
LibAnalytics: Reference, Outreach, & Instruction Documentation

Data Definitions and Workflows

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Abstract

The Reference, Instruction, and Outreach dataset is designed to track the consultation, reference, outreach and instruction activities of library staff. The purpose of the data is to provide information about the activities of library staff providing key reference and education services to the community. The data will be submitted to department heads and Yale University Library leaders. The data will also be used collect statistics for submission to a wide variety of reporting agencies (e.g. Association of Research Libraries-ARL and Integrated Postsecondary Education Data System-IPEDS).

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Data Definitions

Reference, Outreach, & Instruction - Form Header

- **Question/Class Name:** If this is instruction enter the class name or the specific Yale course number. If a question, enter brief description of it.
- **Details:** Optional, enter more specific information.
- **Time Stamp:** Defaults to the day you create the data entry. Use the calendar to change this to the day of the transaction if necessary. Data keeping works best if you try to enter data the same day as the interaction. Entering the specific time is important for instruction activity.
- **Entered By:** The name associated with the login account displays by default.
- **Internal Note:** Option; use for keyword tagging.

The screenshot shows a form header with the following fields:

- Question/Class Name (140 chars max):** A text input field with a character count and a refresh icon.
- Details:** A large text area for optional information.
- Time Stamp:** A date and time picker.
- Entered By:** A dropdown menu showing 'Tudesco, Sarah'.
- Internal Note:** A text input field for keyword tagging.

Interaction Type

The Interaction Type field describes the nature of the transaction. The field is required; all the interactions recorded in this dataset must be identified.

Interaction Type is a required field.

- **Consultation:** in-depth interaction (more than 15 minutes) with an individual or a small group.

Examples:

- Meeting with a student to discuss topics and sources for a senior essay.
- Assisting faculty with a literature review.
- Showing a graduate student how to use 'Web of Science' to prepare a list of their articles and demonstrate how to retrieve citation statistics.
- Working with an undergraduate to format a bibliography using RefWorks.

- **Question:** quick interaction, typically lasting less than 15 minutes. The answer requires the knowledge, use, recommendation, or interpretation of information resources.

Examples:

- Does the library have a copy of *I know why the caged bird sings* by Maya Angelou?
- Where can I find articles about the honey bee crisis?
- I have a partial article citation. Can you help me find the rest of the citation ?

The screenshot shows the 'Interaction type' dropdown menu with the following options:

- ☐ Consultation (more than 15 minutes)
- ☐ Question (less than 15 minutes)
- ☐ Instruction (please complete 'Instruction' section)
- ☐ Outreach

- I need to read a specific dissertation that is not listed in the library catalog. Is it online?
 - I'm looking for images of the 1909 Yale/Princeton football game, can you help?
 - I'm looking for information about Professor Harry Smith, who taught at Yale in 1882?
 - How do I cite this article in MLA style?
 - Can you buy this book for the collection?
- Instruction: formal, scheduled event. Includes library workshops, research sessions integrated in Yale courses, orientations, and tours.
Examples:
 - RefWorks workshop
 - Library session in English 114B
 - Orientation for new graduate students in History
 - Tour of Sterling Memorial Library for new Yale Faculty
- Outreach: Librarian initiated interaction, promotes and describes services, resources, and collections. Includes emails associated with liaison or personal librarian responsibilities.
Examples:
 - An email sent to your Personal Librarian students.
 - An email asking faculty to comment about new hours for the library.
 - A Facebook message about a class being offered in the library.
 - An appearance at a department meeting to introduce you to faculty and staff.
 - Attending a faculty departmental meeting.
 - A Twitter post highlighting a new database.

Time Spent (Minutes)

Enter the time spent, in minutes, on the consultation, question, outreach, or instruction activity; estimates are fine. Time Spent is a required field.

Time Spent (Minutes)* ?

For instruction, enter the total time spent in the class or on the tour. If you did additional prep work, enter that information in the 'Prep Time (Minutes)' field.

Prep Time (Minutes)

Enter the total prep time spent, in minutes. The Prep Time field is most likely to be useful with the 'Instruction' or 'Consultation' interaction types.

Prep Time (Minutes) ?

Mode

Mode describes the method used to complete the transaction. Mode is a required field.

- In-person: Transaction completed face to face.
 - Consultation/Question: Patron and Staff in same physical location

- Outreach: Attend faculty meeting, attendance at an department open-house
- Instruction: Applies to most instruction types
- Email: Transaction completed by email.
 - Consultation/Question: Inquiry by email (either direct or web form) and answered by staff by email.
 - Outreach: Emails to faculty/students promoting web resources
 - Instruction: *Not Applicable*
- Phone: Transaction completed on the phone.
 - Consultation/Question: Question answered by staff on the phone.
 - Outreach: Phone call to faculty to promote a library resource
 - Instruction: *Not Applicable*
- Chat: Questions received and answered on a chat service (e.g. Google Chat, LibChat, YahooIM)
 - Consultation/Question: Question received and answered on chat client.
 - Outreach: Promotion of service on a chat service.
 - Instruction: *Not Applicable*
- Other: Select if other method is used to complete transaction. The note is optional
 - Consultation/Question: Question answered on a social network (e.g. Facebook, Twitter)
 - Outreach: Promotion done on social networks (e.g. Facebook, Twitter)
 - Instruction: Class or workshop given online (e.g. Webinar or Google Hangout).

Mode ⓘ

☐ In-person
☐ Email
☐ Phone
☐ Chat
☐ Other

Other Note:

Note:

Patron(s) Status

Identify the status of the patrons involved in the transaction. If working with a mixed group of patrons (e.g. workshop with undergraduate and graduate students). Patron(s) status is a required field.

- Undergraduate(s): Current Yale College undergraduate
- Graduate student(s): Current Yale graduate student, all schools
- Faculty: Yale professor (excluding adjuncts)
- Staff: Current Yale employee
- Alumni: Yale University graduates
- Yale other: Use for Yale groups that do not fit other categories
- Non-Yale: Patrons not affiliated with Yale
- Unknown

Mode ⓘ

☐ In-person
☐ Email
☐ Phone
☐ Chat
☐ Other

Other Note:

Personal Librarian

If the transaction is related to the Personal Librarian program, such as outreach activities associated with the programs or consultations/questions from your Personal Librarian students, check the Personal Librarian box.

Special Collections

The Special Collections field should be checked by YUL staff who work in general or integrated units (e.g., Divinity, Arts, International Collections and Research Support) when a transaction involves assisting a patron with collections or services in one of Yale's Special Collections units (e.g. Manuscripts & Archives, Beineicke, Historic Sound Recordings).

This box should not be used by staff working in units that are entirely Special Collections; those transactions will be identified for statistical purposes as Special Collections-related by the Library/Department field.

Instruction

If the transaction is marked as 'Interaction Type'=Instruction, fill in the fields in the Instruction section.

Complete the form for **all** instruction sessions. If the session was co-taught with another librarian, **both** staff members should complete an entry, noting their partner(s) in the Co-teacher(s) field.

Instruction Type

- Library workshop/class: a scheduled session; part of the Library's research education program.
- Yale course-integrated: presentation for a class given for credit; presentation during official class time.
- Yale other (not course-integrated): sessions sponsored by other Yale groups, not credit-granting courses.
- Orientation: scheduled overview of library collections and services.
- Tour: physical tour of library spaces.
- Orientation & Tour: sessions include both an overview of library collections and services and a physical tour of library spaces.
- Non-Yale programs: Activities sponsored by groups or for groups who are not part of Yale. For example, an instruction session about GIS given to New Haven public school teachers. The activity may or may not take place at Yale.

Instruction

Instruction type
☐ Library workshop/class
☐ Yale course-integrated
☐ Yale other (not course-integrated)
☐ Orientation
☐ Tour
☐ Orientation & Tour
☐ Non-Yale programs

Number attending

Cross-listed class

Co-teacher(s)

Faculty name

Number Attending

Enter the total number of patrons participating in the session; estimates are fine.

Cross-Listed Class

Some Yale courses are listed in two or more departments. In these cases enter other Yale course titles, separated by a comma.

Co-teacher(s)

If the session is taught by more than one staff member, enter the other participants. Please note, all participants should complete a LibAnalytics transaction.

Faculty name

If you work with faculty on a session (for course-integrated instruction or other special program organized by Yale faculty), record their name in this field.

Library/Department

Select your Library/Department. Select the department where you **currently** work. The Library/Department field is required.

- | | |
|---|--|
| • Arts: Arts Library | • MSSA (Manuscripts & Archives) |
| • Arts: Arts Library – Special Collections | • SML (Sterling): Cataloging & Metadata (CMS) |
| • Arts: Arts Library – Visual Resource Center (VRC) | • SML (Sterling): HCRE (Humanities) |
| • Arts: Music Library | • SML (Sterling): HCRE (Humanities): Classics |
| • Arts: Music Library – Historic Sound Recordings | • SML (Sterling): ICRS (Intl)-Africa |
| • Arts: Music Library – Oral History of Music | • SML (Sterling): ICRS (Intl)-East Asia |
| • Bass Library | • SML (Sterling): ICRS (Intl)-Ibero Americano |
| • Bass Library: Undergraduate Programs | • SML (Sterling): ICRS (Intl)-Judaica |
| • Beinecke Library | • SML (Sterling): ICRS (Intl)-Near East |
| • CASSI (Center of Science & Social Science) | • SML (Sterling): ICRS (Intl)-Slavic |
| • CASSI: Engineering | • SML (Sterling): ICRS (Intl)-Near East |
| • CASSI: Geology | • SML (Sterling): ICRS (Intl)-Slavic |
| • CASSI: Management | • SML (Sterling): ICRS (Intl)-South Asia |
| • CASSI: Maps Collection | • SML (Sterling): ICRS (Intl)-Southeast Asia |
| • CASSI: Math | • SML (Sterling): Library Information Technology (LIT) |
| • Divinity Library | • SML (Sterling): Preservation |
| | • Yale Center for British Art (YCBA) |