

BEHAVIOR INSTRUMENT

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Instructions for Library Managers

This instrument is designed to help you assess how library staff have put what they learned into practice following your staff development activities. It uses the technique of “mystery shopping” in which an individual poses as a library patron to experience library services first-hand and then provide feedback to library management. Mystery shoppers follow a protocol determined by the library, asking specific questions or performing specific tasks. The mystery shopper then completes a questionnaire describing the experience. Mystery shopping can be conducted in person, on the telephone, or online.

In retail, hospitality, and similar sectors, mystery shopping services are delivered by specialized companies. A directory of companies is available from the Mystery Shopping Providers Association, a North American trade association. You can search the association’s at www.mysteryshop.org.

To lower expenses, you may perform your own mystery shopping using library staff or volunteers. This can work very well, as long as the staff member or volunteer is not known to those they will encounter during the process. Conducting your mystery shopping by telephone may reduce the chance that your shopper is recognized. You might also consider trading mystery shopper services with another agency or nonprofit or with a neighboring library. Your staff or volunteers can act as mystery shoppers in the other organization and their staff or volunteers can act a mystery shoppers in yours.

Some organizations have adapted the concept of mystery shopping to provide immediate recognition to staff members who deliver excellent service. In those instances, the mystery shoppers reveal their identity and provide the staff members with a small token of appreciation. This approach can prove challenging in libraries, however, because the mystery shopper must be very familiar with the behaviors that you are seeking to measure. For example, the mystery shopper would need to be very familiar with the personal finance resources in order to determine whether the staff member provided an appropriate answer to the question. In addition, once a mystery shopper’s identity is revealed to library staff, that individual cannot perform future mystery shopping activities in the library.

Consult your employee handbook, union contract, and/or human resources department for guidance about implementing mystery shopping at your library.

Instrument

Instructions for mystery shopper: Please complete this questionnaire after finishing your mystery shopping interaction.

Date and time:

Library location:

Question asked (choose one per interaction):

- A. Do you have any books on planning for retirement?
 - B. How can I check my credit score?
 - C. Can you help me find books for my kids about why they should save their money?
 - D. Where can I find information about buying a house?
 - E. Do you offer any workshops to help people manage their money better?
 - F. Do you know any good websites about paying for college?
 - G. Are there any agencies in town that help with foreclosures?
 - H. Can you show me how to use the library's investment database?
1. How did the staff member initially respond to your question?
For example, did they express confidence that they could help you? Did they ask you to wait until they located another staff member?
 2. Did the library staff member ask you clarifying questions?
If so, what did they ask?
 3. What resources did the library staff member suggest to answer your question?
 4. Did the staff member show you how to use the resources?
 5. Did the library staff member check to see if you were satisfied with the resources they provided or if you had any further questions?
If so, what did they say?