Reference Services Implementation Team Charge

Background

Reference interactions across the University Library have changed dramatically in the past decade, including a substantial increase in the number of questions being asked virtually in all subject areas, increasingly complex questions being asked virtually, and more specialist librarians working with their users in consultations (both in the University Library facilities and in embedded office hours) or over e-mail. 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. Several service points have reduced hours in response, 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 was charged to develop a robust and sustainable model for providing reference service across the Library. The model proposed by that team seeks to enhance access to the subject expertise throughout the University Library while increasing our capacity to provide quality reference service to all library users, whether they engage with the L’s physical or virtual presence.

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 is being charge 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. Should the transition be accomplished quickly or in stages?
   b. If the implementation is staged, 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?
   c. 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?
d. 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 15 and a final report is due April 15.

Approved by the Library Executive Committee: [DATE]