

**Clemson University**

---

**From the Selected Works of Megan Sheffield**

---

August 3, 2012

## Progress Update to the RR2 Report

Megan Sheffield, *University of South Florida*



Available at: [https://works.bepress.com/megan\\_sheffield/13/](https://works.bepress.com/megan_sheffield/13/)

# Re-envisioning Reference Services at the USF Tampa Campus Library

## An Update to the RR2 Report by the Implementation Team

August 3, 2012

Report written by:  
Megan Sheffield, Team Leader

Input on data collection and statistics from:

Jo Ann DeLarm  
Claudia Dold  
Joe Floyd  
Scott Hicks  
Sandra Law  
Victoria Rocanelli  
Audrey Powers  
Drew Smith

## **Background**

In January 2012, the Re-envisioning Reference II Taskforce released a report with recommendations to change the way reference services were offered at the USF Tampa Library. During the spring semester, three committees formed to guide the transition. These committees consisted of a training committee that developed a comprehensive training program with assessments, a peer leader group in charge of selecting undergraduates for participation in a pilot project to deliver reference services, and the implementation committee in charge of the physical and cultural merge of reference and circulation. May 2012, the library merged its reference desk and circulation desk to a single service point known as the Library Services Desk. Over the course of the summer, we have treated this merge like a test program and have collected a great deal of data about general traffic patterns, customer satisfaction, and staff-librarian relations. This update to the original report reflects specifically on the issues addressed by the implementation team.

## **Data Collection**

Data for this report was gathered from three main sources, which will each be discussed in their own section. The raw data are included as appendices to this report.

First, we collected DeskTracker data. This data allows us to see how many reference questions and what level of difficulty we dealt with at the Library Services Desk on an hour-by-hour basis. Two caveats to keep in mind with this data are that it is only collected on reference transactions (i.e., does not necessarily reflect general circulation transaction traffic), and that it is voluntarily reported, which can lead to underreported numbers if people working at the desk forget (or don't have time) to record each question.


Second, we collected comment cards from our patrons about our level of customer service. These anonymous forms could be filled out by anyone for any type of transaction. Questions generally focused on customer satisfaction, with space for other comments as well.

Last, we sent out a survey to the desk staff, librarians, and peer leaders (now known as GURUs) to collect feedback on the transition process. While we obviously can't go back in time and change how the transition was handled, the information gathered from this survey will show us areas that still need improvement as well as things we did well.

## **Desktracker**

We officially began collection of Desktracker data on May 14, 2012. Since then, we have had over 2000 interactions tracked. The form we use is included below.

# Desk Tracker



Library: University of South Florida

Branch: Academic Services

Desk: Library Services Desk (*switch location*)

User: Megan Sheffield (*my profile*)

Sign Out

Activity

Reports

Submit

Batch Mode | Multiple Entries | Custom Timestamp

**Contact Method** *required [ticksheet]*

☐ Face to Face

☐ Phone

**Purpose of Library Services Desk Contact** *required [ticksheet]*

☐ Directional/General Info (Library)

☐ Directional/General Info (USF)

☐ I need Book X

☐ I need Article X

☐ I need books/articles/info on Topic X

☐ I need to cite Book/Article X

☐ Technical (printing, scanning, computing, etc.)

☐ Other

**Length of Contact Time** *required [ticksheet]*

☐ < 5 minutes

☐ 5-15 minutes

☐ > 15 minutes

**Question/Comment/Notes**

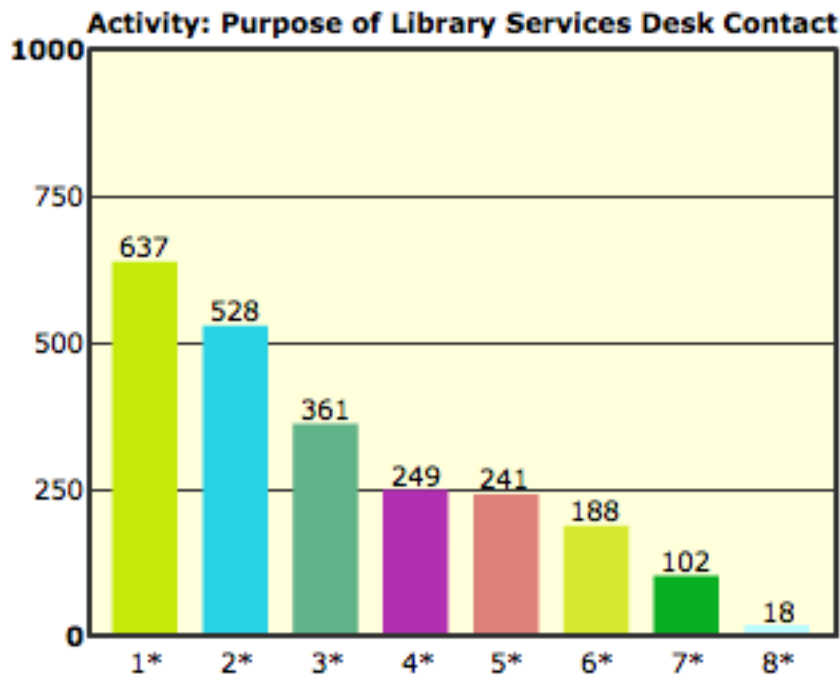
**Outcome (Answer/Sources/Referral/Etc)**

Submit

☐ Escalate to Knowledge Tracker

© Compendium Library Services LLC. All rights reserved.

We found that we get 85% of our questions via face-to-face interactions, while the remaining 15% come through the phone. As we suspected, 78% of our interactions are very brief (less than five minutes), 19% take anywhere from five to 15 minutes, and only 3% of our reference transactions take more than 15 minutes. For information about the types of questions asked, I will refer to the following graph from DeskTracker:



**total responses for *Purpose of Library Services Desk Contact*: 2324**

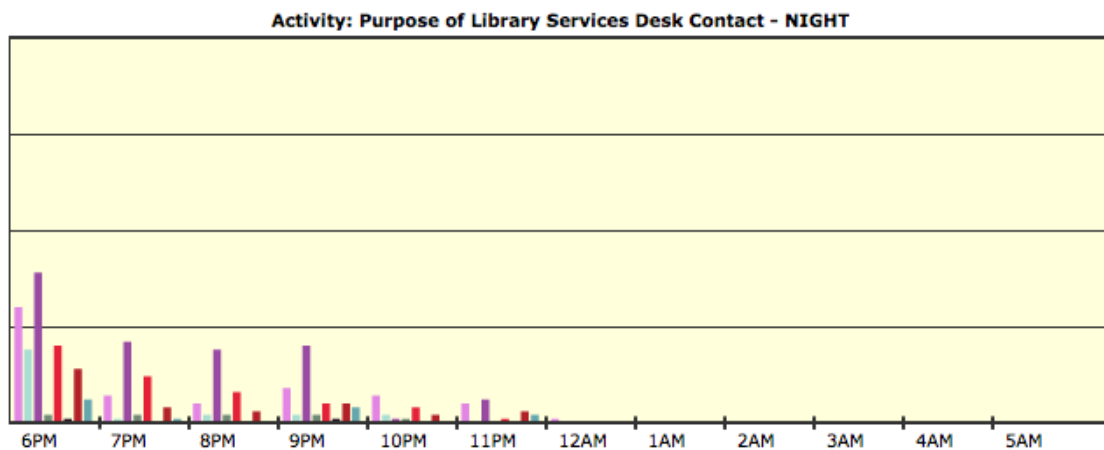
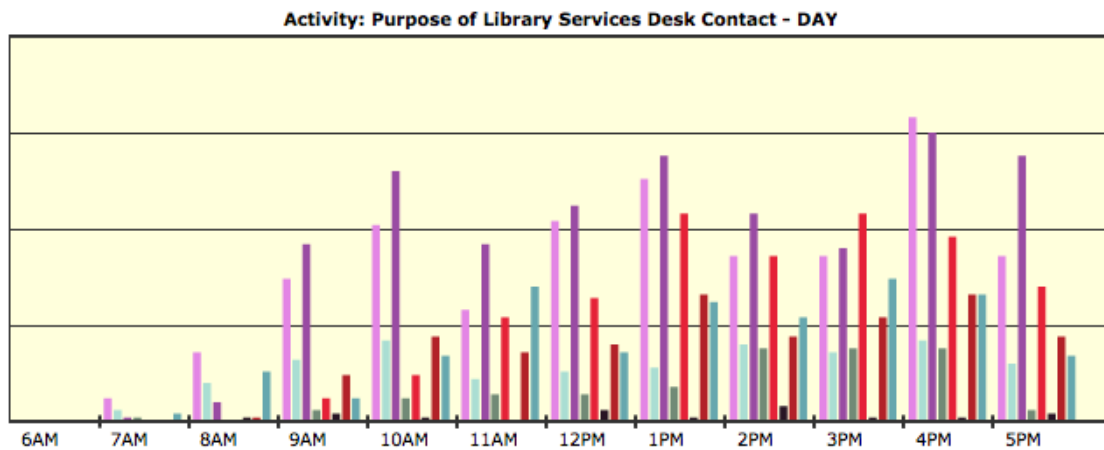
**Key for *Purpose of Library Services Desk Contact***

<b>1 =</b>	637	(27%)	I need Book X
<b>2 =</b>	528	(23%)	Directional/General Info (Library)
<b>3 =</b>	361	(16%)	I need books/articles/info on Topic X
<b>4 =</b>	249	(11%)	Other
<b>5 =</b>	241	(10%)	Technical (printing, scanning, computing, etc.)
<b>6 =</b>	188	(8%)	Directional/General Info (USF)
<b>7 =</b>	102	(4%)	I need Article X
<b>8 =</b>	18	(1%)	I need to cite Book/Article X

Here, we can see that the questions we consider basic (bars 1, 2, 6, and 7) make up a large portion of questions asked at the desk, but the advanced category (mostly represented by bar 3) is not insignificant.

DeskTracker also allows us to break down the number and type of questions asked by hour of the day, which is one of the main things we base our staffing patterns on. The following graph shows the same categories as the previous graph, but it is broken down by hour. Generally, circulation staff are at the desk at all times the

library is open, but reference librarians staff 11:00-6:00 Monday through Thursday and 11:00-4:00 on Fridays.



total responses for Purpose of Library Services Desk Contact: 2324

	Directional/General Info (Library)
	Directional/General Info (USF)
	I need Book X
	I need Article X
	I need books/articles/info on Topic X
	I need to cite Book/Article X
	Technical (printing, scanning, computing, etc.)
	Other

The first four items on the key (Directional/General Info for the Library or USF and known item requests) represent basic reference questions, which, per the training committee's guidelines, should be answerable by anyone working at the desk. These types of questions make up the majority of our traffic at all times. The questions that

are most easily categorized as advanced (I need books/articles/info on Topic X) generally see a big increase at 11AM and drop down at around 6PM, which indicates our staffing patterns have been appropriate.

One comment that came up on the feedback survey from the desk staff was the request for reference librarians to work at the desk for longer hours, such as 9-6 or 9-7. At this time, the data does not support such a change, but it is worth noting that our DeskTracker data may be flawed. Since this was the first time many Library Service Desk members had used DeskTracker, we found that it was largely ignored or forgotten for the first month or so, which may have lead to some of our numbers being underreported. We encourage everyone that works at the desk to fill out the DeskTracker form whenever possible specifically so that we have accurate data to inform our staffing patterns at the desk.

The raw numbers from DeskTracker can be found in Appendix A. Additionally, anyone that can log into DeskTracker can run their own reports and will have access to all the data included here.

## Comment Cards

Comment cards were placed at several locations around the Library Services Desk on May 14, 2012. These cards consist of a demographics question, six yes-or-no questions, and space to write comments. An identical survey was posted on SurveyMonkey and the link to this survey was sent in the automatic receipt from all circulation transactions. So far, we have gotten 78 comment cards. The results were:

DEMOGRAPHIC GROUP	RESPONSE
Undergraduate student	49.3%
Graduate Student (including Post Docs)	20.5%
Faculty	11.0%
Staff	5.5%
Community Member	4.1%
Other (see comments)	9.6%

QUESTION	YES	NO	SKIP
Did you find what you came for?	92.3%	7.7%	0
Did you get help if you asked for it?	94.7%	5.3%	2
Did the answer satisfy your question?	94.7%	5.3%	3
Was the wait-time before service acceptable?	96.1%	3.9%	2
Was the staff courteous?	98.7%	1.3%	0
Was the staff knowledgeable?	96.1%	3.9%	1

Overall, this is very encouraging data. Of the 78 responses, 40 included additional comments. These comments can be read in their entirety in Appendix B. Generally,

they are a mixture of praise for specific desk workers and general thanks for our library services.

One caveat to any survey like this is that the responding group is self-selecting, and they tend to be those with either exceptionally good or exceptionally bad experiences at the new desk. With this in mind, the three areas that could stand to improve a little more are the first three questions. In regards to question one, there will always be people that want materials we simply don't have, but questions two and three indicate they are leaving unsatisfied in some cases even though they think our staff is prompt, courteous, and knowledgeable. We must attempt to give a thorough answer and actively help patrons when they request it.

## **Library Services Desk Implementation Feedback Survey**

In the last week of July 2012, a survey was sent to all the staff, librarians, and GURUs that work at the Library Services Desk. The purpose of this survey was to gather feedback on the Implementation Team's work and see how we are all adjusting to the new desk. All responses were open ended, and can be read in their entirety in Appendix C.

Of the 26 people that received the survey, 20 completed it. Generally, respondents did feel prepared for the shift to the Library Services Desk. The Implementation Team put together three meetings for all the staff and librarians that would be on the new desk; the first two were run by a member of USF's Organizational Development office and involved a personality test. The opinions of these two sessions were mixed, but many agreed that it was useful to talk about each other's stress management and personality styles. The last session was run by the Implementation Team itself, and consisted of a fun "Getting to Know You" exercise as well as brainstorming groups. The responses to this session were also mixed; most of those that found it helpful commented that they appreciated the opportunity to get to know the people they would soon be working side-by-side with.

Most respondents also found the training adequate, although there were a couple of requests for longer hands-on training for circulation functions and article databases. A suggestion was also made that the training should include more exercises on how to handle difficult situations.

The comments on the setup of the physical desk were almost unanimously in favor of changing to a desk that has a lower section for reference transactions. Thirteen of the 19 responses specifically mention that the "Research Help" portion of the desk is too high and should be lowered. Many commented that this would also serve the purpose of visually differentiating the reference and circulation areas, which could allow us to help patrons more efficiently. Other than that, as one commenter put it, "It's set up as well as it could be without actually changing the desk itself."



Staffing patterns seem to be acceptable to most, although there were a few requests for reference librarians to spend more hours at the desk (see discussion of this topic above with the DeskTracker data). Many also commented that the true test of our staffing patterns will be in the fall semester, and that line management (i.e. making sure students get sent to the right station in a timely fashion) is of utmost importance. Many are also concerned about the lack of referrals, which would indicate that people might be answering reference questions they are unqualified for and giving incorrect information or that reference librarians are spending too much time doing basic circulation functions. It is also important to remember that not everything has to be referred; everyone at the desk is expected to be able to help with basic reference. Again, line management will be a priority during fall.

Almost all respondents agree that having both services offered at one desk is beneficial for students and reduces shuffle. Many feel it is much simpler to refer now, and they have the added bonus of knowing each other better so the referrals are more accurate.

## **Conclusions**

From the results of these data, it is apparent that things are overall going very well. There are a few areas we can improve upon, but a change of this magnitude was expected to have small setback along the way. After reviewing all the data, these appear to be the things we are doing very well already:

- Becoming comfortable working with new coworkers
- Customer service
- Communicating about issues at the desk

These are the areas that we will have to watch closely in the fall, as they appear to be the areas most people are apprehensive about:

- Line management
- Staffing patterns
- Referrals

One recommendation that will go a long way toward fixing some of our minor issues is having a weekly or biweekly meeting that all Library Services Desk members attend. Currently, the reference librarians discuss issues at their meetings, the GURUs discuss things at a separate meeting, and circulation staff has their own meeting. Since communication is such an important issue in this transition process, it would be in everyone's best interest to consolidate these meetings.