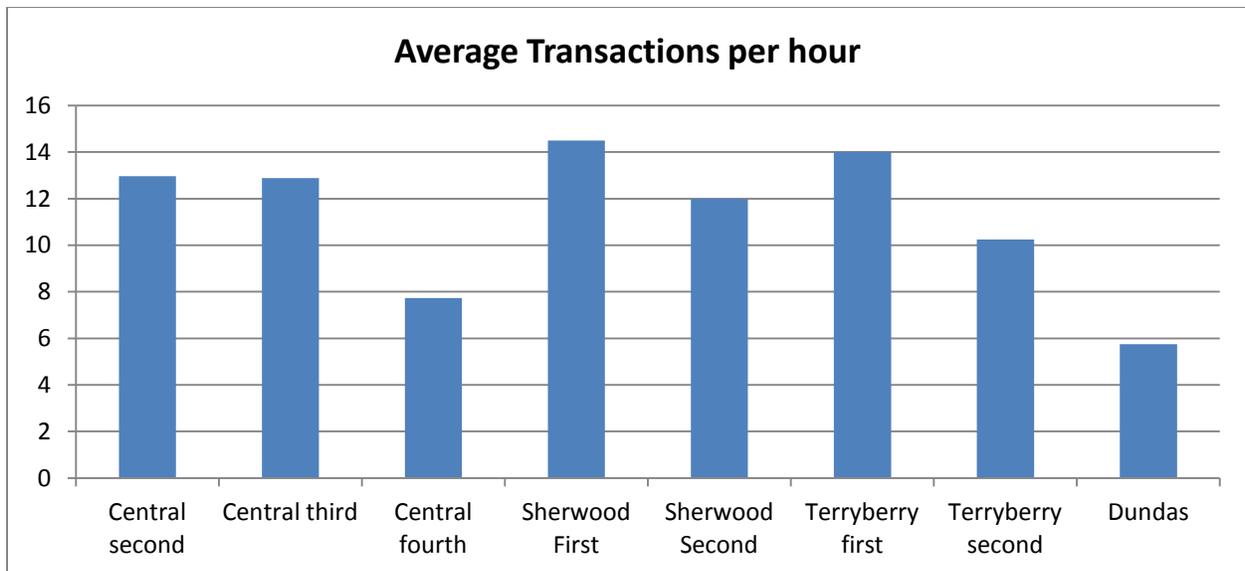


Figure 1

Transactions per hour are an average. The total number of transactions at the branches was a very small sampling and will not be as statistically meaningful as the numbers for Central.

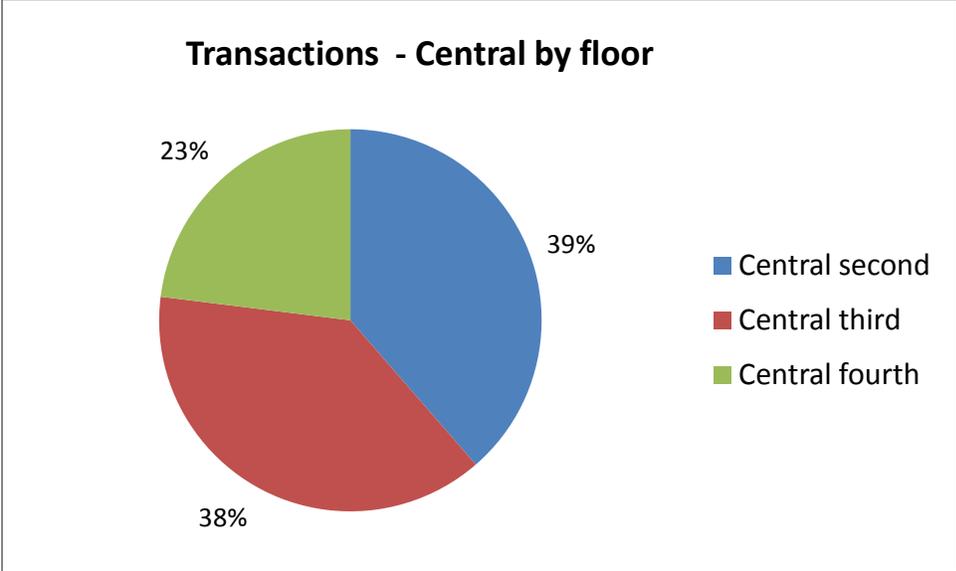


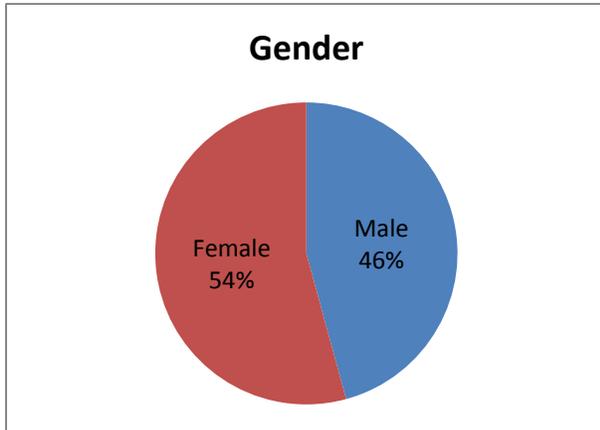
Figure 2

The results for Central seem to confirm the accepted wisdom that the 4th floor is now half as heavily used for reference transactions as the 2 lower floors. This may have something to do with the removal of public workstations?

Part Two - Demographics

Gender

Gender of customers	
Male	633
Female	748

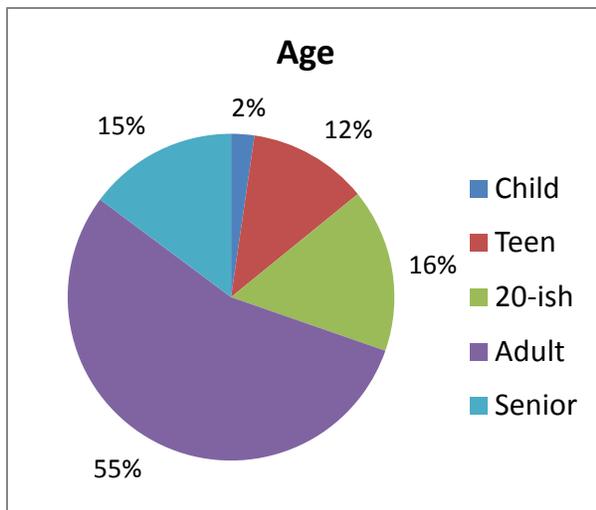


This reinforces the common knowledge that slightly over half of all users are female –Perhaps slightly more than the true ratio of females to males in the general population. We observed that many females were at the library acting as assistants or advocates to people actually using the library resources (e.g. bringing in an elderly person or helping a child with homework).

Figure 3

Age

Age	
Child	31
Teen	163
20-ish	223
Adult	762
Senior	200



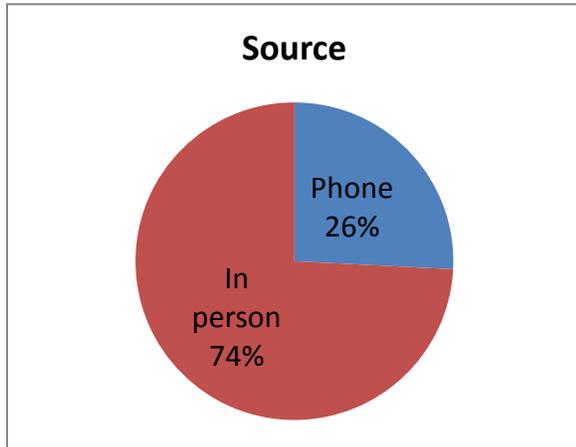
We can't be sure if this reflects the national breakdown for age categories in public library usage... but neither was this part of the sampling very scientific. For all of the telephone questions, the determination of 'age' was a very rough guesstimate.

Figure 4

Part Three - The Questions/Transactions

Source of Transactions

Source	
Phone	360
In person	1031



Even with the switch to having all phone calls come to the information desks, the physical library as a place to come and get information is still well-used. It would be interesting to look at this along with the statistics from AskHPL and AskON. All locations monitored acted as community hubs.

Figure 5

Duration of Transactions

Transaction Duration			
<i>Duration in Minutes</i>	<i>Total</i>	<i>In person</i>	<i>By phone</i>
1	662	481	181
2	366	284	82
3	161	124	37
4	79	40	19
5	59	58	21
6 - 10	46	31	15
11 - 15	15	10	5
> 15	2	3	0

Figure 6 below and the table above show transaction durations. They appear in minutes and are rounded up to the next whole minute. So a transaction noted as having taken one minute has taken one minute or less, etc. **Figure 7** divides the two types of directional questions – ones where people were looking for part of the collection, as in “where is the poetry section” or “where do I find music CDs” as opposed to questions relating to place, as in “where is the washroom?”

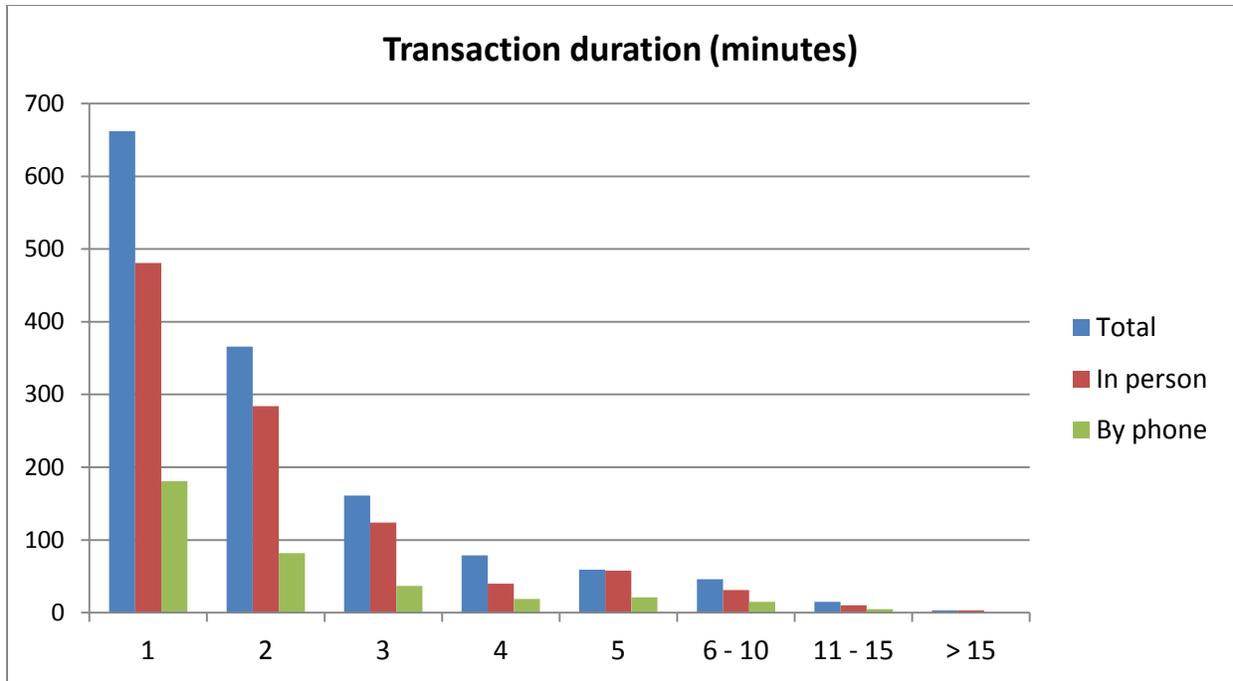


Figure 6

Type of Transaction

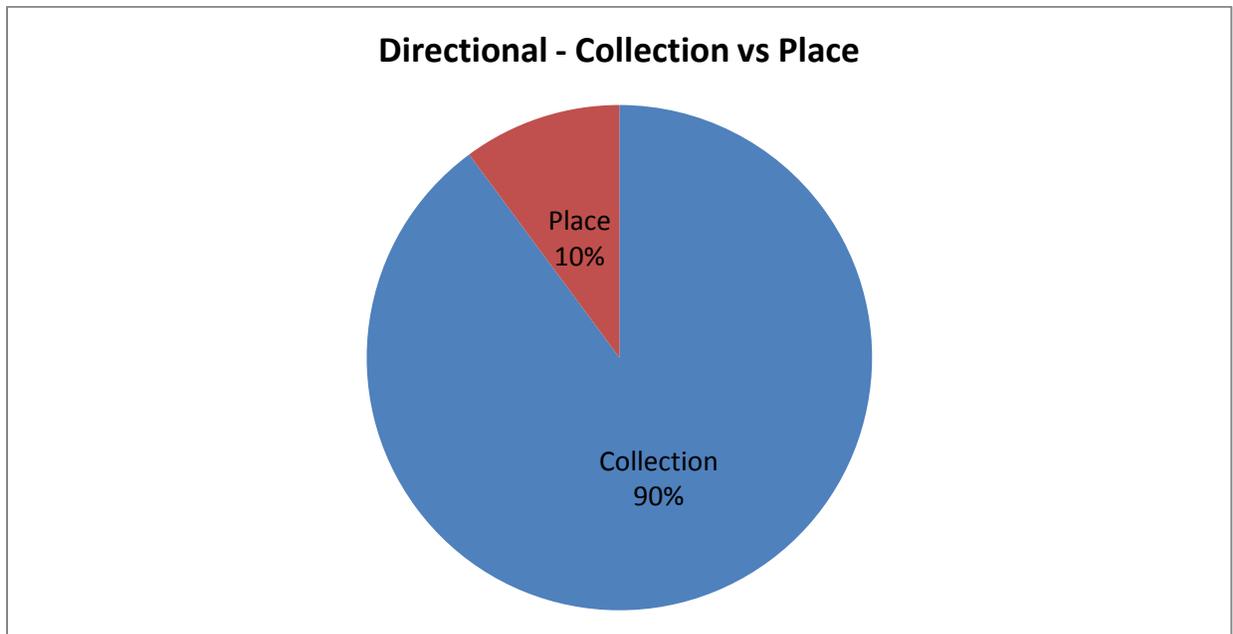


Figure 7

Transaction Categories

Question type	Number	Per cent
Non-Fiction	439	22%
Borrower Assist	330	17%
Direction - Collection	272	14%
Lib Info	214	11%
Tech/Computer	115	6%
Fiction	81	4%
Ready Ref	77	4%
Author/Title/Circ	73	4%
Reader Advisory	53	3%
Other Subject	57	3%
Photocopier	45	2%
Direction - Place	30	2%
Career	30	2%
Printer	29	1%
Community	27	1%
In-depth Ref	22	1%
Homework	19	1%
Health	19	1%
Local History/Archives	18	1%
Academic	13	1%
Complaint	10	1%
Government	5	0%
Genealogy	1	0%
Total	1979	

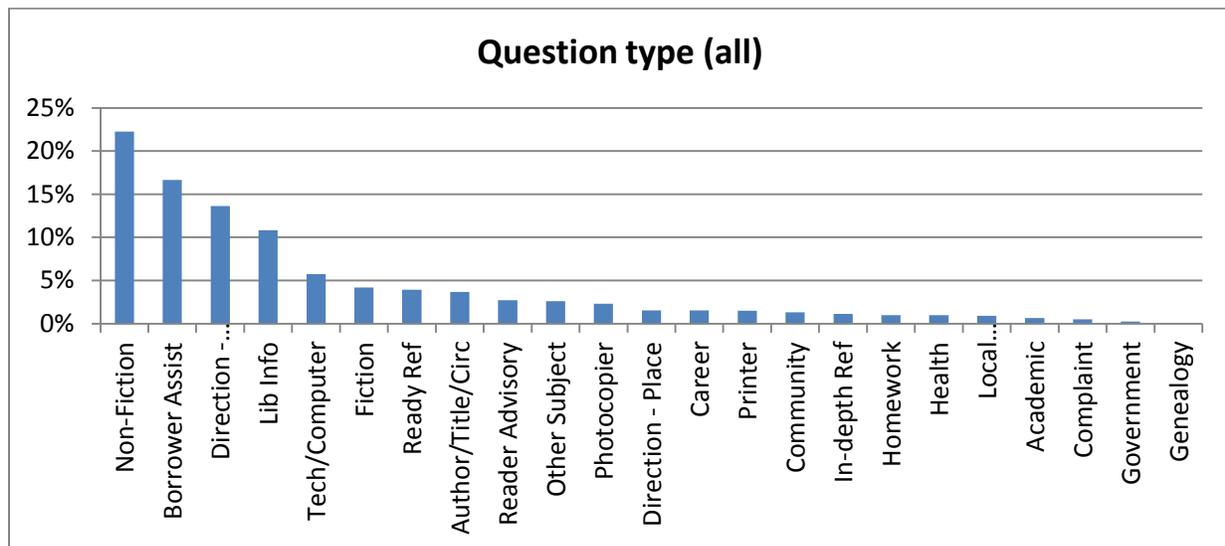


Figure 8

These are the original categories used and since both questions and responses could be placed into one or more categories, there is overlap.

Transaction Categories 2

Question type	Number	Per cent
Other Subject	57	36%
Career	30	19%
Community	27	17%
Health	19	12%
Local History/Archives	18	11%
Government	5	3%
Genealogy	1	1%
Total	157	

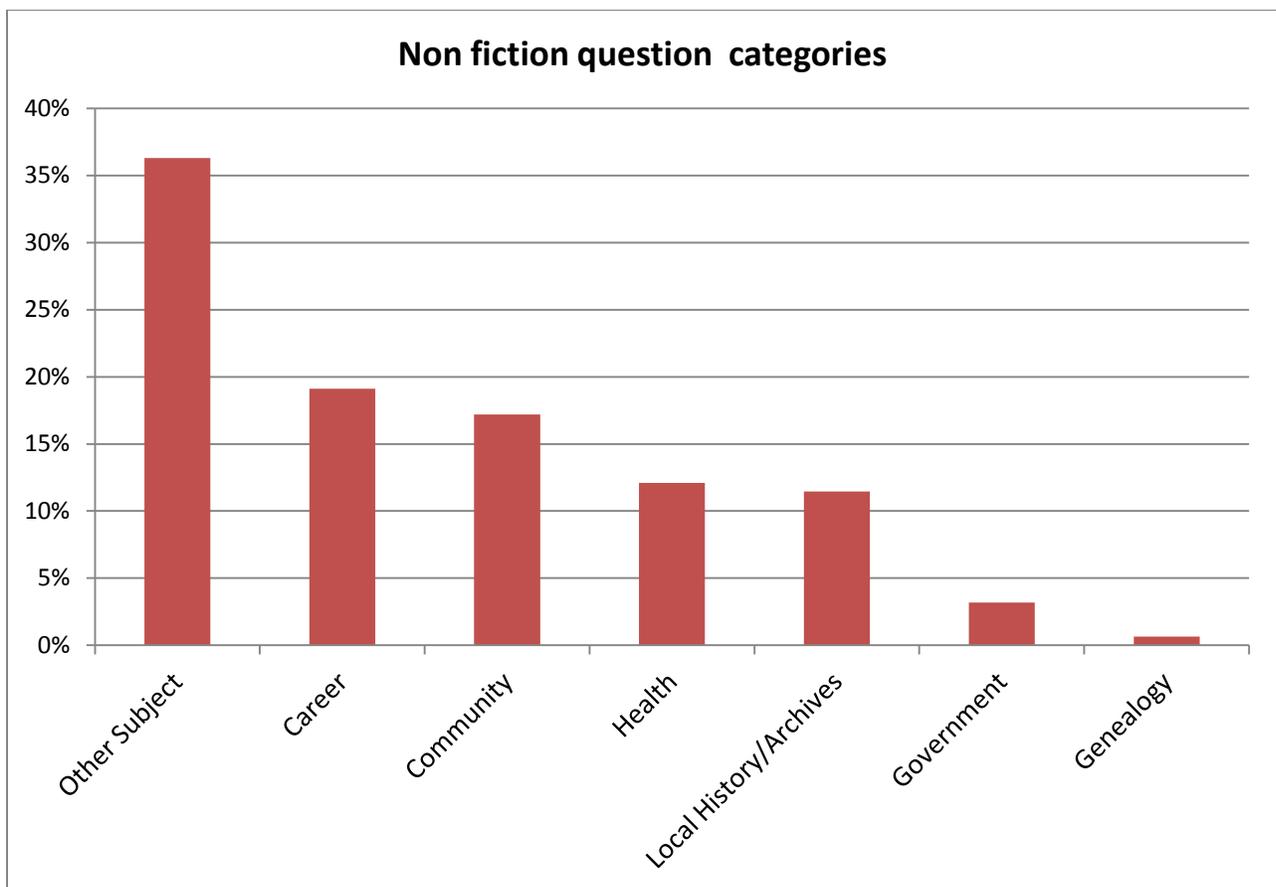


Figure 9

These are the specific subject areas in the non-fiction category that were deemed of special interest. However, at 150 they reflect less than 10 percent of transactions. The career questions were strongest at Dundas and Central due to the presence of the Career Centres.

Transactions De-duped

Question type	Number	Per cent
Borrower Assist	330	25%
Direction - Collection	272	21%
Lib Info	214	16%
Tech/Computer	115	9%
Ready Ref	77	6%
Author/Title/Circ	73	6%
Reader Advisory	53	4%
Photocopier	45	4%
Direction - Place	30	2%
Printer	29	2%
In-depth Ref	22	2%
Homework	19	1%
Academic	13	1%
Complaint	10	1%
Total	1302	100%

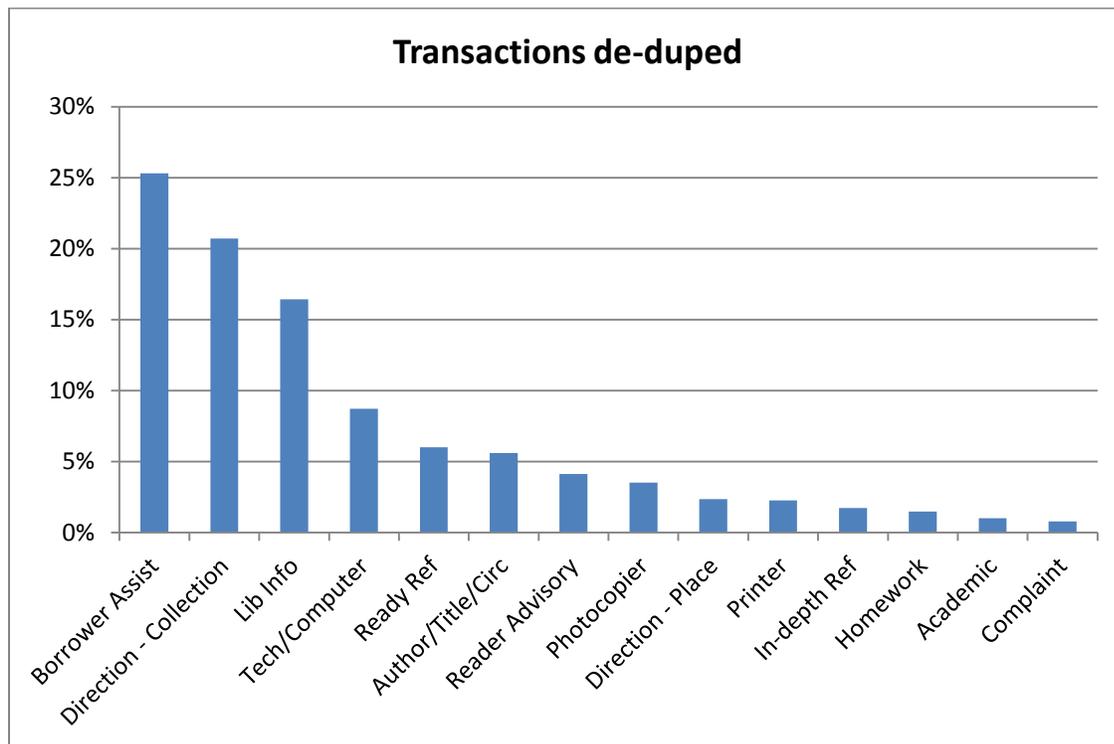
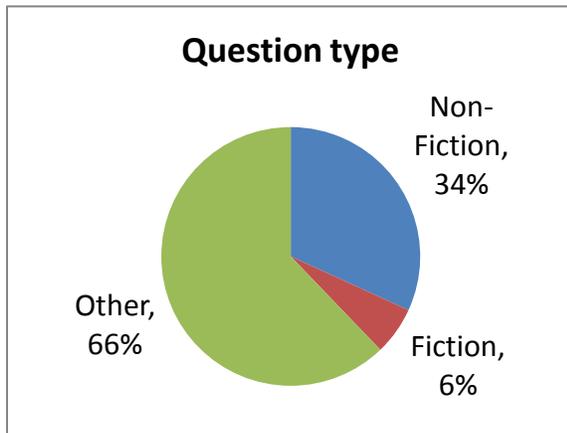


Figure 10

This chart gives a clearer perspective on the overall traffic at the service points. By eliminating Fiction and Non-Fiction as broad categories along with the subset of specific non-fiction subjects we can see the nature of the great majority of user questions.

Fiction/Non-fiction/Other Categories



Much is reflected in this simple pie chart. Fully 66% of transactions tended to be borrower assistance, administration (including all technical and library informational questions), directional, and other types of questions. However, the split isn't very 'pure'... many directional questions couldn't be assigned a 'fic/non-fic' designation e.g. 'where are the DVDs?' – but they were classified if known such as, 'where are the woodworking books?'

Figure 11

Questions at Branches

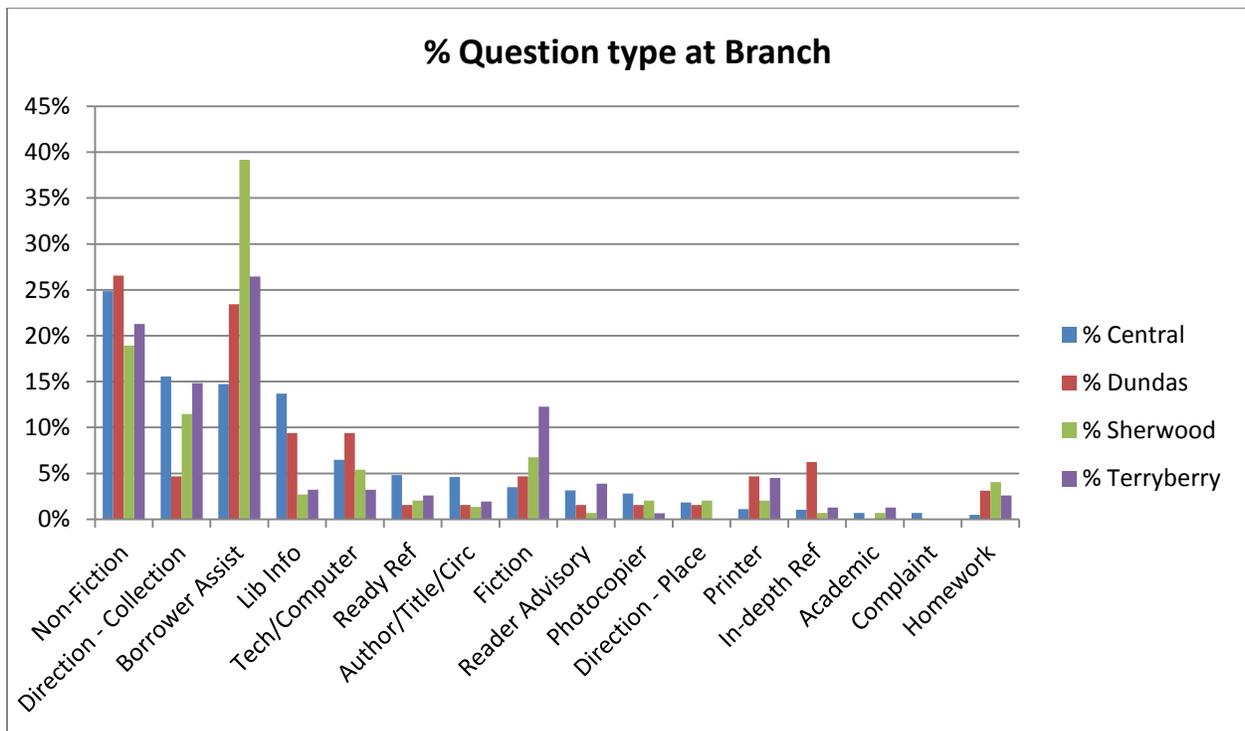


Figure 12

Not surprisingly Sherwood first floor desk leads the way in borrow assistance questions as it is a combined circulation and reference service point.

Part Four - Responses

Response type	Number	Per cent
Roaming	299	22%
Horizon	268	20%
Verbal Guidance	224	17%
Print	116	9%
Transfer	102	8%
Web	79	6%
Other	66	5%
Instruction	51	4%
Non-Print	45	3%
BiblioCommons	40	3%
HPL Website	25	2%
E-Resources Database	13	1%
ILLO	9	1%
Suggested Purchase	4	0%
Total	1341	

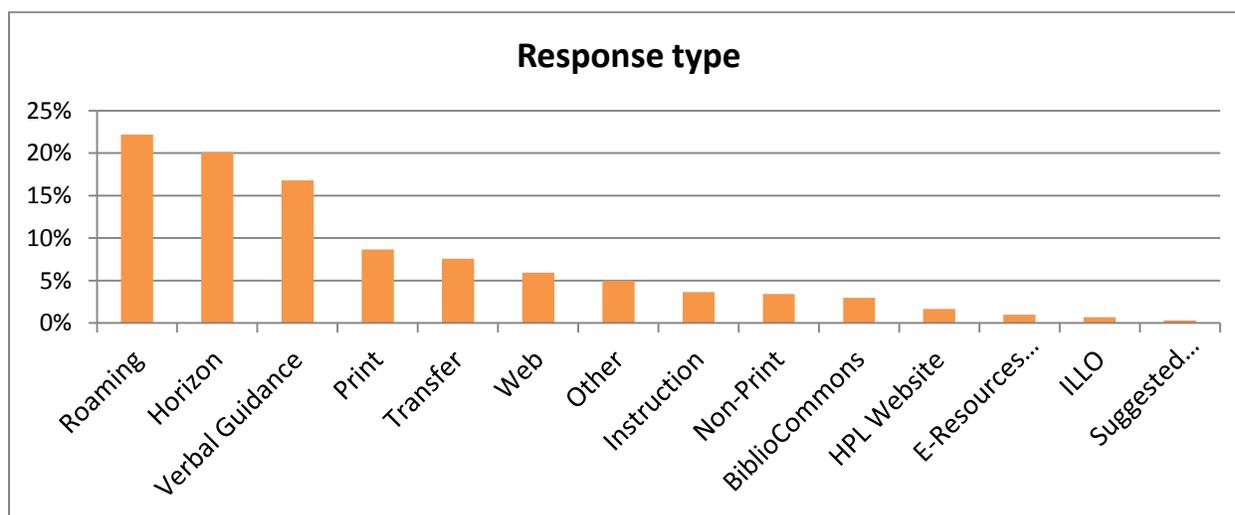
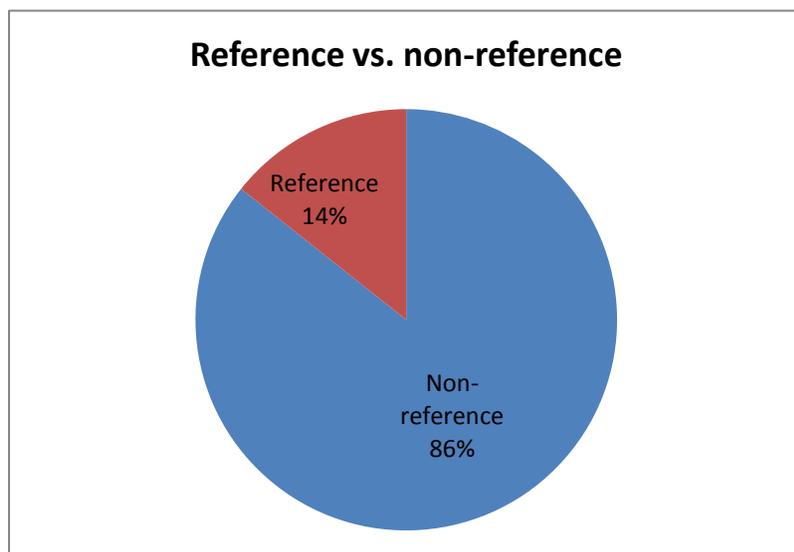


Figure 13

It is likely that 'roaming' is not actually as accurate as we would have liked it to be. Due to a difference in interpretation, one of us included roaming as a response type along with any situation that required a staff member to leave the desk to deal with a technical problem (photocopier, printer, etc.) while the other only tracked this when the transaction was truly of a 'collection' or 'reference' nature. Therefore the figure should either be higher or lower than it actually is. We tended to note 'Horizon' whenever the catalogue needed to be consulted – however, this often occurred during 'borrower assistance' transactions as well.

Part Five – Conclusion: Reference Vs “Everything Else”

Question type	Number	Per cent
Borrower Assist	330	25%
Direction - Collection	272	21%
Lib Info	214	16%
Tech/Computer	115	9%
Author/Title/Circ	73	6%
Photocopier	45	3%
Direction - Place	30	2%
Printer	29	2%
Complaint	10	1%
Non-reference	1118	
Ready Ref	77	6%
Reader Advisory	53	4%
In-depth Ref	22	2%
Homework	19	1%
Academic	13	1%
Reference	184	
Total ref + non-ref	1302	

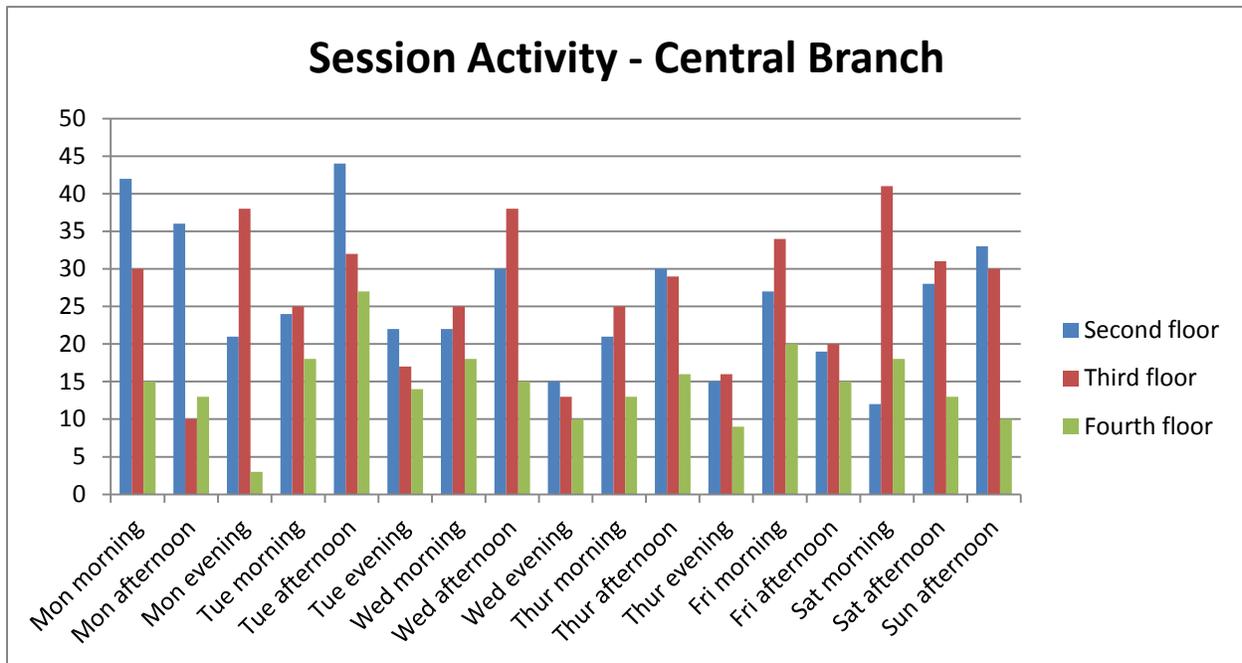


In conclusion, we felt that a realistic definition of 'Reference' could be reached by combining both 'ready' and 'in-depth' reference categories along with 'Readers' Advisory', Homework' and 'Academic' transactions.

Figure 14

Part Six – Session Activity (supplemental request)

Session	Second floor	Third floor	Fourth floor
Mon morning	42	30	15
Mon afternoon	36	10	13
Mon evening	21	38	3
Tue morning	24	25	18
Tue afternoon	44	32	27
Tue evening	22	17	14
Wed morning	22	25	18
Wed afternoon	30	38	15
Wed evening	15	13	10
Thur morning	21	25	13
Thur afternoon	30	29	16
Thur evening	15	16	9
Fri morning	27	34	20
Fri afternoon	19	20	15
Sat morning	12	41	18
Sat afternoon	28	31	13
Sun afternoon	33	30	10
Totals	441	454	247



6. Concluding thoughts

- a. We do not have long range data to confirm this but if Hamilton is typical of other communities in North America, and if anecdotal evidence from staff is accurate, there has been a gradual decrease in overall reference questions - both quick and otherwise over the past five years. As a result HPL has collapsed quick reference, and with it the switchboard function, and shifted these tasks to the reference desks at Central.
- b. The result is that the Reference Desks now receive all types of reference questions as well as all system calls (including a transfer to accounts receivable for example), and generic library information and policy (including hours, locations, loan policies, etc.) as well as circulation triage. Frequently, when the Circulation/Customer Service points are too busy to answer transferred calls, the Reference staff are left to attempt to deal with the circulation issues relating to fines and other sensitive policy issues that traditionally have not been handled by Reference staff at HPL.
- c. While it is beyond the scope of this study, and may already have been gathered by HPL separately, we wonder about the nature of the information and collection assistance questions that are directed to the customer service desks and roaming staff on the first floor at Central. How many of these are questions which would have been better handled by Reference Staff? How many circulation-related questions do Reference Staff handle that would be better handled by Circulation Staff?
- d. We note the increasing impact of more complex technology – photocopiers, printing, payments through accounts, BiblioCommons registration requirements, networked telephones and workstation booking. The public are faced with more technical challenges which result in a growing number of questions and problems to resolve for the Reference front line staff.
- e. In summary it would appear that there is an ongoing shift to questions of a directional or technical nature and a significant reduction in information needs of the type traditionally defined as ‘in-depth’ or even ‘ready reference’.

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Note: RUSA is a division of The American Library Association

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Recommended reading

Hendrix, Jennifer C. *Checking Out the Future: Perspectives from the Library Community on Information Technology and 21st-Century Libraries.* ALA Office for Information Technology. Policy Brief No. 2, February 2010

Appendix A

Description of terms used in gathering data.

Field Label	Description	Notes
Visit Date	Automatically generated	
Visit Time	Automatically generated	
Same Person	Yes/No	Must be last person – otherwise treated as a completely new question AND person
Gender	Male/Female/N/A	N/A if person is calling or asking on behalf of an organization
Age	This is a range	Best guess (especially if transaction is over phone)
Source of inquiry	Phone or In person	
QUESTIONS	Choice of one or more of:	
Work Type	Homework – K-12 Academic - Postsecondary	This can sometimes be a judgement call
Admin	Printer or Printing issues	
Admin	Photocopier issues	
Admin	Lib Info	Basic info like branch location or hours right up to question about policies. Often results in a transfer to another department
Admin	Tech/Comp -	Booking, help with wireless, etc.
Direction	Directional	Collection-related – where do I find music CDs?
Direction	Place	Where is washroom? Where do I checkout?
Reference	Ready ref	Traditional ready ref using trusted print or web resources. E.g. Checking Canada411, or using print or web to answer simple questions such as “at what latitude is Kingston, Ontario?”
Reference	In-depth ref	Traditional in-depth ref where staff is using their own knowledge to advise and assist and/or clarifying or checking scope using specialized tools; may involve several types of resources and media to complete the transaction – staff takes initiative
Misc	ATB	Simple author/title/borrower help/placing a hold on specific item
Misc	Borrower assistance	More than above such as suggesting other works by same author or titles in series - may also involve assistance with account information, fines, renewals, etc.
Misc	Reader’s advisory	Full advisory with reference Q&A interview where staff uses their own knowledge to advise and assist
Complaint	Yes/No field	Details in notes

Fiction	Fiction or Non-Fiction	Basic distinction
Non-Fiction Subject	Choice of one of: Career, Community, Genealogy, Government, Local History/archives, Health, Other	Assuming these are main topic areas – data will tell – “Other” has both description and notes field [note: not intended to be comprehensive - simply tracking a few specific areas of particular relevance at the moment]
RESPONSES	Choice of one or more of:	
	Horizon Roamed Print Non-Print BiblioCommons HPL Website Web E-Resources Databases Instruction Verbal Guidance Suggested Purchase ILLO Transfer Other	Transfer can be to another department internally, another branch, or another agency – internal (e.g. Inform Hamilton) “Other” has both description and notes field
Duration	1 = <1 minute 2 = <2 minutes, etc.	This is intended to be as precise as possible, but since more than one transaction was often going on at once, this is not exact – not determined by program but by monitor

NOTE 1: One person with two discrete questions is treated as two discrete transactions.

NOTE 2: There may not be enough data gathered at the branches to make it meaningful. We will offer comments about significant differences noted during the monitoring.