January 13, 2012

A Report by the RR2 Taskforce

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Re-envisioning Reference Services at the USF Tampa Campus Library

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Executive Summary

During Fall 2011, the Re-envisioning Reference 2 Taskforce was charged with planning for the next step in the transformation of and improvement to the delivery of reference service at the USF Tampa Library. The literature and USF Tampa Library's own reference desk statistics show a gradual decrease in traffic at the reference desk over the last few years. In addition to a decrease in traffic, many of the questions received at the reference desk are basic. This decrease in traffic, combined with increasing demands on librarians' time in liaison, instruction, administrative, and research duties, led us to the recommendation for a one desk model.

Summary of Recommendations

For a full list of our recommendations, please see the "Recommendations" section on page 15 of this report.

- Merge circulation and reference desks by May 2012 into a single desk that will be called the "Library Services" desk.
- Form three new committees that will represent training, peer to peer learning, and the implementation team.
- The Peer-to-Peer Learning Committee will plan for the use of undergraduates in reference services and handle recruitment efforts for a pilot project in Fall 2012.
- Offer basic reference services at the Library Services Desk, with front line desk staff referring questions to librarians as needed
- Librarians will handle referrals in LIB125B or at the Library Services Desk during certain office hours (TBD); referrals at other times may be handled by email or by appointment.
- A Library Service Desk supervisor will help manage the queue by expediting returns and reference questions.
- All Access Services and Academic Resources staff and faculty will be cross-trained for a list of core competencies in both circulation and reference.

Introduction & Background

During Fall 2011, the Re-envisioning Reference Taskforce was charged with planning for the next step in the transformation of and improvement to the delivery of reference service at the USF Tampa Library. The vision for the new model of reference was to include a transition to a one desk service point, development of a consultation service office and development of a peer assistance model employing students.

Reference service at the Tampa Library has changed substantially in recent years, both in terms of the types of questions received and the manner of receiving them, a trend that is occurring at most research libraries. In response to these trends, some academic libraries have eliminated their reference desks altogether, opting for virtual solutions, while others have moved to a consolidated, or "one desk" service model. For the purposes of this report, "one desk" is defined as a single service point where most patron transactions, including circulation, reserves and reference service take place. Reference service at the USF library is currently provided by a reference desk that is staffed primarily by librarians. Virtual reference service is also available locally and through membership in a virtual reference consortium, which extends service hours to cover late nights, early mornings and weekends.

Beginning August 2010, public service desks at the Tampa Library installed DeskTracker©, as an instrument for collecting statistics. Through examination of the data, it was determined that 90% of the questions asked at the reference desk were basic questions, which could be answered by a trained student or staff member, rather than a librarian. At the same time, librarians were being asked to spend more time engaging in liaison activities, instruction, research and administrative duties. These factors led to the recommendation that the concept of a one desk model be explored.

This report is the result of a semester-long project to review the literature on one desk models, interview librarians at other universities that use these models, and make recommendations for the future of USF Tampa Library reference services.

Literature Review

One Desk Models

Within the literature, there are several models for an integrated service desk, also known as "one desk models." Most of these models are described with different staffing profiles.

An "integrated model" involves reference librarians co-staffing the desk with staff during busy hours (Crane & Pavy, 2008). This model involves cross-training both groups to handle the core competencies of basic reference service and circulation duties. This model appears most frequently at smaller institutions that may not have enough staff to cover separate service points, or at libraries that serve small focused populations.

The "on call model" often involves a pager or other on call system for referring patrons to librarians during slower periods and appointment-based referrals (Flanagan & Horowitz, 2000). This model has staff and students handling all desk operations with librarians available on call during a significant number of operating hours (Sonntag & Palsson, 2007). This model involves significant training to enable students and staff to handle most basic reference questions while librarians are called for more advanced reference assistance. The on call model gives the librarians more flexibility in their schedules to focus on research, consultations, and instruction.

The last prevalent model is one of providing two service points at one desk (Powell, Bryan, Michelson-Thiery, Koltay, & Patterson, 2007). Student workers or staff members handle circulation functions at one area of the desk, and reference librarians handle research consultations in another area. This model allows for consolidation of the service point while keeping the services separate. However, this model does include cross-training to enable circulation to address some basic reference that does not need to be referred to a librarian (Powell et al., 2007). This model can be seen as an intermediate point between the previous two models, in that it does not remove reference librarians from the desk, but would still allow greater schedule flexibility than staffing a traditional reference desk.

The literature has significant emphasis on cross-training and collaboration regardless of the model selected. This key component helped to make the transition to a new model of reference service successful.

Organizational Culture

Several of the interviewed librarians from other universities expressed the idea that the biggest concern prior to creating a single desk was the integration of the distinct cultures of the librarians and the access services staff (see interview notes below). While this may have turned out to be less of an issue viewed in retrospect, it was still something that the libraries had to address.

Unfortunately, almost nothing in the librarianship literature speaks to organizational culture issues, at least not related to merging two different ones. No doubt the issue has been addressed more generally in sociological, psychological, and business literature. In regards specifically to libraries, academic librarian Roxanne Selberg of Northwestern University Libraries discussed the issue in the January/February 2009 issue of *Technicalites*.

Selberg points out that individuals in newly formed merged groups may feel "surrounded" by those from the other original group. If these negative feelings are not sufficiently well addressed, the reorganization may fail. Selberg goes on to suggest three areas to work on in order to confront these organizational culture issues. First, there needs to be recognition on the part of all individuals that different units have different cultures. Second, the merged units need to bring their initial assumptions to the table and then work out solutions if the values from the two groups compete with each other. The leaders of the merged units need to be careful that no one group's original set of values appears to is always "winning." Finally, the senior management must use their ability to shape the organization's culture and to point out what values are shared by the entire organization. This is where a clear statement of mission and vision is important (Selberg, 2009).

Referrals

In any effective model of reference services for the USF Tampa Library, there needs to be a way to refer and track complex questions from the front line to more experienced Academic Services librarians and staff, to librarians and staff in other Library departments, and to units outside the Library. In the previous "Re-Envisioning Reference Report", it was recommended that the USF Tampa Library "institute a robust referral system to document referrals and to follow them up." However, this process has been put on hold awaiting an upgrade to the existing Desk Tracker/Knowledge Tracker software.

While the "Training" section of this document will address the training of front-line staff to know when to attempt to answer a question and when to refer that question to someone else, this section will discuss in more detail the nature of identifying when a question needs to be referred and what systems must be in place to ensure that the question reaches the most appropriate person and is handled to the patron's satisfaction. We will begin with a review of the recent (2000 and later) library literature on the topic of referrals.

At Oberlin College (Mitchell, Comer, Starkey, & Francis, 2011), which uses students on their service desk, the library uses a Blackboard community for all research desk staff (not unlike the wiki currently used by Academic Services), and as a way to post shift reports detailing questions and answers from the shift. Librarians then read the reports and give feedback on the answers (including suggestions regarding resources and search strategies), and communicate directly with the patron if needed. The material documented in the Blackboard community provides content for revision of student training.

Feldman (2009) conducted a literature review regarding referral models. This review focused primarily on the tiered models in place at Brandeis and Lehigh, although these models were put into place during the 1990s before current technology solutions were available. Feldman reported that Colorado State had designed its own database system to track reference transactions.

Kimmel-Smith (2006) reported on the Lehigh experience over the previous 10 years. One issue facing their referral system was that the subject specialist librarian was unavailable at the time of the referral, often already busy with direct outreach activities to their assigned patrons. Kimmel-Smith also reported problems with a lack of willingness by some staff to accept referrals, although this was not the case with librarians. It should be noted that the Lehigh help desk combined questions from both the library and IT categories. Because of the librarians' outreach activities, patrons request librarians by name and make heavy use of consultations (both by appointment and by walk-in). Kimmel-Smith recommends that implementation of a tiered model pay special attention to the timeliness of transactions, increasing training of first-level staff if needed.

In summary (for the purpose of a literature review), it appears that little has been written on the subject of tracking the referral of reference questions from front-line staff to subject specialist librarians (and to others).

From a technical standpoint, the USF Tampa Library has access (actually or potentially) to three different systems for tracking research-question transactions: Compendium's Desk Tracker/Knowledge Tracker, ServiceNow (which will replace RightNow as of the 2012 Fall Semester), and Campus Management's Talisma (which may replace the existing system used by USF Admissions as of August 2012).

The USF Tampa Library already uses Knowledge Tracker for other purposes, and the Compendium products have known fixed annual costs. The USF Tampa Library will need to move its existing RightNow usage to another system. ServiceNow will cost $360/year for each Library agent, while Talisma's cost for the Library (if Talisma is adopted by USF) is currently unknown. A drawback to Knowledge Tracker is that it would be difficult to refer questions to units outside of the Library. USF IT will be using ServiceNow, and the Library does have a need to refer questions to IT. At the same time, some other USF units will be using Talisma (or its equivalent), and these units may be ones with which the Library would like to collaborate more closely in the future, especially in regards to tracking communications with potential students, current students, faculty, and alumni.

In the short term (December 2011 through January 2012), the Library should identify the costs associated with using Talisma as a question tracking system, then compare the three available systems regarding their pros and cons. It is not outside the realm of possibility that the Library will want to use all three systems (if costs permit), but there are obviously drawbacks (other than cost) to requiring staff to learn how to use three different systems.

Training

For many libraries the use of non-librarian staff to provide reference service has been the norm, while for other libraries, staffing the reference desk with non-librarians is a new concept. Dinkins and Ryan (Dinkins & Ryan, 2010)note that "Our goal is not to make a librarian out of the paraprofessional , but rather to let him handle the many transactions that did not require a skill set that the librarian possesses" (p. 285). In reviewing the literature on training staff to provide reference service, there are three common threads.

Identifying the needed skills
The first step for libraries that are planning to train staff to provide reference service is to identify the skills that staff must possess (Pedzich, 2000) This can be done through analyzing the types of questions staff will be required to answer. In those libraries where non-librarian staff members provide reference service, the types of questions fall into four categories.

1. Directional
2. Policy related
3. Referral
4. Basic reference questions

Within the category of basic reference questions, those inquires tend to be limited to searching for known items (e.g. a specific book, journal article, journal title, call number lookups) or involved finding information on the library website (e.g. databases, policies, forms, etc).

Establishing core competencies
To ensure quality, it is imperative to establish the minimum skills, or core competencies, required to provide reference service. Murphy (2008)recommended ten competencies required to provide reference service. Stanfield and Palmer (2010) conducted a survey of academic librarians in an effort to develop a set of competencies. Pedzich suggested that there are two types of skills needed by staff to provide reference service, "knowledge based skills and communications/behavior based skills". Knowledge based skills include being familiar with what is contained in the various library collections, understanding formats, and familiarity with the university and library personnel, policies and procedures. Examples of behavioral skills include the ability to articulate a response, offer direction, instruct in use, as well as listening skills.

Adapted from competencies identified by Murphy (2008), Pedzich (2000), and Stanfield & Palmer (2010), the following is a core list of competencies recommended for staff and student training programs.

- Understanding of the reference interview
- Familiarity with the contents of various collections within the library
- Familiarity with and ability to navigate the library website
- Effective use of the library catalog at a basic level
- Basic familiarity with databases – understanding the general databases and commonly used databases in the disciplines
- Knowledge of the policies, procedures, and personnel in the library
- Familiarity with the referral process

Create a training program
An effective training program should be based on the needed skills and core competencies. Suggested training components include:

- Philosophy and policies, including the reference roles of various staff members (subject specialists) and clear guidelines as to what types of questions the staff member is to answer vs. refer.
- Physical space, collection layout, contents of various collections (e.g. reference, ready reference)
- Reference interview training
- Basic research skills – exposure to the fundamentals may be useful even if staff does not engage in advanced reference.
- Identifying advanced reference and research questions
- Etiquette and privacy issues
- Patrons - who they are , what they do, what are their expectations
- FAQs and tricks of the trade
- Referral: the who, what, when, where, and why
- Scenario training – presenting staff and students with "real life" situations

Womack and Rupp-Serrano (2000) recommend a variety of training techniques, including on-the-job training, individual instruction, group orientations, written materials such as worksheets/workbooks, observation, and role playing. In addition, McDermott (2001) suggested using online tutorials to supplement face to face training. Online tutorials may be either created in house or supplied by another library or vendor.

Ongoing, continuous training is essential to make staff feel comfortable and capable as job roles and responsibilities change (Murphy et al., 2008). Most institutions that used library staff to provide reference service held formal annual training sessions for staff plus periodic updates, and in some cases monthly or weekly meetings. Two way communications between staff and librarians is critical. This can happen formally in meetings or informally. Throughout the literature on staff training, most authors stressed the importance of creating a training and service manual, either in print or online. The manual should contain information about schedules, policies, procedures, etc. Staff can refer to the manual for answers when librarians are not present.

Evaluation of a training program should include assessment of the training process, as well as its effect on the performance of the student trainee. Kathman and Kathman note that "it is important to build in a feedback mechanism so training can be continually improved" (Kathman, J.M. & Kathman, M.D., 2000). To achieve this, evaluation of the training program should encompass a variety of assessment methods, including surveys, informal quizzes/tests, diaries, and observation.

Peer-to-peer Teaching

There is a dearth of research on peer-to-peer teaching models using undergraduate students as reference assistants in academic libraries in the United States. However, these models are often used by academics in the STEM fields and are common in tutoring centers on college campuses. Peer-to-peer models, or methods of learning, originate from the practice of peer-assisted learning or PAL. Peer-assisted learning occurs when individuals of a certain rank or stature serve as educators and providers of information to other individuals who are of their same rank or stature. Peer tutors are an example of PAL methods found in post-secondary institutions. Extensive research exists on PAL, most focusing on its benefits to both the peer as educator and the peer as learner. Among college students, peer-assisted learning has also been indicated as a preferred way of learning and taking in information (Gardner, S. & Eng, S., 2005). With this in mind and in large part due to the current financial challenges post-secondary institutions are facing, academic libraries are looking to peer education models to make up for staff shortages, budget constraints, and space restrictions.

A review of the literature has found that PAL methods are being used outside of the United States in academic libraries in countries such as the United Kingdom, Australia, and Ireland (Gardner, S. & Eng, S., 2005; Walton, 2010). In many of these cases student staff are being trained to teach, convey important information to students, and educate students on how to use library resources. For instance, at Bournemouth University in the UK, a PAL program was created to enhance the experience of first-year students. In collaboration with the library, PAL leaders are trained to educate students on information literacy and referencing.

The literature indicates that this view of training students to educate other students in American college libraries may be gaining some ground. Examples of peer education programs can be found at institutions such as Grand Valley State University, Rutgers, and the University of Connecticut. For example, at Grand Valley State University a one desk service model has been implemented where student staff have been trained to answer the most frequently asked questions with the more in depth reference questions being referred to on call librarians (Garrison, 2011). The Peer Information Counseling Program (PIC) at Rutgers University also uses undergraduate students as peer educators in the reference process. In this model, students at the sophomore and junior level are hired and trained to teach their peers how to conduct database searches, use the library catalog, and search for books in print and online. A similar peer-to-peer training model called the Scopus Student Ambassador (SAm) Program has also been implemented at the University of Connecticut where graduate students are trained to work with and teach their peers on how to use research and citation tools. SAm enables graduate students to facilitate group information sessions to other graduate students that focus on conducting research using both Scopus and Web of Science databases.

Although some evidence does exist on the various uses for peer-to-peer teaching models within academic libraries, more specifically within the function of reference services, little research exists on the success of these models. However, in an effort to shed some light into this unexplored territory Stanfield and Palmer (2010) conducted a study focusing on the benefits of training student staff to perform reference desk duties.

This study is of particular value to library staff in academic settings because it provides insight into the attitudes and opinions of librarians on training student staff to perform basic reference desk functions. The most significant benefit to hiring and training student assistants to work at the reference desk is how this frees up professional librarians to conduct other activities such as instruction collaboration, liaison work, planning, and outreach. Drawbacks to training student staff included funding, turnover, and retention. Finally, as part of their discussion Stanfield and Palmer (2010) conclude that the success of student staff at the reference desk depends on training and they make recommendations based on their findings which include a list of core competencies needed by those students.

In conclusion, a review of the literature shows that student staff members are a valuable resource for academic libraries and that peer-to-peer education opportunities are beneficial to all involved. However, in order for these types of programs to be successful there are several considerations to make note of which include creating extensive training programs, working collaboratively with student staff, and recognizing that student staff should not be hired to replace the work of reference librarians, but to serve as a bridge between library patrons and professional staff.

Assessment

There are a variety of assessment methods available for evaluating reference service. In her article "Assessing Library Services: A Practical Guide for the Non-Expert," Horowitz (2009) provides a literature review with general sources for assessment methods. She outlines the following seven basic tenets of good assessment:

1. Devise a set of performance standards based on the values of your library.
2. Determine what questions you want answered.
3. Make sure to use the most appropriate data-gathering tool for your question.
4. Define plans for data use.
5. Triangulate the data.
6. Endeavor to maintain statistical validity.
7. Pretest data collection instruments.

Horowitz also provides tips for planning, overcoming obstacles, implementing the assessment.

The Reference and User Services Association division of the American Library Association offers planning tips, tools and resources in *Measuring and Assessing Reference Services and Resources: A Guide*. This includes a section on "Evaluation of Reference and User Services" with Five Things to Know About Evaluating User Services:

1. Before you begin a process of service evaluation, be sure to have a clear goal in mind: improvement of services; evaluation of staffing patterns and/or

coverage; providing adequate staff training; discovering underserved populations or areas, etc.

2. Evaluation can be quantitative: statistics gathering, surveys, etc. or qualitative: open-ended surveys, focus groups, interviews; or a combination of qualitative or quantitative methods.
3. Check with your Institutional Review Board to determine if your assessment project requires human subjects review, informed consent, confidentiality of data, and whether the results can be presented and/or published.
4. Multiple analysis packages exist to help you find patterns in your data: SPSS, atlas.ti, Access, or even Excel, but you don't have to use statistical analysis tools—simple familiarity with statistical analysis may be all you need.
5. Remember: data never tell the whole story! Be prepared to examine your results critically and make sense of them in your context. (http://www.ala.org/ala/mgrps/divs/rusa/sections/rss/rsssection/rsscomm/evaluationofref/evaluationreference.cfm)

Babalhavaeji et al. (2010) from Iran discuss SERVQUAL, LIBQUAL, and the ACRL Standards in Higher Education. The article is based on a Ph.D. dissertation, "Quality assessment of academic library performance using gap analysis model: The case of libraries of Islamic Azad University, Science and Research Branch, Tehran." The authors distill this into a checklist in Table IV in the document, broken down by criteria and subcriteria to target specific aspects of library service for assessment.

Gerlich (2009; 2010) published two articles using the READ Scale (Reference Effort Assessment Data), which classifies reference questions by level of difficulty/effort. One article discusses the READ scale in a more theoretical context, what it is, and how questions are ranked. It assesses quantity of questions and level of effort, but not necessarily the quality of service. The READ Scale helped in determining level and amount of staffing needed at a service point. Over the course of the study, it also helped identify training needs and how diverse people handled categories of questions differently. The 2009 article explains Georgia College and Georgia State University's use of the READ scale to determine staffing levels needed at various times of day. One of the challenges they encountered was determining a mutually agreeable definition for each level of question. To achieve some level of uniformity, they did a pre-test for a few weeks to adjust to the tool and used it to set staffing levels ahead of time, not to assess after the fact. The article does not offer discussion of how their reference desk was currently staffed (levels of staff, whether it's combined with another service point).

In "Why and How to Mystery Shop Your Reference Desk," (Kocevar Weidinger, 2010) the author discusses implementation of a mystery shopper project at Radford University and Longwood University. The purpose was to determine if this method of assessment was operationally feasible, if it resulted in useful data, and if analysis of results would provide useful information for training. They used meta-analysis to compare the data from the two institutions.

Villanova used a multiple-methods approach to examine the quality of service at walk-in service points (Stein, 2008). The two main objectives of the study were: "(1) to examine public service delivery areas to ensure that the services provided effectively met the needs of library patrons in ways that are suitable and accessible to patrons; and (2) to explore whether the physical layout of the public service delivery areas is conducive to providing, in effective and efficient ways, the services that patrons need and desire." (Stein, 2008) The author used nine data collection methods. The study was a massive effort involving 30 people as planners, data collectors and analysts, and it covered a variety of areas, several of which were public service points. Ultimately, they needed persons with statistical experience to analyze data.

Phone Interview Summaries

Four phone interviews were conducted for this project. Libraries were chosen either because they have written essential articles about one desk models (Cornell Engineering Library and MIT Libraries) or because they were close peers of USF that are known to use one desk models (Florida State University Library and Georgia Tech Library). The committee started with a basic list of questions for each interview that were sent in advance, and asked follow up questions as needed. The basic questions were:

1. What is the structure of your (reference) desk? Who works there? What kind of hours do you keep it open? Do you provide a full level of service all hours the desk is open? (I.e., if you have a one desk model, are there times when reference is not available there even if the desk is open for circ purposes?)
2. How do you handle traffic flow around your desk?
3. How do you provide virtual reference services?
4. How do you refer individuals to specific librarians for consultations? Do you use any specific software?
5. If you have students or non-MLS staff working your desk, what kind of training program do you use?
6. How do you assess your desk or training program?
7. With regards to your switch to an integrated library services desk, is there anything you would have done differently?

Jill Powell - Cornell Engineering Library

Although the Cornell Engineering Library has recently moved to being a "bookless branch," Powell wrote a key article about merging service points (Powell et al., 2007) and had many insights to share with us. The committee specifically wanted to look at Cornell because they had used the one desk system for several years. Highlights of the interview include:

- Students worked the front line: a supervisor sat nearby
- After trial and error, Cornell found that keeping one queue worked best (as opposed to separate lines for circulation transactions and reference questions)

- Reference librarians had to be trained to handle basic circulation tasks because they wanted to be more useful at the desk
- No students handled reference; anything more than a basic question was sent to the reference librarian at the desk
- There was no specific method of referral
- The library had no formal methods of assessment
- For training, reference librarians were paired with circulation staff to teach each other
- Librarians found that working at the single service desk helped them connect more with patrons
- Powell said that librarians were very worried, and she wishes they hadn't worried about it so much
- Powell's biggest suggestion was to have someone floating behind the front line to act as a supervisor

Howard Silver – MIT Library
Howard Silver is the head of instruction and reference services for the MIT Library System. All four of their libraries have switched to one desk systems.

- Students at their desk(s) are paired with librarians; students never work alone.
- The desk has one service point, but no reported queue issues; librarians, students, and staff are all willing to jump in and help out.
- Most of their virtual reference is handled via email, and most of it is directed at specific librarians
- Referrals are generally given via business cards and subject guides; no formal system follows up on individuals
- Librarians use a chat service (Yahoo IM) to keep in touch with the desk
- They use a training "framework" that they came up with over the summer of 2011
- Training is focused for specific libraries/tasks
- MIT has no formal assessment yet; they are currently trying to set goals
- Silver suggested focusing on people's roles during transition; it is important to clarify who will do what at the new desk
- Customer service is important.

Ted Chaffin, Karen Southwell, Becca Bichel - Florida State University Library
The layout of the FSU library differs significantly from the USF library. They have two service desks, the Scholar Commons (which serves their graduate population) and the Learning Commons (which is the main desk and handles undergraduate traffic). Chaffin, Southwell, and Bichel are all associated with the Learning Commons desk. FSU Library also has a concierge desk near their door that is somewhat analogous to our Ask Desk here at USF. Their desks handle circulation, reference, and IT help; these questions were generally asked and answered with the main Learning Commons desk in mind.

- The desk is open 24/5, and basic reference help is available at all times the desk is open.
- Librarians are generally on call during non-peak hours (mornings, early evening).
- An A&P employee that holds an MLS is on duty at the desk from midnight-8 AM.
- Everyone at the desk receives training in basic circulation duties, reference, and technology troubleshooting.
- Each librarian does 2-6 hours a week at the desk; there are between 3-5 people staffing the desk at a time (mix of staff, librarians, and students).
- The desk has 2 computer stations for consultations.
- The library places a high importance on customer service and follow-through to minimize "shuffle."
- Patrons move through a single queue.
- The library does not have referral tracking software, just the online research consultation form.
- New students (and others working at the desk) receive at least 4-10 hours of core skills training before they can work there.
- The library uses students to make the desk approachable.
- FSU has a robust training program, which includes monthly meetings to discuss service issues.
- They strongly emphasize the importance of merging cultures of circulation and reference, not just service points; circulation generally wanted to be fast, while reference wanted to be thorough.
- The circulation staff were just as worried about the reference librarians making mistakes as the reference librarians were worried about the circulation staff making mistakes; cannot have too much cross-training or team-building exercises

Karen Glover, Bruce Hensen, Stella Richardson – GA Tech Library
Georgia Tech recently underwent new construction within their library and transitioned to a one desk system in August 2011. Their population is heavy on graduate students as well as science and engineering majors.

- The library is open 24/5, and all main desk functions (basic reference, circulation, copy services) are available at those times.
- Many reference librarians were concerned about losing "their" desk, so a consultation desk was kept as a compromise.
- Most reference questions (anything below a consultation) were handled at the main desk, which was staffed by a mixture of librarians, staff, and students.
- The consultation desk is only open 11-5; librarians handle chat reference while they are at the consultation desk.
- The consultation desk does not have much traffic since they made the switch earlier this year; they will possibly eliminate it in the future and move to a referral/appointment model.

- All main desk staff were cross-trained in core competencies.
- Training for circulation staff, student assistants, and reference librarians were handled separately.
- Training consisted of about 10-12 hours before the semester started
- GA Tech librarians made it clear that the consultation desk sounded good in theory but was awkward in practice; they feel there is no need for it with a robust referral system.

The committee noticed common threads weaving through several of our interviews. A common topic in the interviews was the need for a single queue (as opposed to one for circulation functions and one for reference functions). Several interviewees also mentioned that although librarians and staff were very hesitant and anxious about major desk changes, they felt after the switch had been made that things were being handled well; two actually made comments along the lines of "we shouldn't have worried so much." In contrast, the one thing several interviewees wish they had paid more attention to was the need for a true merge of the cultures between the services being merged. As Howard Silver said in his interview, some desks focus on speed, others on thoroughness. Neither is better, but many commented it was beneficial for all involved to confront these differences head on during the transition.

Recommendations

The comments from the phone interviews, along with our review of the literature and the first Re-envisioning Reference Taskforce Report, have resulted in several recommendations. We have tried to make the recommendations concrete actions that we believe will facilitate the move to a single service desk.

General

- Merge circulation and reference desks into a single desk that will be called the "Library Services" desk.

Committees to be formed in Spring 2012 (please see Appendix A):

- Training Committee – develop training program, including cross-training for existing staff and comprehensive training for new staff/student workers. Deliverables will include list of core competencies, training checklist, training modules for circulation and reference, and an outline of the certification process to work at desk (see "Training" section). This committee will be an ongoing committee, although the work will be much heavier in the beginning leading up to the desk transition.
- Peer to Peer Learning Committee – this committee will continue the work of the RR2 committee and make recommendations about using undergraduate students at the Library Services Desk. Deliverables could include a draft of the job description and hiring/interview guidelines. This committee will be ongoing, and will take over supervision of any students that are employed.

- Implementation Committee – Will come up with a schedule for moving to single desk and handle the transition period. Should work closely with training committee to make sure all desk staff and librarians are cross-trained. Should also lead efforts for cultural shift and team-building exercises. This committee is intended to be a short-term project leading up to the transition to the Library Services Desk.
- We would like for each of the current Academic Services librarians to be on one of these committees as well as librarians and staff from other departments.

Desk Structure

- Move reference service point to the east side of current circulation desk.
- Switch current reference backup office (LIB 125C) with circulation office (LIB 125B).
- Reference service area should be set up for seated transactions, while the rest of the desk stays at its current height.
- Have 2 computers at reference area, 1 in backup office (LIB 125B).
- The reference telephone line will ring to the backup office (LIB 125B).
- Get new signage with the name of the desk (Library Services) as well as a bulleted list of the services provided there.

Traffic Management

- All traffic should flow through ONE main queue.
- Supervisor on duty should manage the queue by expediting returns or reference questions.
- Walk-up (i.e. skipping the queue) reference questions are always welcome.
- Get new stanchions for managing the queue.

Staffing

- One librarian at a time will staff the backup office.
- Students and staff will work the front line at the Library Services Desk.
- Supervisor will be on duty to manage student workers and keep line moving (see "Traffic Management" above).
- Students and circulation staff will be trained using the core competencies (see "Training" section below) to answer basic reference questions so that librarians can handle more advanced/consultation questions.
- Access Services will handle scheduling the front line at the desk, with the understanding that certain hours (TBD) will include a reference librarian in the backup office. A reference librarian will coordinate the schedule for specific hours that will be covered in the backup office, doing chat, or as on call "office hours." For example, the Library Services Desk may have a reference librarian from 11-5, and the reference coordinator will develop a detailed schedule for who will be there each hour.

Training

- Training committee should create a list of "core competencies" for circulation and reference work as well as modules to teach these skills.

- Anyone working on the Library Services Desk should be certified (complete training program) for both circulation and reference competencies.
- A "training checklist" should be used to determine if someone needs extra training on an issue (for example, if they are asked how to answer a basic reference question and they can't, they should get a training refresher).
- There should be regular (biweekly or monthly) meetings to discuss training issues or other service-related issues that come up at the desk.

Referrals

- There should be two types of referrals: one type for daytime hours when reference librarians are available but not at the desk, and another type for after hours/weekends when no librarians are available.
- During daytime hours, librarians will keep office hours (coordinated by an Academic Services librarian) during which the Library Services Desk can refer patrons (probably using a chat service like Google Talk). The librarian should go out and meet the patron when requested.
- After hours, patrons may be referred to a librarian either by business card, consultation request form, or email/phone.
- In the short term (December 2011 through January 2012), the Library should identify the costs associated with going to Talisma as a question tracking system, and then compare the three available systems regarding their pros and cons.

Implementation & Assessment

- Implementation committee will decide on schedules and guide the implementation process with the goal of transitioning to a single desk by May 2012.
- Implementation committee will build assessment into the process by designating what data should be collected (and how) so that it can be assessed later.

Budget for the following (for amounts, please see Appendix C):

- Furniture – The east side of the Circulation Desk will need to be reworked to transform into the Library Services Desk described above.
- One staff position (A&P) to conduct customer service training, manage scheduling, oversee transactions, perform assessment, and supervise traffic at desk (see "Staffing" and "Traffic Management").
- Two student positions to specialize in reference for a pilot peer-to-peer program that will start in Fall 2012
- New signage in the form of large electronic screens for the Library Services Desk, which will include the name of the desk as well as a bulleted list of some of the services provided there.
- Additional stanchions for the queue.

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Appendix A. Proposed Committees: Membership and Duties

Implementation Committee (short term)
Number of members: 8
1 chair (Academic Services)
3 Academic Services librarians
2 Access Services staff
1 Special & Digital Collections member
1 Academic Resources member
Responsibilities:

- Schedule for moving to a "single desk" environment
- Schedule for the transition period
- Work with Organizational Training & Development (ODT) to address cultural issues and prepare staff and librarians for "culture shift"
- Work with training committee to assure all staff and librarians are cross-trained
- Outline duties of each position clearly with the role of each position defined
- Work with Tom and Nancy on changing of the desk configuration
- Public Relations – work with Eileen to develop communication strategy for faculty and students
- List basic assessment criteria from which to develop data collection processes

Training Committee (ongoing)
Number of members: 8
1 Chair (Access Services)
3 Access Services staff
2 Academic Services librarians
1 Academic Resources member
1 Special and Digital Collections member

Responsibilities:

- Develop training program
    - Deliverables include list of core competencies, training checklist, online training modules for circ and reference staff, outline of certification process and certificate program.
    - Training schedule
- Develop assessment process and methods for training only

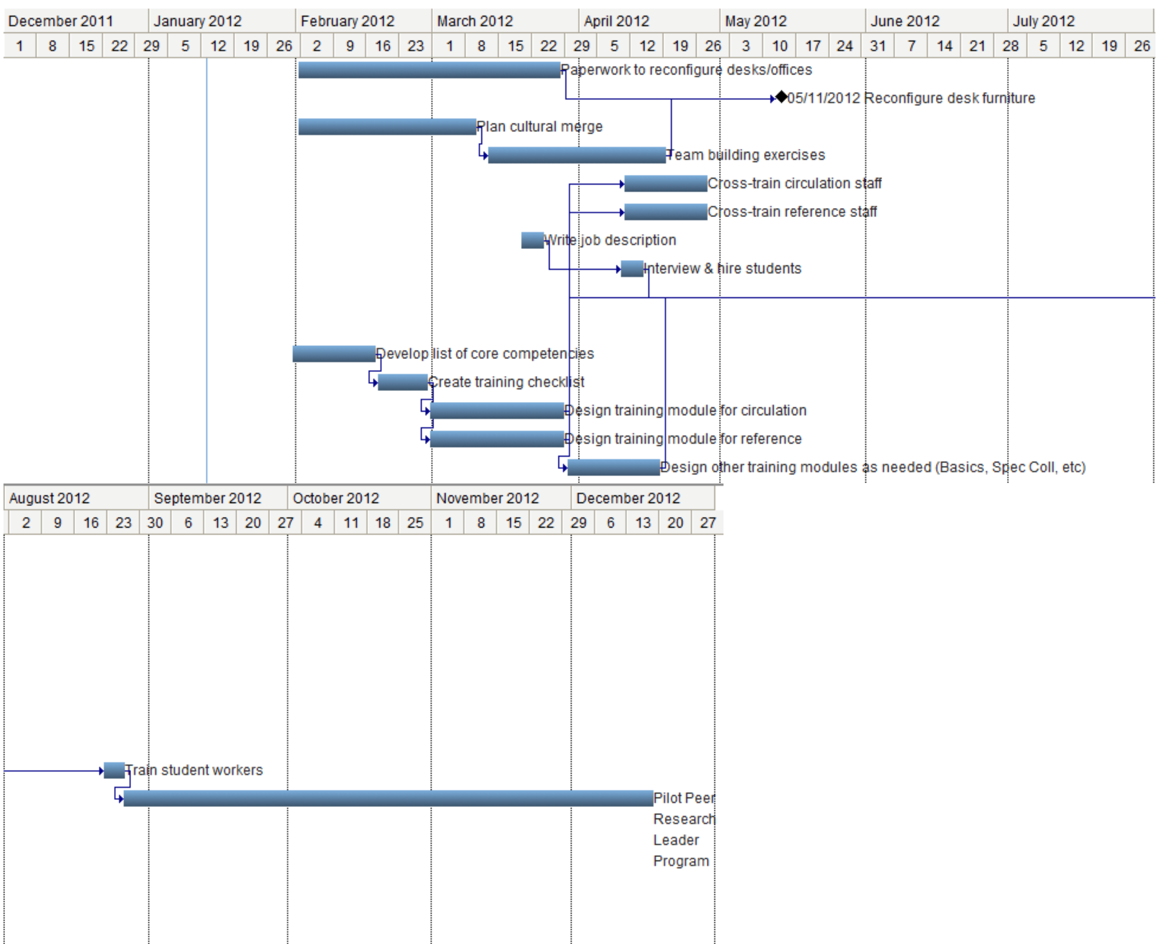
Peer Research Leader Development Committee (ongoing)
Number of members: 5
1 chair (Academic Services)
2 Academic Services librarians
1 Access Services staff
1 Tutoring & Learning Services member

Responsibilities:

- Develop job description for student Peer Research Leaders
- Interview and hiring of students
- Supervising students
- Assessing student performance

Appendix B. Gantt Timeline of Proposed Changes

Name	Start	Finish
Paperwork to reconfigure desks/offices	02/01/2012	03/27/2012
Reconfigure desk furniture	05/07/2012	05/11/2012
Plan cultural merge	02/01/2012	03/09/2012
Team building exercises	03/12/2012	04/18/2012
Cross-train circulation staff	04/09/2012	04/27/2012
Cross-train reference staff	04/09/2012	04/27/2012
Write job description	03/19/2012	03/24/2012
Interview & hire students	04/09/2012	04/14/2012
Train student workers	08/20/2012	08/25/2012
Pilot Peer Research Leader Program	08/25/2012	12/16/2012
Develop list of core competencies	01/30/2012	02/17/2012
Create training checklist	02/17/2012	02/28/2012
Design training module for circulation	02/28/2012	03/28/2012
Design training module for reference	02/28/2012	03/28/2012
Design other training modules as needed (Basics, Spec Coll, etc)	03/28/2012	04/17/2012



Appendix C. Proposed Budget

Please see the “Budget” section under the Recommendations on page 18 of this report for more information.

Furniture	TBD
One staff position (A&P)	$40,000/year
Two student positions (part time)	$6000/semester
New signage (electronic)	TBD
Miscellaneous (stanchions, etc.)	$300