

**Main/Undergraduate Library (UGL) Reference Hub  
ANNUAL REPORT, July 1, 2014 – June 30, 2015**

*Prepared by:*

*Main/UGL Hub Management Team*

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**I. Unit Narrative**

**A. Major Activities and Accomplishments**

One of 3 reference “hubs” created as per the recommendations of the Reference Services Implementation Team Final Report, the Main/Undergraduate Library (UGL) Reference Hub was launched in fall 2012. The Main/UGL Reference Hub is the front line for on-demand reference support, making referrals as appropriate to the Physical Sciences and Engineering Hub based in Grainger, the Life Sciences Hub based in the Funk ACES Library and other units and subject specialists as appropriate. The Main/UGL Reference Hub brings together subject and functional specialists from the Main, Undergraduate and Communications libraries to provide reference and research assistance at two central on-demand information service points: the “Ask-A-Librarian” chat/SMS service and the Information Desk on the second floor of the Main Library.

Specific accomplishments in 2014-2015 include:

- As part of the spring 2015 budget reduction exercises, the Main/UGL Hub Management Team proposed creating 1<sup>st</sup> floor space as primary walk-up research help space by Fall 2016. This proposal (appended below) was strongly supported by the Main Library unit heads and the User Services Leadership Team.
- Streamlined and reduced in-person staffing in response to changing use patterns (see details under section C below)
- Developed training and routines to support more robust referrals:
  - Gathered baseline data on referrals to help monitor future performance.
  - Infused best practices for referrals throughout reference hub training and fall orientation.
  - Worked with the I-Wonder Development Team to develop features that facilitate referrals including tagging incoming chats for generalist/specialist attention and prompting operators to read the questions before picking up a chat.
- Worked with the iWonder development team to develop iWonder 2.0 with features including ability email session transcripts, showing operators when user is typing and vice versa (presence XMPP). department drop-down widget displaying librarian department when chatting and, redesign of message balloon display to make it easier to differentiate between operator and user responses

**B. Challenges**

- A relatively large number of 1<sup>st</sup> year GAs and few 2<sup>nd</sup> year GAs in FY15 meant there was a deficit in experienced people, making it challenging to ensure that there were ample opportunities for over-the-shoulder learning, feedback and mentoring.
- Reduced professional staff in RIS with little-to-no reduction in supervision demands on GAs.

- Emerging reference services (e.g. embedded librarianship) competing for same limited resource pool
- The referral database/contact information is not always clear or up-to-date, leading to a lack of confidence about making the appropriate referral.

### **C. Significant Changes to Unit Operations, Personnel, Service Profile, or Service Programs**

- The Reference Services Committee (RSC) and the Main/UGL Hub Management Team merged into the Reference Management Team, launched in July 2015. This will allow for greater Library-wide coordination and participation in shaping reference services, training programs and ongoing assessment and management activities. Members were drawn from the Hubs and from other specialized reference services, with some continuity in membership from RSC and the Hub Management Team.
  - Research and Information Services and David Ward in the Undergraduate Library will continue to provide on-the-ground coordination and staff support for the operations and management central reference services based in the Main Library.
- Relocated the “Virtual Reference (VR) Desk” to a semi-enclosed space next to the Information Desk (NE corner of 204 Library). The VR Desk is a separate, physical desk with primary responsibility for monitoring chat and SMS questions during the busiest periods which provides an ideal venue for working collaboratively; for mentoring GAs and new staff; and for ensuring that the research-intensive questions received via chat get the focused attention required to ensure the high level of service that has fueled the exceptionally high rate of use enjoyed by our chat service.
  - Half glass panels face the Info Desk, providing clear site lines between the VR and the Info Desk and the location that make it easier to provide mentoring and supervision to both desks and facilitate cross-desk collaboration.
  - The relocation of the VR desk has already allowed slight reductions in staffing levels by allowing us to schedule only one experienced person across both desks during quieter shifts. Without this efficiency, additional librarian hours would have been required to maintain the apprenticeship model that pairs new GAs with experienced staff during their first semester.
  - For next year (2015-2016) staffing efficiencies realized through this collocation are significant. The per-librarian target desk hours were reduced from 2.5 to 2 hours per week and RIS and UGL reduced their GA request for 2015-2016 by a combined .75 FTE.
- Supported the launch of UGL Office Hours and provided the opportunity for all levels of staff to participate in term paper consultations by adding the UGL Office Hours as Hub location.

### **C. Ways In Which The Unit And/Or Its Staff Contributed To Library-Wide Programs**

#### **Information Services:**

- The Main/UGL Hub brings subject expertise into central reference service points, and also strengthens referrals, enhances the overall quality and consistency of service, and serves as a nexus for training and professional development.
- The collaborative approach of the Main/UGL Hub has allowed us to meet rising demand for assistance with high-level research questions via virtual reference services, fluidly shift staff between various modes of service in response to changes in usage patterns and emerging user needs.

## **Assessment**

- Tracked hourly and seasonal patterns of use to help make strategic decisions about hours and mode of service.
- Analyzed reference activity trends by time of day, day of week, and semester in order to fine tune staffing levels across the Hub desks.
- Gathered feedback from all staff through in-person forums and paper and web-based surveys that were analyzed to inform, training topics and approaches.
- A pilot study in spring 2016 gathered baseline data on referrals to help monitor future performance. A random sample of chats were reviewed to look for situations when a referral was warranted. A larger sample will be analyzed to create guidelines for identifying questions that might prompt a referral.
- The findings of study by Jacoby, Ward and Avery of exploring student, instructor, and librarian perceptions of chat reference in the context of an introductory composition course informed the ongoing development of chat best practices and training focused on reference interview techniques, integrating instruction into reference, and referrals

## **Staff Training and Development**

- Expanded the reach of the reference hub training program to help ensure a consistently high level of service, better referrals and a more seamless user experience across the Library system. While the sessions have always been open to all (an invitation going to LibNews and sessions are posted on the staff training calendar), SSHEL GAs started attending the full slate of required sessions in 2014-2015. Next year, fall sessions we also be held in the Grainger Engineering Library to make it easier for their GAs to attend.
- Paired experienced staff with new staff and GAs on the VR Desk and the Information Desk and encouraged collaborative approaches, thus providing rich opportunities for mentoring and over-the-shoulder learning.

## **E. Goals for FY16 and beyond, to be conveyed to the Reference Management Team**

- Advocate for collocating walk-up reference services with consultation services on the 1<sup>st</sup> floor, as per the appended Main/UGL Hub Service Points Discussion, Spring 2015.
- Continue coordinate with Library IT to develop reporting and data storage solutions for iWonder chat software.
- Contribute to the development of stronger referral networks and seek ways to make a more seamless connection between reference interactions and research support service/consultations with other subject specialists and departmental libraries.
  - Work with Library IT to migrate the Referral Database to an IT Production server.
- Continue to evaluate trends in reference activity levels to determine optimal levels of staffing across the Main-UGL hub service points.
- Continue to expand participation in chat across all public service units; advocate for embedding widgets more widely in library webpages, LibGuides, and databases; and advertising in campus sites (course management, student services pages, etc.).
- Support library-wide adoption of READ by providing training in this tool to assess level of question difficulty. The data gathered through READ, although limited by the fact that not all reference service points use the scale, should help us understand the type of reference work happening across the Library to support informed decisions about the type and level of staffing needed at different places and times.

- Continue to improve training through adjustments based on feedback and assessment.

## II. Statistical Profile

### 1. Facilities

#### Number of hours open to the public per week:

VR Desk & Info Desk inclusive hours: M-Th: 8:30am-12am; F: 8:30am-5:30pm; Sa: 11am-6pm; Su: 11am-12am

- Fall 2014 and Spring 2015: 91 hours

### 2. Personnel

Librarians, GAs, and staff from most public service units in the Main and Undergraduate Library participate in cooperative reference services during the fall and spring semesters, based on a target number of hours per librarian or AP in each unit. While the target is based on professional staff, units can elect to have any qualified staff member, librarian or GA participate. During summer sessions, intersessions and breaks, Research and Information Services (RIS) and the Undergraduate Library (UGL) staff these service points with participation from staff in other units on a volunteer only basis.

Support for scheduling and ensuring coverage of all shifts is provided by the Senior Library Specialist (Wendy Gregory) in RIS. Librarians in RIS and UGL work closely with the Hub Management Team on all aspects of management and administration of Main/UGL Reference Hub Services including assessment, setting staffing levels based on activity levels, establishing and maintain service standards, and the administration of crucial infrastructure like chat and Desk Tracker software. Staff Training and Development provides staff support for scheduling the training program.

#### Weekly contributions by units:

<b>Contributions to Info &amp; VR Desk Hours During Fall &amp; Spring Semesters:**</b>			
<b>Percent of Total Desk Hours**</b>			
<b>Unit</b>	<b>2012-2013 (FY13)</b>	<b>2013-2014 (FY14)</b>	<b>2014-2015 (FY15)</b>
Business Information Services	2.4%	0.7%	1%
Communications Library	0.7%	0.7%	1%
Government Information Services	2.4%	0.7%	3%
History, Philosophy & Newspaper	0.8%	1.4%	2%
International & Area Studies	2.5%	4.3%	4%
Literatures, Languages & Linguistics	1.7%	2.1%	2%
Research & Information Services	44.7%	49.5%	40%
Scholarly Commons	n/a	n/a	1%
Social Science, Health & Education	5.9%	5.3%	4%
Office of Services	2.5%	2.8%	2%

Undergraduate Library	36.4%	32.6%	42%
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*\*The statistics are for **fall and spring semesters only**, since those are the times when these service points are staffed by the Hub. RIS & UGL staff these service points during summer sessions, interims, breaks, and reduced service days.*

*\*\*During the first year of operation, unit target hours were tied to GA allocations. Since FY2014 FY2015, target hours have been based on librarian and AP FTEs. Research and Information Services and the Undergraduate Library provided additional hours beyond the required minimum both years.*

### 3. User Services

Reference & Directional Activity, Fall 2014 & Spring 2015**			
	Directional	Reference	Totals
Info Desk	4,500	8,771	13,271
VR Desk	261	6,751	7,012
Totals	4,761	15,522	20,283
Increase/decrease since last year	-8.4%	-14.1%	-12.8%

Mode of Interaction						
	Chat	Phone	In-person	Email	SMS	Uncoded
Info Desk	12.5%	15.0%	66.1%	4.7%	0.1%	1.6%
VR Desk	97.0%	0.2%	1.5%	0.4%	0.1%	0.8%

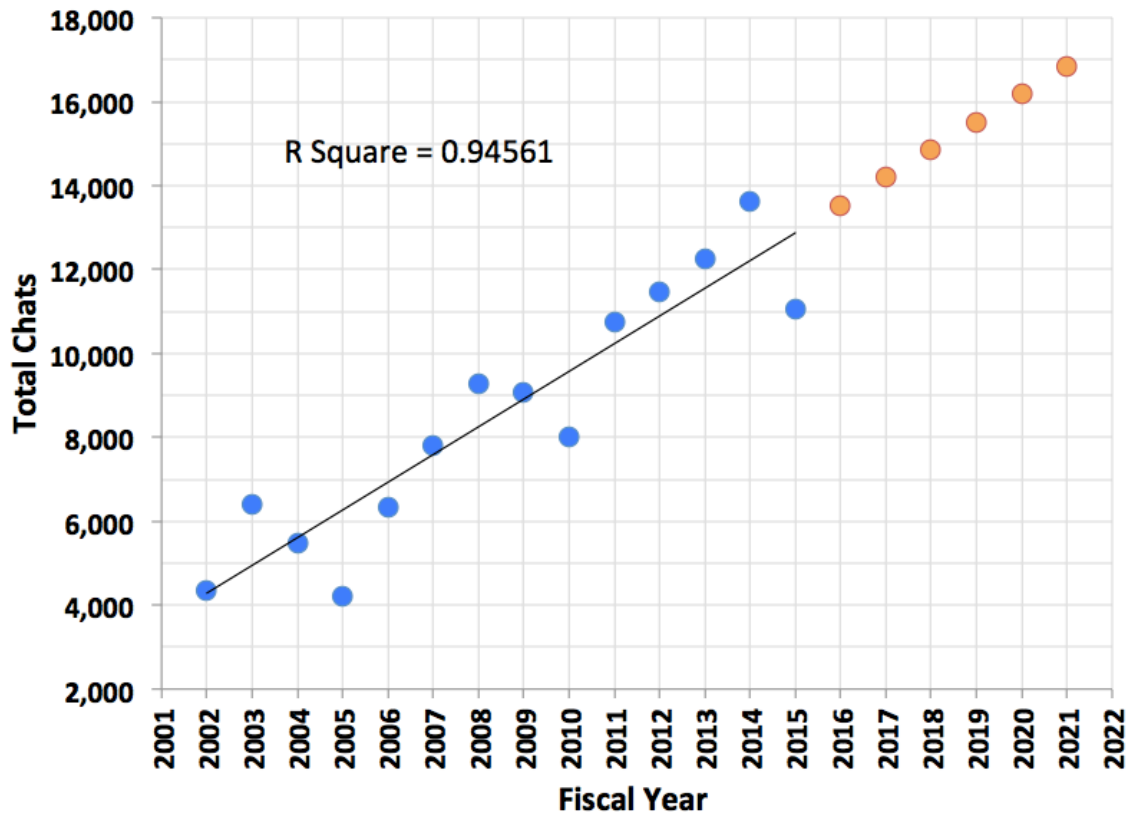
There was a decrease in both directional and reference activity during the fall and spring when staffing is provided by all units in the Hub. However, if you at. summer sessions, interims, breaks, and reduced service days when the service points are staffed by RIS and UGL), there was a less than 1% decrease in activity.

The decline in fall and spring activity is a reversal of recent trends, likely attributable to the growing participation of departmental libraries (including Communications, Funk-ACES, Grainger and Social Sciences, Health and Education) in chat services during the fall and spring semesters and more frequent referrals of chat questions. That is, some traffic that was formerly handled by the VR and Info Desk is now being routed more directly to subject specialists.

Directional questions decreased throughout the year. As noted in the RIS Annual Report, the decrease in directional questions may be due in part to the web redesign which means we can expect further decrease in directional questions as we continue to improve the online user experience. Further Improvements way-finding signage in the Main Library would likely further decrease in directional questions.

#### Future trends

While directional questions will likely continue to decline, chat is likely to continue to be a growth area for the foreseeable future. Sweeps Week data show a 24% decrease and the actual data showed a 19% decrease in chat reference activity across the Library in FY15, but the trend over the past 14 years suggests demand for chat reference may continue to grow albeit less rapidly.



#### 4. Other statistics

##### Training sessions provided for Library staff:

The Main/UGL Hub organized 28 sessions, each offered 2 times every other week in the Fall and Spring semesters, for a total of 56 sessions each year.

- The fall sessions focused building expertise in core areas related to reference & customer service, as well as those subject or topics that generate the most chat reference questions
- The spring session focused on building deeper expertise, including a number of sessions by specialists in specific subject areas.
- The sessions are open to anyone in the Library, and attendees included GAs from Funk-ACES, SSHEL and elsewhere although the bulk of attendees are Main-UGL Reference Hub staff. We hope to make it easier for Grainger GAs to attend next year by offering sessions in their facility.
- 15-35 people attend each session (depending largely on whether it is required or just recommended for experienced Hub staff).

## Appendix 1: Main/UGL Hub Service Points Discussion with Proposed Savings, May 26, 201

Main/UGL Reference Service Hub Management Team (JoAnn Jacoby, Beth Sheehan, David Ward, and Steven Witt)

### Goals

- Provide reference services to match actual use data
- Provide opportunities for pre-professional mentoring (in person and chat)
- Provide flexibility for staff and librarian schedules
- Develop reliable and predictable access to subject specialty

### Constraints

- Reduced budgeting, especially for GAs
- Multiple floors with high foot traffic
- Little-to-no reduction in supervision demands on GAs
- Many ongoing, patron-facing projects heavily reliant on GA hours
- Emerging reference services (e.g. embedded librarianship) competing for same limited resource pool

### Future Service Directions

1. Establish structured tiered-service model
  - Establish 1<sup>st</sup> floor space as primary walk-up research help space by Fall 2016
  - Reduce or eliminate existing 1<sup>st</sup> and 2<sup>nd</sup> floor walk-up staffing, which is 80% READ level 1 or 2 (questions anyone can answer)
    - Work with CAS to perform more referrals for READ level 3+ questions
    - Reopen discussions of Humanities Hub on 2<sup>nd</sup> floor, including 200 Reading Room and/or investigate models for Room 204 as expanded user space, possibly group use space
  - Formalize model of subject specialist access as just-in-time vs. just-in-case staffing
    - Develop model for chat “office hours” so subject specialists can multi-task and still explore options like embedded librarianship
    - Investigate and market appointment-based subject specialist staffing, across Hubs
2. Design a walk-up space which includes easy access to experienced staff
  - a. Establish private consultation space as part of walk-up footprint
    - i. For both generalist reference and calling in available subject specialists in the Main/UGL Hub
  - b. Develop model for day-to-day check-ins to assist new GAs and staff
  - c. Establish office spaces for reference staff adjacent to walk-up service point
  - d. Vacate Room 300 office complex, reassign space to non-patron facing staff

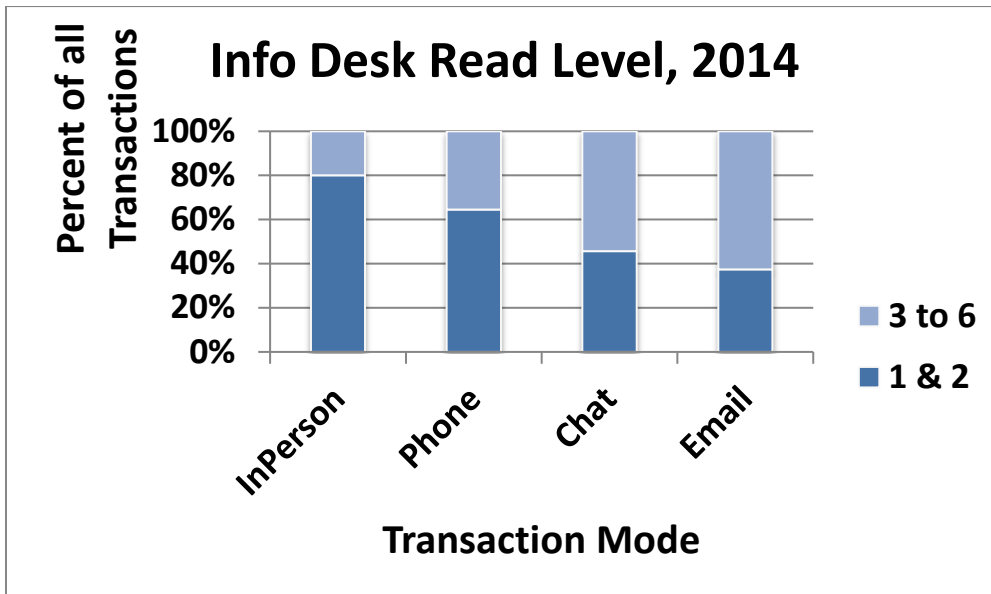
3. Create a pool of shared project hours
  - a. Create an ongoing list of high priority GA project needs
  - b. Assign GAs across Hub service points and divisions to projects
  - c. Monitor progress and completion of projects, provide feedback to assigned GA supervisors on cross-unit collaborations

### **Projected Savings and Efficiencies**

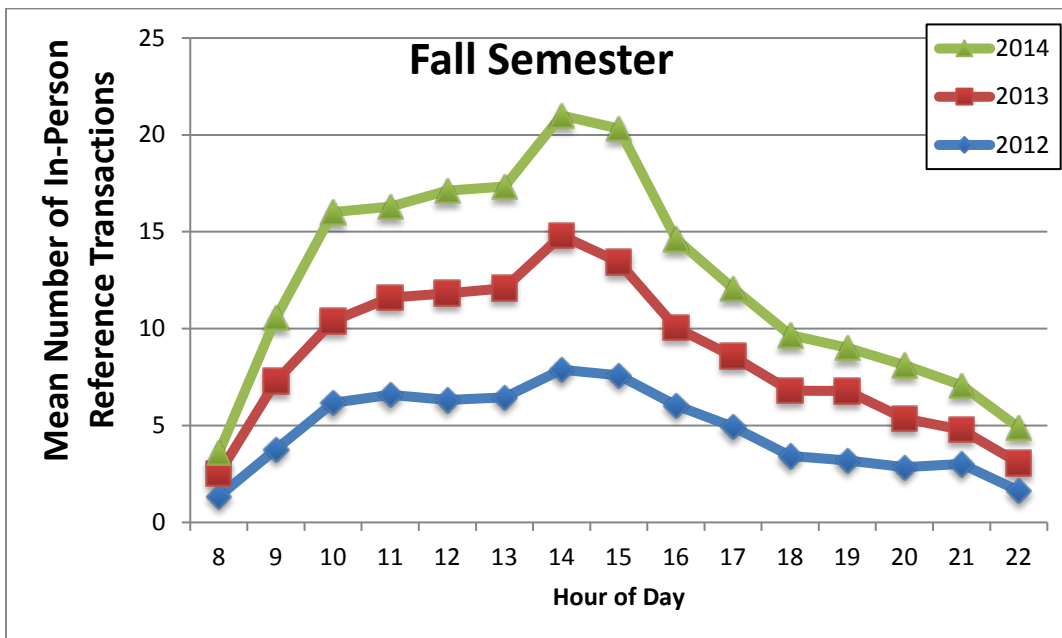
- Reduce the overall hours needed to staff on-demand in-person reference services in the Main Library
  - Hours to be staffed could be reduced by 46 hours across the VR and Info desks based (from 286 hours to approximately 242 hours)
    - If walk-up traffic after 8 pm Mon-Thurs and 7 pm Sunday is referred to SSHEL, where GAs with reference training are scheduled for supervisory shifts in the evenings, then hours can be reduced further, from 286 to 226.
  - SSHEL would consider not staffing their in-person reference desk provided suitable models for handling walk-up requests for in-depth reference assistance can be developed. This would result in fewer weekly desk hours needing to be staffed in SSHEL, in addition to the reductions above for the Hub desks.
    - Starting in Fall 2015, SSHEL will trim their reference desk staffing by 16 hours and did not request grad hourly funds for SSHEL South supervision and will instead assign staff to SSHEL South Sunday-Thursday evenings. To provide additional flexibility, one or two RIS GAs will participate in SSHEL training, work a few hours per week in SSHEL and be available to help cover hours in case of absences or other contingencies
- The initial staffing model will continue to evolve over time and be adjusted in response to changing use patterns
- These efficiencies can be applied in a number of ways. We recommend a combination of the following:
  - Create a pool of shared GA project hours, as described above.
  - Eliminate librarian hours on the in person desk and trim librarian hours to the minimum needed for mentoring, training, oversight and referrals on the VR desk and for on-call research consultation
  - Trim the GA and grad hourly allocation to RIS and SSHEL, but not below the minimum needed to cover peak times for reference, instruction (RIS) supervision (SSHEL) and other core activities



## Selected Data Used for Decision Making



Patterns are similar in SSHEL, with 84% of the transactions being READ level 1-2. Currently, the Information Desk also fields email and phone inquiries, but email could be shifted to the VR desk. Email, like chat, has a high proportion of more complex (READ level 3+) questions, but with complementary time constraints.



80% of these are READ level 1-2 questions that can be handled quickly. The total minutes spent on all in-person averages 30-40 minutes per hours at the busiest times (mid-afternoon) and less than 10 minutes per hour after 8 pm. READ level 3 and above questions could be referred to the librarian on-call during peak times or to the Virtual Reference (VR) desk.