Reference Implementation Forum  
Tuesday, April 26th, 1:30-3:00, 335 Grainger

21 attendees

Frances distributed a handout (“Summary of recommendations and actions”) that briefly glossed the main points of the draft report. She also noted that one of the team’s guiding principles was to not reopen discussion of decisions made by the planning team, but instead to focus on shaping the way those decisions will be implemented. She also reminded everyone that comments were due by May 3, 2011.

Each item in the “Summary” was discussed (and suggested revisions to the summary are indicated in Italics below).

1. The physical desk for the Main Library Hub should initially be located in the space currently occupied in the space currently occupied by the Information Services Desk.
   - Report should clearly specify that this refers to the desk for the Main Library Hub.
   - Was this informed by patron preferences? Was the 1st floor considered? Second floor collocates reference with circulation and public access terminals. Logistical issues made the 1st floor difficult; kiosks and better signage would help support 2nd floor location. These contingencies (signage/kiosks on the first floor) could be more clearly specified in the report.

2. The name of the new unit will be Research and Scholarly Services; a position description was created for the new head.
   - This is not the name of the desk/service point, i.e., this name is for an internal unit and not a public presence.
   - Frances noted that, based on preliminary review, EC suggested that the position description be revised 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 RSS (Scholarly Commons, Reference, Web Content).

3. The team determined a charge and composition of the Reference Services Committee (RSC), but would like input from the faculty.
   - As discussed at the Faculty meeting, should we create a smaller, functionally-based membership or a larger committee with divisional representation? The Faculty meeting discussion suggested that there is more support for the smaller, functional group.
   - The chair will rotate.
   - There was some concern expressed about the challenges of accomplishing such an ambitious agenda with a rotating chair who is doing this work in addition to other duties. This can be challenging, as we’ve seen with assessment and user education. Should we reconsider the Coordinator suggested in an early draft from the Planning team? Or perhaps the Head of Research and Scholarly Services should chair? Should we consider offering a GA and/or stipend for the RSC chair and some sort of review process, as is done with Division Coordinators?
   - A number of people noted that the intention was to involve leadership from units providing reference across the Library and to emphasis reference as a shared endeavor. Making this leadership role a “central” function might create an emphasis on a single reference location, possibly marginalizing others.
• Lisa Hinchliffe suggested that the User Education chair serve as ex officio on RSC and vice versa. The charge from the Executive Committee mandates that the RSC Chair serve ex officio on the Services Advisory Committee, as does the User Education chair, so there was some feeling that this would be an unnecessary redundancy.
• Frances noted that EC has suggested that committee charge does not have to be in the bylaws, and it is probably better that it isn’t in order to provide the group with flexibility.

4. **The team recommends that the level of service (in terms of hours and level of staff expertise) at each the reference desks and the specialty reference desks should be determined using a combination of the level of questions received by aligning the READ Scale with the level of activity at each desk.**
   • Kirstin Dougan suggested the following alternative wording for this heading: “The staffing profile (number and expertise level of staff on a given shift) at all reference desks across the Library should be based on the amount of and difficulty of questions as measured via the READ scale and DeskTracker.”
   • Al Kagan suggested that the special status of Slavic Reference Services as a Title VIII funded program and its relationship to IAS be specified in the report. Similarly, consideration will be needed for federally mandated government information agreements.
   • Will there be a standard staffing model for a given level of activity or will the hub set this for its affiliated personnel? This is something for RSC to discuss and share best practices and work to address inequities.
   • Pat Allen suggested that reallocation of personnel across units will be needed, but is there an administrative mechanism to do this? Lisa agreed that this is not resource neutral, so maybe the report should add a caveat “within the limits of budget allocations.”

5. **Each hub will specify a minimum number of scheduled reference service hours (as defined on p.4 of the draft report), that personnel contributing time to the desk will provide.**
   • If someone can only contribute 2 hours to a desk, is it cost effective to train and schedule people for that?
   • Who is responsible – is this a collegial process or is this done by the manager of that desk? The process needs to be specified. The relationships and expectations for different types of personnel (GAs, librarians, staff) also should be specified.
   • The current language leaves open the possibility that affiliated reference personnel may provide only office hours. Was that the intention? Nancy O’Brien suggested that would need to be determined in conversation with the hub or specialty desk. Balancing on-site, virtual, and “office hours” for reference services will need to be part of those discussions.
   • Pat Allen noted that the emphasis of this point is “contributing to the service mission” of the Library overall.
   • Frances asked if people thought including more examples in the report would be helpful. There was general agreement that examples could help clarify certain points.

6. **Librarians in Research and Scholarly Services should seek opportunities to staff desks outside of the Main Library as needed. The Team strongly encourages librarians outside Research and Scholarly Services to participate in staffing other desks and to participate in cross-training.**
   • Team members noted that this an aspirational recommendation.
   • Others suggested that part of the point is to break down some of the silos – a worthy goal, but difficult to achieve – and to build capacity for provision of services.
   • Can the language here be clarified? Phrases such as “be available” and “as needed” are problematic and may lead to unrealistic expectations. The intention is a bit clearer in the
draft report, but could be more explicit there as well. One suggestion is to replace “as needed” with “in order to facilitate cross-training and provide a consistent level of service across the hubs and specialty desks” (if that, in fact, is what is meant).

7. The Reference Services Committee will be responsible for coordinating the staffing and training plans for the four hubs, the communication of levels of services, as well as assessing the success of the staffing model.
   - The idea is to take a collaborative approach to coordinate staffing and services to ensure excellent reference services to all patrons.
   - Is the assumption that resources are correctly allocated across units? That is, are we starting from a baseline that will allow us to tweak from where we are starting?
     - The intention is to start where we are. We have no new resources to allocate.
   - What level of service will remain in BEL and Education and Social Science? Frances noted that the team was asked to plan a staged implementation, with “Education and Social Science, History, Philosophy and Newspaper, and Communications...” not included in the shared desks until after Fall 2011. The team hasn’t addressed this yet, but should.
   - The difficulty of setting service and staffing levels is exacerbated by the fact that not everyone is using READ, or even DeskTracker to provide evaluative and statistical data.

8. The Implementation Team recommends that all subject specialists participate in virtual reference that is appropriate for their clientele, including staffing the virtual desk.
   - The virtual desk needs to be better explained and defined in this report. The virtual desk is actually a physical place where people provide virtual service. It is different than monitoring IM as part of office hours.
   - Clarification of virtual services (email, IM, and so on) need to be stated in the report.

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.
   - Lisa suggested adding liaisons to campus programs/campus initiatives to the database (e.g., Ethnography of the University), and offered to share a database she and Paula Carns worked on for the Services Advisory Committee a couple of years ago.
   - As distinct from the database of experts available for internal consultation maintained by staff development and training, everyone on this list is expected to accept referrals of patrons.
   - Is this meant to track referrals or interactions? No, Desk Tracker does that.
   - Will this be available for public view? Not initially, but it would be useful for patrons.

OPEN QUESTIONS/DISCUSSION

- It appears that the intention is to help RRGIS along; is that the intention? No, we would like it to be bigger than that. The big picture is getting everyone on the same team. It’s not about centralizing around RRGIS, but about breaking it down and making reference a Library-wide effort.
- A question was raised about the financial implications, but the Team was not provided with that information.
- This is not work-load neutral – what will be de-emphasized to support this function? Actually, it is because we are dealing with staffing exigencies and the need to make better use of resources that restructuring is being pursued. Others observed that it is difficult to ask for more from already overextended personnel who have faced no salary increases for years in conjunction with increasing demands in the workplace.
• An observation was made that success depends on individual effort and anyone can opt-out. That is problematic for instruction, and catastrophic for reference services. Lisa suggested that we need someone full-time to keep track of the initiatives and services. Others rejected the idea of hiring another Coordinator in these financially difficult times.

• The overriding goal is to keep the focus on the external user and their best interests. One of the assumptions guiding the team is that “reference is a Library-wide priority, 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.”