



PLANNING FOR EFFECTIVE EVALUATION

Why evaluate?

How will you know if your chat reference service is meeting your goals and objectives? Are you making the best use of your available resources? Does it meet the needs of customers? Evaluation will be your most important tool for course correction and for determining future directions.

Joann Wasik of the Virtual Reference Desk provides an [overview](#) of the evaluation process.

As you plan for evaluating your new service, ask yourself these questions:

- Are our goals and objectives for the service clearly stated? Will they provide the foundation that we need for evaluation?
- Do we have service standards for the individual transactions?
- What kinds of reports do we want to have about usage of the service?
- Are we willing to make a commitment to service improvement based on what we discover?



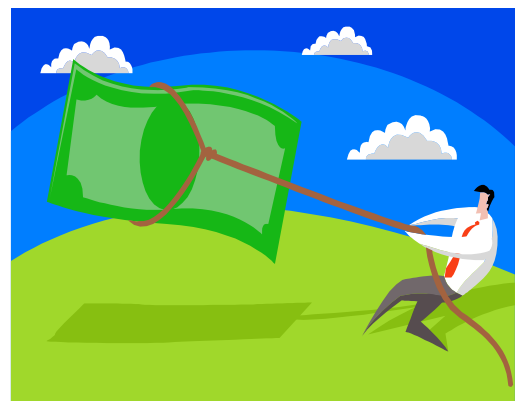
What will you evaluate?



- Usage, as measured by the reports and statistics generated by the software.
 - Customer satisfaction, as measured by user comments and tools such as surveys and focus groups.
 - Staff reaction, from those both directly and indirectly involved with the service.
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- Staff performance, as measured by review of reference transcripts.

Charles McClure and David Lankes identified four components for measuring the effectiveness of chat reference services:

- Outcome measures (quality of the answers)
- Process measures (effectiveness and efficiency)
- Economic measures (costs)
- User satisfaction measures



Some resources to help

Coffman, Steve (2003). *Going Live: Starting and Running a Virtual Reference Service*. American Library Association.

In particular, look at “Evaluating Virtual Reference Services,” pages 63- 70.



The [Virtual Evaluation Toolkit](#) was developed by the Washington State VRS Project.

Virtual Reference Desk

(2003) [Facets of Quality for Digital Reference Services](#).

Lipow, Anne G. (2002) *The Virtual Reference Librarian's Handbook*. Neal-Schuman. In particular, look at “Listen to the Evaluations of Your Users,” pages 119-121.

McClure, Charles et al (2002). *Statistics, Measures, and Quality Standards for Assessing Digital Reference Library Services: Guidelines and Procedures*. Information Institute of Syracuse.

Meola, Mark and Stormont, Stan (2002) *Starting and Operating Live Virtual Reference Services*. Neal-Schuman. In particular, look at “Evaluating Your Live Reference Service,” pages 145-158.