Reference Organization Models

Reference NSM Minutes from 4/1/2010

Background

The group recommends organizing physical reference services into a combination of larger interdisciplinary service points, and consultation spaces for higher level research needs, and research that involves mediation of physical collections. The larger service points would be centered in larger physical library spaces (Main library, UGL, Grainger, ACES), and will have librarians and staff cross-trained in the disciplines served by each desk. Smaller spaces would offer consultation services, and work with the larger interdisciplinary desks on referrals. Finally, larger desks will help the library maximize hours of service and staff training in the face of shrinking GA budgets, subject specialist attrition, increasing operational costs, and other budgetary factors.

Assumptions:

• In order to provide quality service at reference desks serving broader interdisciplinary needs, regular cross-training is required; librarians can help train back-ups for their subject specialty to cover vacations, conferences, or differences in schedules;

• A robust referral and consultation model (see below) should be implemented to ensure that higher level questions get referred to the appropriate subject specialist;

• Individual collections will still receive walk-up traffic and questions; service level agreements should be defined that articulate how in depth a question can be answered on site at any hour the collection is open, and what level of question might need to be answered by appointment or during certain hours (e.g. subject specialist office hours);

• Subject Specialists have a variety of options for where and how they can provide reference; as an individual won’t be available everywhere and at all times, Subject Specialty (through cross-training, libguides, Fast Answers, etc.) should be available to patrons in a wide variety of communication formats and locations (reference desks, chat, SMS, email, etc.).
Baseline Expectations of Reference Service

• Service levels for each service point:
  
  o Walk-up (circ desks) *(Note: may vary based on level of staff available and location; would need to be defined for each open service point, perhaps in 1-3 tiers)*
    
    ▪ Information/Directional
    ▪ Locating Known Items in Voyager (books, reserves, movies, etc.)
    ▪ Locating Known journal articles
    ▪ Locating known Article Databases
    ▪ Basic use of Easy search
  
  o Reference Desks and Chat
    
    ▪ Everything under Walk-up (above)
    ▪ Research Questions (finding introductory information on a topic)
    ▪ Higher Level research activities (finding multiple or in depth information; finding subject specific information)
      
      • These get referred during hours when a subject specialist is available within patron’s time frame;
      
      • These are answered when patron’s time frame does not allow setting up a consultation;
  
  o Consultations/Office Hours
    
    ▪ Handles research-level questions
    ▪ Can be regular (office hours) or scheduled
Physical Organization Models

All models include the following service points:

- **Reference Desks** - Physical service points which provide research assistance, staffed by cross-trained GAs, Staff, and librarians. Each model defines where these are located and what disciplines they serve.

- **Consultations/Appointments** – One-on-One meetings between subject specialists and users; may occur at a reference desk, office, unit library, or embedded location.

- **Walk-up** – Services provided to users walking into any library space; all units answer information/directional questions, some units may refer research questions to a reference desk others (e.g. Special Collections) may answer on site as needed.

- **Office Hours/Embedded** – Set times when a subject specialist is available for consultation; may occur at a reference desk, office, unit library, or embedded location.
Model 1 – Reference Desks

1. Main Library – 1 desk, Services SSD, A+H, Area Studies
2. Sciences – 1 desk in Grainger, serves PSED, and LSD
3. Special Collections – 1 desk in Archives;

Model 2 – Reference Desks

1. Main Library – 1 desk, SSD, A+H, Area Studies; Undergrad space in main lib. With possible 2nd desk;
2. PSED – 1 desk in Grainger
3. LSD – 1 desk in ACES
4. Special Collections – Service point in UGL, collections moved to UGL (per the 30 year plan)

Model 3 – Reference Desks

1. Main Library – 1 desk for SSD, A+H, Special Collections, Scholarly Commons
2. UGL – 1 desk (general questions, possibly lower level of staffing)
3. PSED – 1 desk in Grainger
4. LSD – 1 desk in ACES

Model 4 – Reference Desks

1. A+H – 1 desk in main
2. SSD – 1 desk in main
3. Area Studies – 1 desk in main
4. Scholarly Commons – 1 service point in main
5. PSED – 1 desk in Grainger
6. LSD – 1 desk in ACES
7. UGL – 1 desk in UGL
8. Special Collections – individual units
Virtual Organization Models

- **Chat/Ask-a-Librarian Service** – Monitors chat, email, and SMS; also possibly phone
  - **Model 1** – Separate chat desk staffed by librarians mentoring/training GAs; physical reference desks only handle walk-up questions (and possibly telephone)
  - **Model 2** – Virtual services staffed at physical desks at same time as in person services
  - **Both models** – Subject Specialists can sign on to chat for virtual office hours or other service models from their offices (or wherever);

- **Email** – Subject specialists also monitor their own email for referrals, consultations/appointments, etc.

- **Telephone** – Reference desks may have telephones; they can also be answered off desk by a call center.

Collaboration and Referrals

Required Characteristics:

- **Commitment to cross-training** – Subject specialists will help cross-train reference desk staff; *trainers* include both subject specialists who staff a physical desk, and those who only offer services through consultations, embedded librarianship, or other models.

- **Develop standardized referral system** – Possibilities include an online appointment book; developing a reference Subject Specialist list that include office hours and contact information for consultations; adding this content to the reference rolodex;