

**Main/UGL Reference Hub  
ANNUAL REPORT, July 1, 2012 – June 30, 2013**

*Prepared by:*

*Main/UGL Hub Management Team (JoAnn Jacoby, Kathleen Kern, Lori Mestre, Nancy O'Brien & Steve Witt)*

**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/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. Part of an ambitious plan to redefine reference service at Illinois as a shared enterprise that operates seamlessly from the user’s perspective, the Hub brings together subject and functional specialists from the Main and Undergraduate Libraries to provide reference and research assistance at two central on-demand information service points: the “Ask-A-Librarian” chat/SMS service and the on-site Information Desk in the Main Library.

Specific accomplishments during our 1<sup>st</sup> year of operation include:

- Created the infrastructure to facilitate the participation of librarians and staff across the Main/UGL complex in cooperative reference services, including the formation of the “Main/UGL Hub Management Team” with balanced representation from departmental libraries and central service units.
- Developed a robust program of orientation, training and ongoing professional development program to prepare all levels of staff to provide frontline reference service and ensure a consistently high level of services.
- Expanded the common core of knowledge about library/resources/subject areas and services, leading to better referrals and a more seamless user experience.
- Mentored new professionals. Opportunities to participate in training have provided an effective means of mentoring and acculturating new faculty and GAs.
- Provided staffing for a separate, physical, “Virtual Reference desk” which monitors chat and SMS questions during the busiest periods, providing 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 market penetration enjoyed by our chat service.

**B. Challenges (also discussed in specific sections below)**

- Lack of reliable, scalable chat software. The current service occasionally shuts down, undermining users (and operators) perception of the integrity and reliability of the service and limiting the participation of specialists and service points.
- Not all public service librarians in Main/UGL participate, and not all hubs are contributing as actively to Library-wide services. As a result, users have less immediate access to some areas of expertise.
- Non-participating specialists and those who don’t accept and/or reply promptly to referrals may be creating negative publicity and reputation for the Library.
- Referrals are not as consistent or robust as they could be; referral database/contact information is not always clear or up-to-date, leading to a lack of confidence about making the appropriate referral
- The Virtual Reference desk has been physically located in a particular unit (first UGL, now SSHEL) creating issues related to territoriality, management and hours of operation. These issues could undermine the perception of the service as a shared responsibility. There is also the difficulty that SSHEL closes earlier

than the Virtual Reference service, meaning that anyone providing service at that time (or later) needs to relocate to the UGL.

- Time commitment for training and scheduling reduces time available for other activities.

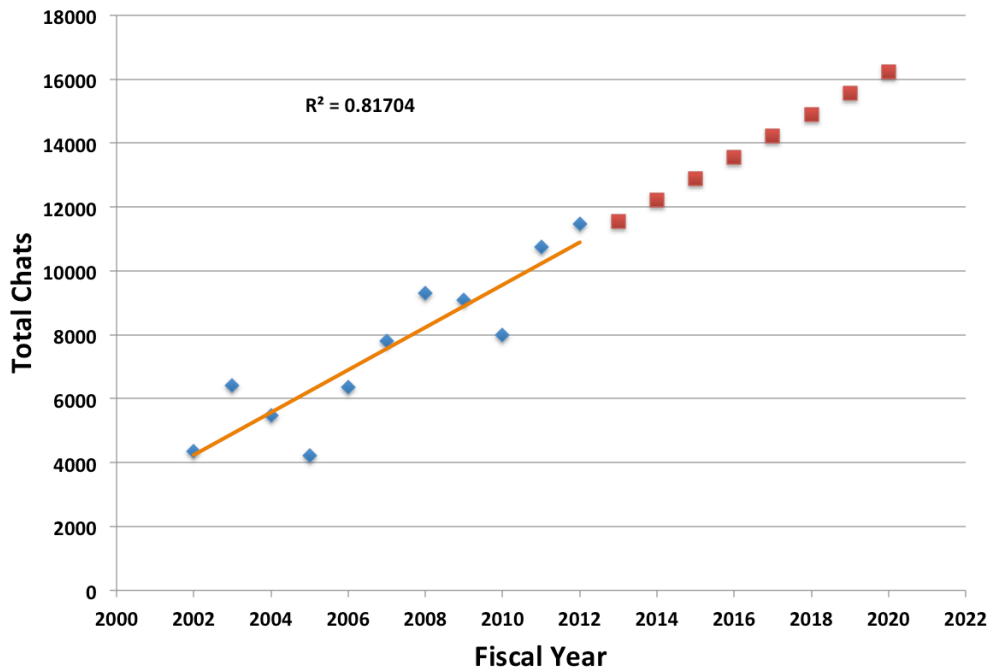
### C. Significant Changes to Unit Operations, Personnel, Service Profile, or Service Programs

- Realigned the basis for target hours from a target based on GA allocations (3 hours of hub reference services per week for every 10 hours of GA allocation received to one based on a set number of hours per FTE public service librarian or Academic Professional (AP), with latitude given to unit heads to designate a GA or qualified staff member in the unit to contribute hours in lieu of the librarian/AP.
  - Librarian/AP-based contributions: make it clear that supporting reference services is a shared responsibility;; ensure more consistent staffing levels and will help to ensure the equity of contributions from individuals with appointments in more than one unit.
  - This approach is in keeping with the Reference NSM proposal that “Reference services will be an enterprise shared by all Library faculty and staff with responsibility for providing [public] services” and that “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 specified in the [Subject Specialist Task Force Report](#), reference services are a core responsibility for subject specialists, a responsibility which includes “Participat[ing] in reference service (both physical and virtual) throughout the Library.”
  - As these reports recognize, involvement in library-wide reference services gives librarians the opportunity to connect directly with their users (many of whom are making use of chat and SMS in increasing numbers), as well as an opportunity to cross-train, mentor and learn from other librarians and GAs with a goal to improve reference services across subject and functional specialties. For newly hired librarians in smaller units, participation can also provide direct and sustained contact with other librarians
- Received central funding for Schedule Source, a robust web-based scheduling program, for use in creating schedules and facilitating shift swaps in the Hub, as well as other interested service points. We were able to negotiate a discounted rate for up to 200 seats. The RRSS Senior Library Specialist will provide initial training and desk configuration to International and Area Studies (IAS) Library; the Hub; the Social Sciences, Health & Education Library (SHEL); and the Undergraduate Library (UGL).

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

#### Information Services:

- The formation of the Main/UGL Hub brings subject expertise into central reference service points, and may also strengthen referrals, create partnerships, enhance the overall quality and consistency of service, and be a nexus of change toward an organizational culture of shared services and shared learning.
- The Main/UGL Hub has also provided flexible staffing for supporting reference services when and where the patrons are working. Last year’s ARL statistics showed a 5% increase in reference activity across the Library, with the largest growth in virtual reference. The trend of the data over the past 10 years for virtual reference, our largest area of growth, suggests this demand will continue to grow, as shown in the figure below.
- This 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. However, while the Main UGL Hub provides flexibility, we still operate within some physical constraints. For example, we may soon need a space for the virtual desk that can accommodate a third workstation if growth continues as predicted.



### 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 service improvements, training topics and approaches, and adjust staffing levels.

### Staff Training and Development

- Worked with GA supervisors from SSHEL, UGL & RRSSS, and with the Staff Training and Development Librarian to develop an orientation, training and ongoing professional development program to prepare all levels of staff to provide frontline reference service and ensure a consistently high level of service required for staff participating in the Main/UGL Hub, but open to all other interested staff. The spring sessions focused on building deeper expertise in specific subject areas, especially those subjects or topics for which we get the most chat reference questions. To accommodate the large size of the group, each session was offered twice. Training was coordinated by the Main/UGL Hub Management Team, the Coordinator for Staff Training and Development, and the GA supervisors from Reference, Research and Scholarly Services, the Social Sciences, Health and Education Library and the Undergraduate Library.
- Established the communication protocols, mailing lists, policy and procedure manuals which have played an important role in ensuring librarians and GAs with diverse backgrounds and prior experience are prepared to provide a consistently high level of service. The transition to this new model for staffing reference services involved both complex logistical planning as well as keen attention to the deeper aspects of a major cultural shift.
- 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 FY14 and beyond

- Implement a reliable, scalable chat software solution that allows us to manage workloads and share questions across our distributed environment.
- Continue to work with the Coordinator for Assessment and the Reference Services Committee to evaluate trends in reference activity levels to determine optimal levels of staffing across the Main-UGL hub service

- points. 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.
- Contribute to the development of stronger referral networks and continue to seek ways to make a more seamless connection between reference interactions and research support service/consultations with other subject specialists and departmental libraries.
    - A ticketing system like that used by IT & Facilities might improve the ability to track referrals and ensure that patrons' requests don't fall through the cracks.
    - Continue to encourage RSC & Grainger to create an interface that unit heads and/or individual librarians can use to update the Referral Database. Having up to date information would encourage more frequent use of this resource; outdated information diminishes the usefulness of the database and undermines staff faith in its reliability/authority.
  - Continue to build a culture across the Main/UGL Hub where all staff communicate and collaborate to achieve shared goals and provide a high-level of services to our users.
  - Engage in focused conversation with other faculty, units, and reference hubs doing work in support of reference in order to strategically lead changes to research services that evolve to meet emerging researcher needs and to ensure a seamless experience for library users.
  - Identify a neutral location for the VR Desk, in a location that is not identified with a specific unit. Ideally, the VR desk would be located in an enclosed or semi-enclosed space near the Information Desk and other central public services in a space that can accommodate 3 workstations to keep up with the growing demand for the service.
  - Create centralized training materials with interactive learning modules to reinforce classroom and on-the-job learning; continue to make training more hands-on, interactive, and develop ways to further reinforce concepts used in training through follow-up quizzes, on-desk discussion topics, etc.
  - Continue to improve training through adjustments based on feedback and assessment.
  - Expand participation in chat across all public service units; embed widgets more widely in library webpage, libguides, and databases; and advertise in campus sites (course management, student services pages, etc.).
  - Set-up a staggered membership for the Main/UGL Hub Management Team for 2014 and consider expanding membership to bring in new perspectives and energy.

## II. Statistical Profile

### 1. Facilities *Not applicable*

### 2. Personnel

Logistical support for scheduling and ensuring coverage of all shifts in the case of unplanned absences is provided by the Senior Library Specialist (Wendy Gregory) in Reference, Research and Scholarly Services. The managers of the VR Desk (Kathleen Kern and David Ward) and Information Desk (Kathleen Kern) work closely with the Hub Management Team on all aspects of management and administration of Main/UGL Hub Services and provide leadership in assessment, setting staffing levels & service standards, and the administration of crucial infrastructure like chat software & Desk Tracker . The Staff Training and Development Librarian and GA supervisors from RRSS (Kern), SSHEL (Beth Sheehan) and UGL (Ward) participate actively the development and assessment of the training program.

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. During breaks, such as intersessions and summer sessions, Reference Research, and Scholarly Services and the Undergraduate Library staff these service points. During the first year of operation, unit target hours were tied to GA allocations, with Reference Research and Scholarly Services providing additional hours beyond the required minimum. A number of individuals and units without GAs, including some individuals from the Office of Services and the Communications Library, also participated on a purely voluntary basis (though these units contributions will be

part of the new librarian/AP based model in the coming year).

Weekly contributions by units:

Fall 2012: RRSS: 162 hours, UGL:134 hours and all others units contributing a total of 67 hours per week.

Spring 2013: RRSS: 157 hours, UGL:126 hours and all others units contributing a total of 68 hours per week

| Unit                                       | Percent of Fall & Spring Hours |
|--|--------------------------------|
| Business Information Services              | 2%                             |
| Communications Library                     | 1%                             |
| Government Information Services            | 2%                             |
| History, Philosophy & Newspaper            | 1%                             |
| International & Area Studies Library       | 3%                             |
| Literatures, Languages & Linguistics       | 2%                             |
| Reference, Research & Scholarly Service    | 45%                            |
| Social Science, Health & Education Library | 6%                             |
| Office of Services                         | 3%                             |
| Undergraduate Library                      | 36%                            |

**3. User Services**

**Reference Stats type & mode of interaction**

| TYPE OF INTERACTION | Directional | Reference | Totals |
|---------------------|-------------|-----------|--------|
| InfoDesk**          | 8,693       | 8,491     | 17,184 |
| VR Desk             | 1,233       | 6,808     | 8,041  |
| <b>Totals</b>       | 9,926       | 15,299    | 25,225 |

| MODE OF INTERACTION | Chat  | Phone | In-person | Email | SMS |
|---------------------|-------|-------|-----------|-------|-----|
| InfoDesk*           | 12%   | 18%   | 64%       | 6%    | .2% |
| VR Desk **          | 99.8% |       |           |       | .2% |

\*The InfoDesk statistics in this report are for fall and spring semesters only, since those are the times when that service point is staffed by the Hub.. For complete yearly InfoDesk statistics including interims and summer sessions, see the RRSS Annual Report.

\*\*The VRDesk is staffed only fall and spring semesters and this is what is reported here. During the interims and summer, VR is staffed from the InfoDesk and is part of the RRSS Annual report.

**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

- o Fall 2012: 91 hours
- o Spring 2013: 91 hours

**Training sessions provided within the Library**

32 sessions (16 per semester) focused on developing basic reference competencies and developing skills in specific topical areas, required for those participating in the Hub but open to all.