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Summary of recommendations and actions

There are three main parts that comprise the newly envisioned reference services by the University Library:

1. The creation of a new unit, Reference, Research and Scholarly Services (RRSS), which will serve as an internal structure (one that does not present a public face to the University community) and that brings together three existing entities: RRGIS, the Office of Web Technologies and Content Coordination, and the Scholarly Commons. These 3 units will be merged to form the new unit.

2. Reference services will be an enterprise shared by all Library faculty and staff with responsibility for providing reference and information services. The development of a Reference Services Committee will ensure consistent cross-training, assessment, and instruction efforts in order to provide consistent, high-quality reference and referrals across service points.

3. A re-envisioning of the physical reference desks across libraries, inside and outside of the Main Library, will provide reference services across the following three hubs:
   a. A central hub consisting of the Main Library, the Undergraduate Library and the virtual reference desk (referred to as Main/UGL Hub);
   b. Physical Sciences at Grainger Engineering Library;
   c. Life Sciences at the Funk Family ACES Library.

Note: For the time being, specialty reference services (Architecture and Art Library, Map and Geography Library, Music and Performing Arts Library, Rare Book and Manuscript Library, Sousa Archives and Center for American Music, and the University Archives) will continue to provide reference services in their current capacity. They will contribute to the Library-wide coordination of reference services, including contributing to staff training and assessment efforts.

The following are a summary of actions recommended by the Implementation Team:

1. There will be five physical locations that provide in-person reference services:
   a. The Main Library Information Desk will now belong to reference librarians across the disciplines in the Main Library (staffed by central hub personnel rather than being run by RRGIS or the new unit, RRSS);
   b. The Undergraduate Library Information Desk (also staffed by central hub personnel);
   c. The Virtual Reference Services Desk will be located in UGL until a closer location to the Main Library Information Desk can be secured (staffed by all reference personnel);
   d. The Life Sciences service point will be located in the ACES Funk Family Library (staffed by Life Sciences reference personnel);
   e. The Physical Sciences and Engineering service point will be located in Grainger Engineering Library (staffed by Physical Sciences reference personnel);

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1 The Committee considered variations of three different terms for these physical service points: information desk, reference desk, and research desk. Though not unanimous, most favored the use of information desk.
2. Each hub will have a designated manager who will schedule personnel hours, make sure that reference service is consistently provided, and communicate with the Reference Services Committee regarding policy, professional development, and cross-training. The manager will be the contact person for administrative and facilities purposes.
3. A new unit will be formed called Reference, Research and Scholarly Services; a position description was drafted for the new head of the unit.
4. The Team developed a charge and composition of the Reference Services Committee (RSC).
5. The Team recommends that the staffing profile (number and expertise level of staff on a given shift) at all reference desks across the Library should be informed by the amount of and difficulty of questions as measured via the READ scale and Desk Tracker. Each service point will specify a minimum number of scheduled reference service hours that personnel belonging to the service point will provide.
6. Librarians in Reference, Research and Scholarly Services should be trained and available to assist in staffing desks outside of the Main Library in order to facilitate cross-training and provide a consistent level of service across the hubs and specialty desks. The Team strongly encourages librarians outside of Reference, Research and Scholarly Services to also participate in staffing other service points and to participate in the cross-training.
7. The Reference Services Committee will be responsible for developing best practices for reference services, coordinating training plans for the five service points (not including the specialty desks), the communication of levels of services, as well as assessing the success of the staffing and training model.
8. The Implementation Team recommends that all librarians who provide information services directly to users, including subject specialists and generalist reference librarians, participate in providing reference services at their assigned hub as well as virtual reference that is appropriate for their clientele, which may include participation on the Virtual Reference Desk.
9. The Implementation Team developed a basic set of recommendations and requirements for a fully featured and web-accessible referral database to be constructed by (or on behalf of) the Reference Services Committee.

**Background and guiding principles**

Reference interactions across the University Library have changed dramatically in the past decade. The number of in-person interactions have decreased dramatically. At the same time, the number of questions in all subject areas that arrive through digital means has increased substantially and represent an increasingly greater proportion of all reference activity. Increasingly complex questions are being asked, and more specialist librarians are working with their users in consultations (both in the University Library facilities and embedded office hours) and over email. Staffing patterns have changed more slowly. Meanwhile, graduate assistant and student assistant funding has been reduced and retirements and voluntary separations have reduced the numbers of faculty and staff available to provide reference services to our users. In response, several service points have reduced hours while others rely on non-professionals to staff hours when physical libraries are open but no reference service is available. The Reference Services NSM Team undertook the task of developing a robust and sustainable model for
providing reference service across the Library. That model seeks to enhance access to the subject expertise that is available throughout the University Library while increasing our capacity to provide quality reference and instruction service to all library users, whether they engage with the Library’s physical or virtual presence.

From the Planning Team report: One of the key principles guiding the Implementation Team’s work is that reference is a Library-wide priority and a shared enterprise, and, in the best interests of users, operates from a seamless, Library-wide perspective. Any recommendation made by the Implementation Team should incorporate collaborative mechanisms that will ensure such an outcome.

The November 15, 2010 Reference Services NSM Team Report made recommendations in 5 areas:

1. Restructure the University Library’s reference service desks into four physical reference desks and one virtual reference desk to handle basic (tier-1) and mid-level (tier 2) questions. Units currently providing circulation and tier 3 research services will continue to do so.
2. Create a Reference Services Committee with members from units throughout the University Library to address service standards, training, implementation of new technologies and modes of service, search systems, and assessment.
3. Form a unit comprised of librarians, staff and GAs involved in providing basic infrastructure for providing research support across the University Library and made up of members of the current Reference, Research and Government Information Services (RRGIS), Scholarly Commons and Web Technologies and Content Creation units.
4. Define, support and recognize best practices for subject and other specialists engaged in reference consultations and related activities supporting tier-3 reference work that occurs away from a reference desk.
5. Support a successful implementation through ongoing assessment of outcomes and a robust training and cross-training program.

It has been the task of the Reference Services Implementation Team to develop the plan that will see these recommendations come to fruition. Assumptions guiding the work include the following:

1. The team would not review or re-open discussion on directions recommended in the Planning Team report, but would shape the way in which those directions are to be pursued.
2. As noted above, reference service is a Library-wide priority and, in the best interests of users, operates from a seamless, Library-wide perspective.
Definitions

1. Hub – One of three major reference service points in the Library: 1) Main/UGL hub reference services, 2) physical sciences and engineering reference services, 3) and life sciences reference services. Specific library units are grouped within each of these hubs (see pgs. 9-10 for a breakdown of the libraries contributing to each hub).

2. Desk - A physical or virtual service point. The following desks will be associated with the hubs: 1) Main/UGL Hub reference services consists of the Main Library Information Desk, the Undergraduate Library reference desk, and the virtual reference desk; 2) physical sciences and engineering consists of the Grainger reference service point; 3) life sciences consists of the Funk reference service point.

3. Specialty Reference Desks – Specialty Reference Desks consist of the following six units: Architecture and Art Library, Map and Geography Library, Music and Performing Arts Library, Rare Book and Manuscript Library, Sousa Archives and Center for American Music, and the University Archives.

4. READ scale - A six-point scale tool developed for recording the effort, knowledge, and skills utilized by library staff during a reference transaction.

5. Service hours - Service hours are defined as in-person desk shifts, embedded hours, virtual shifts, and consultation/office hours. These hours represent a regular time when patrons who need to locate a subject/other specialist can expect to find the person, in addition to sending questions by email and other asynchronous communications.

6. Reference personnel - Reference personnel includes library faculty, graduate assistants, and staff (including some students) whose job assignments and training includes reference services.

Recommendations

Location of the physical reference desk in the Main Library

The Implementation Team examined possibilities for the physical desk to be located in the Main Library, which is currently located on the second floor of the Main Library and is named the Information Services Desk. The Implementation Team considered four locations on the first floor and two locations on the second floor. The following criteria were used in making a recommendation:

High priority criteria:

1. The desk needs to be easy to find. Directions should be easy to give and the location easy to map.
2. The desk area should have adequate space for conducting side-by-side reference interactions and consultations, and should allow for quick access to nearby public computers.
3. The desk should be in reasonable proximity to support services such as circulation and reserves, scanning stations, and public printers.
4. The desk should be either co-located or in the proximity of other services we are building, such as the Scholarly Commons. Integration of services may be warranted in some cases.

Additional criteria:

A. The desk should be located in reasonable physical proximity to the Virtual Reference Desk, facilitating collegial support.
B. Desk placement should consider the need for quiet space versus the kind of space that can tolerate the background noise that comes with the activity of a public working area.

The Team determined that the second floor Main Library Information Services Desk area is the best option at this time, as it meets criteria 1, 2, 3, and B. Relatively minor, low-cost changes (such as the availability of more spaces between public workstations to facilitate consultation and utilizing the two built-in desks for consultation) could be made to improve those functions. Adjacent office space such as rooms 202 and 203 (currently used for other purposes) might be explored for allied services such as the Scholarly Commons and the virtual reference service (4 and A). Additionally, having the desk on the second floor allows the new reference operation to have an identity that distinguishes it from the specialty services and tier 3 (and up) services (e.g., children's literature collections, curriculum materials, business information, etc.) that exist or are planned on the first floor.

The team notes that there is currently no visible reference presence upon entering the first floor of the Main Library, but that the Library is investing in a digital signage program that will direct patrons to the second floor.

The Implementation Team would like to emphasize that this recommendation should be revisited on a regular basis as services and space allocation in the Library change and develop.

Name for new unit and position description for head

The Reference Services Implementation Team was asked to 1) determine the name for the proposed new unit comprised of librarians, staff and GAs involved in providing basic infrastructure for providing research support across the University Library and made up of members of the current Reference, Research and Government Information Services (RRGIS), Scholarly Commons and Web Technologies and Content Creation units, and; 2) draft a position description for the Head of the new unit. The vision of goals for the unit, adapted and expanded from the Reference Planning Team report are, outlined below.

Name of the Unit:

NOTE (07/06/2011): Per feedback received by the library’s Executive Committee, the name of the unit was amended from “Research and Scholarly Services (RSS)” (original team recommendation) to “Reference, Research, and Scholarly Services (RRSS).”

Unit definition
The new unit will include current members of RRGIS, Scholarly Commons, and faculty in the Office of Web Technologies and Content Coordination. The newly created unit will not be a visible presence to the University community, rather it will be an internal structure in the Library that explores research support services across disciplines and supports a number of public-facing service programs such as the Scholarly Commons, the Savvy Researcher workshops and the Library gateway. The Main Library Information Desk will be not be administered by this unit, but by a designated member of the Main/UGL hub reference staff.

**Reporting lines**

The SC Coordinator will report to the head of the new unit in her capacity as Scholarly Commons Coordinator, but maintain her current reporting lines for other assignments. The Web Content Coordinator will report solely through the new unit.

**Service profile**

- Design, deliver, and coordinate workshops for graduate- and faculty-level researchers that cover general and broad-cutting topics such as information management, GIS, preparing posters, tracking difficult citations, and journal impact factors. These workshops may involve librarians, GAs, and staff from outside of RRSS as teachers and workshop designers.
- Coordinate the services and space of the Scholarly Commons;
- Assist users in data services and other specialized scholar support services;
- Assess and collaborate on the design and maintenance the Library’s gateway and unified web presence;
- Assess and collaborate on the design of next generation research tools (such as Easy Search and VuFind), working collaboratively with groups like IT, CAPT and Grainger;
- Provide research and reference service at appropriate service desks such as the Scholarly Commons and Main Library Information desk;
- Maintain and develop the general reference collection in room 200, Main Stacks Reference, and the Online Reference Collection;
- Provide liaison and instructional services, in person and online, to academic programs that fall outside the lines of defined liaison-service relationships, such as the Graduate College.

**Vision and goals for the Reference, Research and Scholarly Services unit**

The vision of the Reference, Research and Scholarly Services unit is to be a central gateway to the Library’s information and research services and instruction in an academic research environment. The gateway will connect the knowledge that is crucial to developing research competencies through collaborative work with other scholarly support systems in the Library and on campus.

The unit will work in collaboration with subject specialists from across the library to design, test, and implement a variety of services focused on helping faculty and students progress in their research. A particular emphasis of this unit will be investigating the changing nature of reference, and integrating findings from the Scholarly Commons, website usability studies, and other groups across the Library to develop and enhance existing research support services. Vital
to this vision is building strong liaison relationships with faculty from across the library working in similar areas, to engage in discussions about changes to research services and researcher needs.

Short term goals for the unit include:

- Creating an internal administrative structure that supports contributions and incorporation of the work done in each of the three pre-existing units (RRGIS, Web Content and Creation, and the Scholarly Commons)
- Developing strong liaison relationships with other faculty, units and reference hubs doing work in support of reference, research and scholarly services to engage in discussions about changes to research services and researcher needs
- Collaborating on the development and enhancement of existing information discovery and management tools and research support services with the goal of producing tools and approaches that are effective and enticing enough to be adopted throughout the Library

Medium and long-term goals include:

- Further integrating subject specialists into the Scholarly Commons and other service programs so that liaison librarians have the tools and expertise collaborate with faculty and graduate students on scholarly projects
- Evolving toward a model that shifts the emphasis from traditional reference services to research support, characterized by seamless online discovery and strong collaborations and in-depth consultations with faculty and graduate students
- Moving the Scholarly Commons into public service space large enough to support the growing service program and located closer to active service points and spaces where faculty and graduate students engage in scholarly work.

A position description was created for the head of the unit (see Appendix 3). It was revised, as recommended by EC, to be more specific in terms of duties and administrative responsibilities, particularly concerning the relationship of the person to the activities of the various parts of RRSS (Scholarly Commons, Reference, Web Content). The position will be filled at the Associate or Full Professor level. As noted in the description, the vision of the Reference, Research and Scholarly Services unit is to be a central gateway to the Library’s information and research services and instruction in an academic research environment. The gateway will connect the knowledge that is crucial to developing research competencies through collaborative work with other scholarly support systems in the Library and on campus.

**Charge and Composition of Reference Services Committee**

As the primary group for deliberation on Library reference services policies, the Reference Services Committee (RSC) will advise the Associate University Librarian for Services and will consider the following to be within its purview:

1. All issues pertaining to reference, including service standards, training, investigation and implementation of new technologies as well as emerging modes of reference (e.g.,
embedded reference); search systems (e.g., Easy Search, social networking); best practices for referrals; on-going reference professional development; and, library-wide assessment practices.

2. The group will also collaborate with managers of all reference service points in order to disseminate findings of the RSC and adapt them to diverse user groups.

3. Coordinate a common training, assessment, and skills program for core reference services that are shared across all reference service points. Training and professional development for reference in specific disciplines will also be handled by individual reference service points, for example the physical sciences at Grainger. The RSC will work with the Staff Development and Training Coordinator and the Library Assessment Working Group in these areas.

4. Provide consistent training for all reference personnel in implementing the READ Scale, Desk Tracker, and such assessment tools and strategies as may be adopted in the future.


The membership of the Reference Services Committee shall be comprised of one member from each of the hubs including the Central Hub Information Desks (Main Library Information Desk, the Undergraduate Library Information Desk, the Virtual Desk); the Physical Sciences Information Desk; and the Life Sciences Information Desk. One member from a Specialty Reference service point, and two members-at-large who have reference as part of their positions will be appointed. The at-large positions should be filled in such a way as to provide balanced representation from the hubs and specialty desks. No more than two members from any one hub will serve on the committee at the same time. The Staff Training and Development Coordinator will serve as ex officio on the committee. The chair of the committee will be elected from within and function as a rotating position. This person will automatically be placed as an ex officio member of the Services Advisory Committee and will act as a liaison with the Library Assessment Working Group and the Coordinator for Information Literacy Services and Instruction.

**Staffing model**

The charge to the Implementation Team was to develop a detailed staffing model for shared reference services, including virtual and physical service points and other supporting activities, as defined in the Planning Team Report:

a. The supporting activities (i.e., regular hours at a designated physical and/or virtual desk as well as at least one of the following: training reference personnel, advisory services or assessment, and/or design and maintenance of online access and delivery systems) as defined in the Planning Team Report (page 7) should provide a framework for defining expectations for contributing to shared reference and research support services.

b. Ensure that both the physical and virtual reference services are adequately staffed and that the staffing model is flexible enough to adapt to shifts in the proportion of questions coming in through different modes of interaction.

c. Ensure that the staffing model creates opportunities for GAs to have a rich pre-professional experience, form mentoring relationships with librarians, and receive robust training in reference skills as well as subject expertise where appropriate.
d. Suggest a model for cross-training of librarians and training of graduate assistants to enable them to effectively answer Tier 2 questions in the full range of subject areas covered by the reference desks where they will be working.

e. Consider cross-cutting appointments for librarians and graduate students (e.g., RRGIS/UGL librarians with subject liaison responsibilities, new subject specialist hires with explicit responsibilities to contribute to shared reference and research support services).

In response to this charge, the Implementation Team recommends that the level of service at each of the reference service points (Main Library, Undergraduate Library, Virtual, Grainger Library, ACES Funk Family Library) as well as the specialty reference service points (Architecture and Art Library, Map and Geography Library, Music and Performing Arts Library, Rare Book and Manuscript Library, Sousa Archives and Center for American Music, and the University Archives) should be informed by a combination of the level of questions received by aligning the READ Scale with the level of activity at each desk. In order to provide consistent services and coverage for these service points, each of the service points will communicate the level of service available during open hours in order to establish defined service expectations that can be referred to throughout the Library. For example, the Main Library Information Desk may specify that it is staffed to answer READ Scale questions 1-3 during the entire period that the Main Library is open, but that it is staffed to answer READ Scale 4 questions only during specific periods. Staffing is expected to encompass a combination of librarians, staff, and graduate assistants referred to as Reference Personnel. Given the reality that the plan is not resource neutral, reallocation of personnel across units may be needed to fully accomplish these goals, with the caveat that decisions are made within the limits of budget allocations.

While the Implementation Team did not feel able to specify the amount of time that each librarian should spend staffing a service point, we do expect that each service point manager will specify a minimum number of scheduled reference service hours that personnel belonging to the service point will provide. “Service hours” are defined as in-person reference shifts, embedded hours, virtual shifts, and consultation/office hours. These hours represent a regular time when patrons who need to locate a subject/other specialist can expect to find the person, in addition to sending questions by email and other asynchronous communications. For those Reference Personnel working at a service point, it should be understood that a minimum number of hours per week is necessary in order to keep all skills current.

Due to the increasingly busy nature of virtual reference services, a Virtual Reference Desk was created to monitor reference questions via chat and text. This is a service location that is currently housed in the Undergraduate Library. The service point is staffed by librarians, graduate assistants and staff during specified hours each week according to the level of activity at the Main Library Information Desk. The intention of the Virtual Reference Desk is to provide reference personnel with the opportunity to focus on virtual interactions during the busiest hours without having to multitask in-person and phone questions simultaneously. This service point also provides a unique opportunity to mentor and train graduate assistants in providing reference within a collaborative environment in which to answer virtual questions. The Implementation Team recommends that all subject specialists participate in virtual reference that is appropriate for their clientele.
As specified in the Planning Team Report, librarians attached to a service point will also be expected to contribute service hours in-person and virtually, plus one additional reference service contribution:

- Cross-training of personnel who provide in-person or virtual reference hours for this service; or
- Providing advisory services to the administration of this service, including participation in research services advisory discussions, participation in assessment efforts, and overall evaluation and improvement of services provided through Main/UGL Hub Information Services; or
- Design and maintenance of online access and delivery systems to support reference, such as IM Collaborator, Desk Tracker, Easy Search, etc.

The librarians attached to each hub are those in the following libraries:

**Main/UGL Hub (Main, UGL, and Virtual service points)**
- Applied Health Sciences Library
- Business and Economics Library
- Classics Library
- Communications Library
- Education and Social Science Library
- Global Studies Virtual Library
- History, Philosophy, and Newspaper Library
- International and Area Studies Library
- Labor and Industrial Relations Virtual Library
- Literatures and Languages Library
- Library and Information Science Virtual Library
- Reference, Research and Scholarly Services
- Undergraduate Library

**Physical Sciences and Engineering Information Desk**
- Chemistry Library
- Grainger Engineering Library, including Physics and Geology
- Mathematics Library

**Life Sciences Information Desk**
- Funk Family ACES Library, including Biology
- Biotechnology Virtual Library
- Veterinary Medicine Library

The new iteration of the Main Library Information Desk will be staffed by reference librarians from throughout the Main Library building plus Communications, Global Studies, Labor and Industrial Relations, and LIS. In order to assist in staffing levels at hubs outside the Main Library and to provide consistent cross-training opportunities, the Implementation Team recommends that librarians in Reference, Research and Scholarly Services should be trained and available to
staff service points outside of the Main Library. Although aspirational, the Implementation Team strongly encourages librarians outside of Reference, Research and Scholarly Services to also participate in staffing other service points and to participate in cross training.

Two examples are offered as an aid in understanding how the staffing model might look. As a subject specialist attached to the Main/UGL Hub, Sue Searing will continue her embedded services at GSLIS and also serve a defined number of hours on the Virtual Reference Desk. In addition, Sue will be involved in Library-wide reference assessment efforts. As a librarian in the Reference, Research and Scholarly Services department, Kathleen Kern will work a defined number hours per week at the Main Library Information Desk and also plan and deliver cross-training programs to reference personnel Library-wide.

The opportunity provided by the integration of reference and information services across the many disciplines served at each hub reflects the broader approach to rethinking the roles and responsibilities of subject specialist librarians and other Library faculty in light of the changing nature of Library service. Position descriptions for future searches may reflect this broader approach.

In addressing a standard staffing model for a given level of activity, the RSC will develop best practices. The Reference Services Committee will be responsible for advising the managers of each reference service point in coordinating the training plans for the five service points (not including the specialty desks), the communication of levels of services, as well as assessing the success of the staffing and training model.
Referral Model

The team developed a preliminary spreadsheet model as a recommendation for an initial referral list comprised of subject specialists and program liaisons. It was derived from the existing list of collection development responsibilities. An additional, more fully featured and web-accessible referral database should be constructed by the Reference Services Committee. This list will initially be used for internal purposes only. It is not meant to track referrals or reference interactions; we use Desk Tracker for that purpose. In addition to subject expertise, the list should include expertise in software, languages, and formats, as well as knowledge of relevant campus programs and initiatives, such as Ethnography of the University. Everyone listed in the database is expected to accept referrals in their subject/liaison area.

- The group recommends a database structure for referrals that will allow for multiple types of searching and presentation of results
- Search types include:
  - Area of specialty (both subject and software/other expertise)
  - Individual Person
  - Unit/service point (e.g. view all specialties that can be referred to the Scholarly Commons or Grainger)

An area of specialty entry will include the following (as applicable for each area of specialty or liaison responsibility):
- Contact people for that area (including links to profiles described below)
- Units/service points that provide reference for that area
- Phone numbers for both
- Email for both
- Office/Unit location information
- Hours of availability
- Preferred contact method
- Links to relevant subject and course guides

A personal profile entry will include the following (as applicable):
- Name
- Phone
- Email
- Office Location(s)
- Office hours/hours of availability/embedded service hours/etc.
- List of subject/other specialty areas including liaison responsibilities to campus groups
- Preferred method of contact for referrals
- Links to relevant subject and course guides
- These profiles could be linked to the main instance of LibGuides as well
Assessment Plan

The assessment plan was developed in collaboration with members of the Library Assessment Working Group.

Anticipated Outcomes

- Increased referrals
- More cross-training and understanding of multiple disciplines
- Increased ability to work collaboratively on interdisciplinary questions

Timeline

- Management data (e.g., anything recorded as part of a reference transaction) will be recorded beginning Fall semester, August 2011; much of this data is already recorded on an ongoing basis using Desk Tracker.
- Initial surveys, interviews, and similar types of feedback will be collected before the end of Summer term, August 2012.

Data to Collect

An assessment plan for *reference and information services* across the Library should include:

1. Assessment of user satisfaction with services provided
2. Assessment of changes in the mode of service employed by users
3. Assessment of the type, content, and complexity of questions asked through available services
4. Assessment of the conduct of reference and information service interactions (face-to-face and/or digital) for accuracy, adherence to best practices outlined in the literature
5. Assessment of the alignment of available human resources and technology tools with reference and information service needs

An assessment plan for the *Reference New Service Model* should include:

1. Assessment of continuing education needs for faculty, staff, and students providing reference and information service
2. Assessment of satisfaction among participating faculty, staff, and students with continuing education opportunities provided
3. Assessment of the “referral” process
4. Assessment of user satisfaction at individual service points, especially around key concerns such as ability to consult with an expert (when needed), successful referral to an expert (when appropriate), availability of assistance when needed

Method of Assessment

The Reference Services Committee will collect the data from Desk Tracker and analyze it in conjunction with (and the support of) the Library Assessment Working Group. Interview data will analyze how the implementation model has worked for staff, and quantitative data can be compared to pre-implementation statistics. It is recommended that the READ scale be
implemented across major service hubs, and extended to all reference services, to provide a common assessment tool for analyzing difficulty of questions.

Appendix: Current Data Points Available for Collection Through Desk Tracker²

- Number of interactions
- Patron Type
- Staff type
- Length of interaction
- Mode of communication (in person, email, chat, etc.)
- Service Point
- READ scale (degree of difficulty)
- Referrals (Origin and destination points)
- Question description

² Not all service points make use of all available categories; discussion is needed to determine categories needed for comparative assessment.
Implementation Team Members

Frances Harris, Team Leader
Pat Allen
Merinda Hensley
Nancy O’Brien
Sue Searing
Sarah Shreeves
David Ward
Scott Walter, Administrative Liaison
<table>
<thead>
<tr>
<th>Recommendation</th>
<th>Specific Recommendations</th>
<th>Start Date</th>
<th>Completion Date</th>
<th>Who Responsible</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Establish Reference Research and Scholarly Services Unit</strong></td>
<td>Draft initial RRSS service program profile and draft position description for unit head. Appoint Search Committee.</td>
<td>June 2011</td>
<td>June 2011</td>
<td>Executive Committee</td>
</tr>
<tr>
<td></td>
<td>Conduct search for unit head</td>
<td>June 2011</td>
<td>August 2011</td>
<td>Search Committee</td>
</tr>
<tr>
<td></td>
<td>Review of position descriptions for faculty and staff in RRSS component units (RRGIS, etc.) and alignment of responsibilities for faculty and staff based on RRSS service program profile</td>
<td>August 2011 (dependent on start of unit head)</td>
<td>Sept 2011</td>
<td>Unit head with RRSS personnel</td>
</tr>
<tr>
<td><strong>Establish Reference Services Committee</strong></td>
<td>Draft charge based on recommendation from Reference Service Implementation Team and identify membership and appoint Chair</td>
<td>May 2011</td>
<td>June 2011</td>
<td>Executive Committee</td>
</tr>
<tr>
<td><strong>Establish New Reference Staffing and Service Model</strong></td>
<td>Development of core service training plan, e.g., the reference interview, use of available resources, e.g., Reference Rolodex, use of READ Scale, use of digital reference applications. This will include identification of annual training needs, methods of delivery, and content.</td>
<td>August 2011</td>
<td>August 2012</td>
<td>RSC and Staff and Development Training in consultation with hubs</td>
</tr>
<tr>
<td></td>
<td>Development of training plan for reference in specialized areas, e.g., business, government information, humanities, social sciences, physical sciences and engineering, life sciences, health science, music information, art information, digital collections (allowing all desks to provide “basic reference assistance” across all areas). This will include identification of annual training needs, methods of delivery, and content.</td>
<td>August 2011</td>
<td>August 2012</td>
<td>RSC and Staff and Development Training in consultation with hubs</td>
</tr>
<tr>
<td></td>
<td>Development of referral protocols (and related tools, e.g., “experts</td>
<td>August 2011</td>
<td>October 2011</td>
<td>RSC in consultation with IT</td>
</tr>
<tr>
<td>Task</td>
<td>Start Date</td>
<td>End Date</td>
<td>Responsible Party</td>
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<tr>
<td>Establish assessment program</td>
<td>August 2011</td>
<td>December 2011</td>
<td>RSC in consultation with Assessment Committee/Coordinator</td>
<td></td>
</tr>
<tr>
<td>Development of appropriate signage and other documentation</td>
<td>October 2011</td>
<td>December 2011</td>
<td>RSC in consultation with hubs</td>
<td></td>
</tr>
<tr>
<td>Staged implementation of training begins</td>
<td>January 2012</td>
<td>Ongoing</td>
<td>RSC and Staff and Development Training in collaboration with hubs</td>
<td></td>
</tr>
<tr>
<td>Staged implementation of staffing model across hub and specialty desks begins</td>
<td>January 2012</td>
<td>Ongoing</td>
<td>Hubs</td>
<td></td>
</tr>
<tr>
<td>Implementation of staffing model for Virtual Reference Desk begins</td>
<td>January 2012</td>
<td>Ongoing</td>
<td>RRSS in consultation with Hubs</td>
<td></td>
</tr>
<tr>
<td>Implement assessment program</td>
<td>January 2012</td>
<td>Ongoing</td>
<td>RSC in collaboration with Assessment Committee/Coordinator</td>
<td></td>
</tr>
<tr>
<td>Consultation with ESSL, Communications, and HPNL units for hub integration between these three units, the RSC, and RRSS begins</td>
<td>May 2012</td>
<td>August 2012</td>
<td>All units affected coordinated by RSC</td>
<td></td>
</tr>
<tr>
<td>Full implementation of training – basic and specialized - begins</td>
<td>August 2012</td>
<td>Ongoing</td>
<td>RSC and Staff and Development Training in collaboration with hubs</td>
<td></td>
</tr>
<tr>
<td>Full implementation of staffing and training model across hub and specialty desks. ESSL, Communications, and HPNL units begin sharing staffing and training with Main/UGL hub</td>
<td>August 2012</td>
<td>Ongoing</td>
<td>All units affected coordinated by RSC</td>
<td></td>
</tr>
</tbody>
</table>
Appendix 1

Reference Services Implementation Team Charge

The November 15, 2010 Reference Services NSM Team Report made recommendations in 5 areas:

1. Restructure the University Library’s reference service desks into four physical reference desks and one virtual reference desk to handle basic (tier-1) and mid-level (tier 2) questions. Units currently providing circulation and tier 3 research services will continue to do so.

2. Create a Reference Services Committee with members from units throughout the University Library to address service standards, training, implementation of new technologies and modes of service, search systems, and assessment.

3. Form a unit comprised of librarians, staff and GAs involved in providing basic infrastructure for providing research support across the University Library and made up of members of the current Reference, Research and Government Information Services (RRGIS), Scholarly Commons and Web Technologies and Content Creation units.

4. Define, support and recognize best practices for subject and other specialists engaged in reference consultations and related activities supporting tier-3 reference work that occurs away from a reference desk.

5. Support a successful implementation through ongoing assessment of outcomes (see Appendix 4 for a list of considerations) and a robust training and cross-training program.

The Implementation Team was charged to move forward with these recommendations.

Charge

1. Define a process and timeline for transitioning to one virtual and four physical reference desks (Main Library, Undergraduate Library, Physical Sciences [Grainger], and Life Sciences [Funk]), considering the following issues:
   a. Given that the implementation will be staged (Education and Social Science, History, Philosophy, and Newspaper and Communications will not be included in the shared desks until after Fall 2011), how can reference services supporting all disciplines, including virtual reference services which support a steadily increasing proportion of Tier 2 questions, be effectively staffed during the transition period?
   b. How should staffing patterns be changed to sustain circulation and/or Tier 1 service desks in units where librarians will be contributing to shared reference services and related supporting activities?
   c. How can successful reference services in existing units inform the services offered at the consolidated reference desks?

2. Develop a detailed staffing model for shared reference services, including virtual and physical desks and other supporting activities, as defined in the Planning Team Report.
a. The supporting activities (i.e., regular hours at a designated physical and/or virtual desk as well as at least one of the following: training reference personnel, advisory services or assessment, and/or design and maintenance of online access and delivery systems) as defined in the Planning Team Report (page 7) should provide a framework for defining expectations for contributing to shared reference and research support services.

b. Ensure that both the physical and virtual reference services are adequately staffed and that the staffing model is flexible enough to adapt to shifts in the proportion of questions coming in through different modes of interaction.

c. Ensure that the staffing model creates opportunities for GAs to have a rich pre-professional experience, form mentoring relationships with librarians, and receive robust training in reference skills as well as subject expertise where appropriate.

d. Suggest a model for cross-training of librarians and training of graduate assistants to enable them to effectively answer Tier 2 questions in the full range of subject areas covered by the reference desks where they will be working.

e. Consider cross-cutting appointments for librarians and graduate students (e.g., RRGIS/UGL librarians with subject liaison responsibilities, new subject specialist hires with explicit responsibilities to contribute to shared reference and research support services)

3. Define the requirements for creating an online knowledgebase to support a robust referral model that connects users to appropriate specialists with subject, technology, or other relevant expertise throughout the University Library.

4. Determine the name for the proposed new unit comprised of librarians, staff and GAs involved in providing basic infrastructure for providing research support across the University Library and made up of members of the current Reference, Research and Government Information Services (RRGIS), Scholarly Commons and Web Technologies and Content Creation units.

5. Draft a position description for the Head of the new unit.

6. Draft the charge and suggested composition for the Reference Services Committee. The Chair of this group should have an ex officio appointment on the Services Advisory Committee.

7. Determine the data and methods for assessing the new reference service model in consultation with the Library Assessment Working Group.

8. Determine the optimum location of the physical reference desk in the Main Library. The Planning team has formulated several ideas for possible locations and will be passing that information along to the Implementation Team.

A draft report is due to the University Librarian on March 30 and a final report is due April 30.

**Proposed Membership:**

Frances Harris, Team Leader
Pat Allen
Merinda Hensley
Nancy O’Brien
Sue Searing
Sarah Shreeves
David Ward
Scott Walter, Administrative Liaison
Appendix 2
Implementation Team Process

The NSM Reference Implementation Team met as a whole on March 4, March 9, March 28, and April 7. Notes from these meetings can be found on the Reference Team website, http://www.library.illinois.edu/nsm/reference/. A great deal of business was also conducted by email. At the initial meeting on March 4, the Team chose to stage its work by charge. Four subcommittees were formed, as follows:

Nancy O’Brien, Pat Allen, Merinda Hensley
Charge 6 (Draft the charge and suggested composition for the Reference Services Committee)
Charge 5 (Draft a position description for the head of the new unit)

Pat Allen, Merinda Hensley, Sarah Shreeves
Charge 2 (Develop a detailed staffing model for shared reference services)
Charge 1 (Define process and timeline for transition)

David Ward, Sarah Shreeves, Sue Searing
Charge 3 (Define the requirements for creating an online knowledge base to support a robust referral model)

Sue Searing, David Ward, Scott Walter (advisory)
Charge 7 (Determine the data and methods for assessing the new reference service model)

Committee of the Whole
Charge 8 (Determine the optimum location of the physical reference desk in the Main Library)
Charge 4 (Determine the name for the proposed new unit)
Appendix 3  

Head, Reference, Research and Scholarly Services, and Associate Professor or Professor of Library Administration  

University of Illinois at Urbana-Champaign Library  

**Position Available:** Position is open until filled. This is a full-time, twelve-month, tenure-system faculty appointment. Rank at the level of Associate or Full Professor of Library Administration with tenure, depending on the qualifications of the candidate selected. The librarian appointment is permanent, but unit head appointments in the University Library are made for five-year, renewable terms. The successful candidate must meet requirements for tenure at the University of Illinois, which includes expectations for librarianship, research and service. The Reference, Research and Scholarly Services (RRSS) unit is a new unit in the University Library with broad responsibilities for providing research support to an interdisciplinary clientele in collaboration with colleagues across the university library system. Research and Scholarly Services will bring together librarians and services from the Reference, Research, and Government Information Services, Scholarly Commons, and Web Content and Creation units. Further information about the unit is available here: [INSERT URL TO ABOUT PAGE ON RRSS]  

**Duties and Responsibilities:** Reporting to the University Librarian, the Head of Reference, Research and Scholarly Services will provide leadership for, and supervision of, a wide array of information and instructional services provided to Library users. The Reference, Research and Scholarly Services unit will serve as a central gateway to the Library’s information, research, and instructional services in an academic research environment and support a number of public-facing service programs including the Scholarly Commons, the Savvy Researcher workshops and the Library Gateway website. The work of the unit includes collaboration with subject specialists from across the library to design, test, and implement a variety of services focused on helping faculty and students progress in their research. A particular emphasis of this unit will be investigating the changing nature of reference, working collaboratively with other scholarly support systems in the Library and on campus, and integrating findings from the Scholarly Commons, website usability studies, and other groups across the Library to develop and enhance existing reference and research support services.  

The **successful candidate will:**  

- Lead the successful integration of personnel and core activities supporting public services for government information and central reference programs, web content services, and the Scholarly Commons;  

- Oversee operations and establish priorities for core services in the Reference, Research and Scholarly Services unit, including participation in Library-wide reference service, collection development and management, liaison, outreach, instruction, research consultation and support for digital scholarship;  

- Develop strong liaison relationships with other faculty, units and reference services doing work in support of reference, research and scholarly services to engage in discussions about changes to research services and researcher needs and collaborate with other
personnel in the Reference, Research and Scholarly Services, the AUL for Services, the AUL for Information Technology Planning and Policy and the AUL for Collections, in developing programs, services and other activities;

• Coordinate assessment of unit services and make recommendations for any improvements based on that assessment;
• Provide collection development, reference service, and instructional services, using digital, social networking, and other applications;

• Promote and market the unique service profiles developed within this new unit;
• Direct the selection, training, evaluation, and deployment of support staff members in the Reference, Research and Scholarly Services unit;
• Oversee endowment fund and general department budget;
• Evaluate, coach, and mentor personnel;
• Prepare regular and on-demand reports for the Library, including but not limited to strategic plans, annual goals, annual reports, and budget proposals and requests;
• Perform other related duties as assigned.

Qualifications: Required: ALA-accredited Master’s degree or equivalent; Minimum three years of post-MLS professional experience in an academic or research environment; Experience leading and managing in an academic or research environment, particularly in reference services; Experience providing information and research services and instruction in an academic or research environment; Knowledge of emerging trends in academic reference and instructional services as well as the ability to demonstrate and communicate those characteristics in a clear and concise manner; Strong team-leadership skills and ability to work collaboratively; Flexibility and ability to thrive in a complex, changing environment with competing demands; Evidence of research, publication, and service to meet university standards for tenure.

Preferred: Progressively responsible professional experience in academic or research library setting, with a demonstrated commitment to user-centered services; Management and supervisory experience in a research library environment; Demonstrated ability to provide a positive vision for the future of reference services and libraries as a whole; Familiarity with government information or provision of reference from a service point combining general and specialized reference services; Demonstrated knowledge of relevant trends in digital libraries, the social aspects of information, and scholarly communications; Experience in building and sustaining library collections in all formats; Commitment to mentoring and training; Demonstrated excellent communications skills; Experience working cooperatively and effectively with all elements of an academically and culturally diverse community.

Salary and Rank: Salary commensurate with credentials and experience, and will include an administrative component for the three-year renewable appointment as unit head. Rank at the
level of Associate or Full Professor of Library Administration with tenure, depending on the qualifications of the candidate selected. Librarians have faculty rank, and must demonstrate excellence in librarianship, research, publication, and university/professional/community service in order to meet university standards for tenure and promotion.

To Apply: Please complete your candidate profile at https://jobs.illinois.edu/. Upload letter of application and complete resume, including names, addresses, telephone numbers, and email addresses of three (3) references to: Cindy Kelly, Head, Library Human Resources, University of Illinois at Urbana-Champaign, 1408 W. Gregory Drive, Urbana, IL 61801. All requested information must be submitted for your application to be considered. For questions, please call: 217-333-8169.

Deadline: Position is open until filled. Applicant submissions will be reviewed beginning (mm/dd/yyyy). In order to ensure full consideration, applications and nominations must be received by mm/dd/yyyy.

Illinois is an Affirmative Action/Equal Opportunity Employer and welcomes individuals with diverse backgrounds, experiences, and ideas who embrace and value diversity and inclusivity. (www.inclusiveillinois.illinois.edu).

Appendix 4

Proposed language for establishment of Reference Services Committee (RSC)

Reference Services Committee

1. Purpose. As the primary group for deliberation on Library reference services policies, the Reference Services Committee shall advise the Associate University Librarian for Services.
   a. All issues pertaining to reference are considered by the committee. These include service standards, training, investigation and implementation of new technologies as well as emerging modes of reference (e.g., embedded reference); search systems (e.g., Easy Search, social networking); best practices for referrals; on-going reference professional development; and, library-wide assessment practices;
   b. The group will also collaborate with heads of all reference service points in order to disseminate ideas of RSC and adapt them to diverse user groups;
   c. Coordinate a common training, assessment, and skills program for core reference services that are shared across all reference service points. Training for reference in specific disciplines will also be handled by personnel at individual reference service points, for example the physical sciences at Grainger. The RSC will work with the Staff Development and Training Coordinator and the Library Assessment Working Group in these areas;
   d. Conduct assessment of the outcomes of the new reference service model and provide on-going assessment of trends in patrons’ reference needs.

2. Membership. The membership of the Reference Services Committee shall be comprised of:
   a. 3 – single representative from each hub (Main/UGL/Virtual, ACES, Grainger)
   b. 1 – Specialty Reference Services representative
c. 2 – at-large members (selected to provide balanced representation from the hubs and specialty desks)

d. 1 – *ex-officio* member, the Staff Training and Development Librarian

3. Term of Office: Members will be appointed to serve for two-year staggered terms with possible reappointment for an additional term. No more than two members from any one hub will serve on the committee at the same time.

4. Meetings. The Reference Services Committee shall meet monthly or at the call of the Associate University Librarian for Services.

5. Chair. The chair will be a rotating position, elected by the committee and serve a one-year term, with the possibility of reelection for two additional one-year terms. This person will automatically be placed as an *ex officio* member of the Services Advisory Committee.

6. Reporting. Minutes of the Reference Services Committee shall appear on the Library’s website or through other online distribution. The Committee shall communicate and consult at any time and in ways deemed appropriate.