

**Workshop Title: Implementing the READ Scale  
(Reference Effort Assessment Data) Tool At Your  
Institution: Introduction, Implementation and  
Outcomes**

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**Abstract:** The READ Scale is a qualitative statistical tool for use in measuring reference effort, knowledge, skill and teachable moments that occur during a transaction developed by Gerlich<sup>1,2,3</sup>. Approximately 300 libraries from all over the world have inquired about using the Scale at their institutions: public, health sciences, special, government and academic – public, private of all sizes - in addition, the READ Scale has been incorporated in the the online statistical data gathering packages Libstats, SiteScripter, and DeskTracker and noted on the NNLM North West website. At this workshop session, interested participants will be introduced to the benefits of the READ Scale by Gerlich and Berard, and taken through the process of implementation of the tool at your institution. Grant Gerlich will emphasize the Scale application in archives and special collections data gathering. Discussion of engaging stakeholders, assessing training and participation outcomes will be part of the session. Using the results of the outcomes from statistics for reporting will complete the workshop experience.

**Keywords:** READ Scale, Reference, Assessment, Statistics, Qualitative Measures, Quantitative Measures, Outcomes, Special Collections & Archives

**1. Introduction. The Benefits using the tool and Engaging Stakeholders**

What is the READ Scale? Gerlich and Berard (2007, 2010). Gerlich (2009) shares the inspiration for developing the READ Scale – interviews with both reference librarians and administrators that agreed 100% the traditional counting method was not a measure of the effort nor knowledge taking place – an undervalued service. Changing how we record reference statistics takes work – it means changing how we do something the same way we always have – what are the benefits? Gerlich and Berard address the benefits, how to engage stakeholders in why it can be beneficial to them to adopt the Scale. A survey will be required to be completed prior to attendance (participants, size of institution, number of students / users, type of institution, etc.) to assist the workshop leaders with creating groups for discussion / problem solving as needed. Grant Gerlich will address use in archives / special collections.

**2. Implementing the Scale**

In this section, the workshop leaders will discuss ways to implement the READ Scale. Gerlich will address Academic, Public and Health Sciences – Berard will discuss the STEM and Special Libraries and Grant Gerlich will address implementing the Scale using archives / special collections nomenclature. Groups will work together to create sample implementation materials and exercises that enable a confident approach to introduction at their home institution.

**3. Assessing Training and Planning Outcomes**

Workshop leaders will review training users overall and hone in on desired outcomes for using the READ Scale based on discussions. For this exercise, like institutions will be

paired to enable a shared understanding of size, budget and so on that might impact the training options and outcomes desired.

#### **4. Using the READ Scale statistics for reporting purposes**

The workshop leaders discuss how using the data gathered from using the READ Scale can be used to create reports that illustrate the activities of reference services to stakeholders and administrators that will build support for reference and research support services. Various papers / presentations published will be included in packets for discussion and review, citing examples of how using Scale data for reports to stakeholders and administrators based on library needs as well as build support among colleagues.

#### **References**

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**Duration: 3 hours**

