Merging Reference & Access Services

An Experiment at the University of New Orleans

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The Way We Were

- Single staffing desks in two locations
- Losing staff
- Feast or famine
- Peak times hard to predict
- Users transferred back & forth between desks
- Us vs. Them mentality
The Way We Were:
Before Fall ‘04

**REFERENCE**
- Reference collection getting less use
- Decrease in “real” reference questions
- Without support for projects
- Others not knowledgeable about research tools

**ACCESS**
- Few opportunities for intellectual challenge
- Scrambling for back up during busy times
- Accused of “just sitting around”
- Sometimes “on” up to 7 hours/day
- Catch-all service point for the campus
The Transition:

Fall ‘04-Summer ‘05

- Cross-trained all Public Services staff over 3 semesters on basic Ref and Circ functions
- Six hours of training during intersession (3 sessions, 2 hours each with assignments)
- “Swapped” staff until everyone was trained
- Created a manual for quick reference
- Offer advanced reference or circ training every semester
- Reference offers in-depth research help by appointment
The Way We Are:
Summer 05-present

- Less overall staff, better overall coverage
- All Public Services staff can perform basic duties
  - Access staff can look up books, articles in major databases
  - Ref can pull reserves & ILL items, check in/out, take fines
- Better use of staff time
  - Reference “on call” during slow times; “on” during peak times
  - Circ staff work 50% on desk; 50% on projects
- Fair(er) schedules, more balanced duties
Benefits

- Everybody gives, everybody gets!
- One stop shopping for users/No more passing back and forth
- Better use of staff time
- Back-up help always available
- Able to learn from one another (sponge effect)
- Access staff knows more about research tools, more intellectual challenges
- Ref knows more about policies & procedures, can perform basic circ functions
- R-E-S-P-E-C-T! Understanding/Appreciating what others do
- Expanded cross-training and merge concept to student workers
Obstacles

- Proximity to Reference book collection
- Proximity to public use computers (lab)
- Hard to receive correction from coworkers
- Perception of status
- Keeping up with training
- Fear of change
- Who is in charge?
Will This Work in My Library?

- Adequate staff for two desks?
- Feast or famine (bored or overwhelmed)?
- Passing users back and forth?
- Us vs. Them mentality?
- Decrease in print usage/”real” reference questions?
- Users unsure of where to ask for help?
Selling The Idea

- Everybody gives, everybody gets
- Physical location of Ref may be less pivotal (chat & e-mail reference)
- More time for outreach and collection development
- Less “on” time for everyone
- New challenges for under-challenged staff
Other Options

- Cross training without merging desks
- A few “crossover” staff members or student assistants
- Adding lab assistants or tech support staff
- Cross training student workers
- Reference by appointment only
What We Learned

- United we stand, divided we fall
- Baby steps
- Walkie-talkies
- Only ask others to do what you’re willing to do yourself
- Make sure schedules and duties are fair
- Let experts teach
- Be prepared for conflict
- This will not solve all of your problems
One Stop Shopping:
The Monroe Library Experience

LOUIS Users Conference Fall 2006

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The Service Models Team

How we got started

*Reference, Circulation, Media Services, & Instructional Technology

Who is on the team

A little about the importance of process
Our charge

The Service Models Project Team was formed to review the library’s current service model, research best practices, and recommend a new model of customer service that will better serve the Loyola community.
From our charge: “Review current practices -- what we do now and how we do it.”

Looked at our current service model to:

- Understand where people go for help
- Understand what people are asking for
- Understand how people are being helped
From our charge: “Review and research information about our users.”

Researched feedback about the library

- Use statistics
- LibQUAL
- And other data

Researched today’s students, for example:

- The OCLC report *Perceptions of Libraries and Information Resources*
From our charge: “Review service models now in place in academic libraries.”

- Researched changes and innovations in library services and how libraries organize to provide services
- Identified best practices and innovations in service

Our goal:
A comprehensive plan that’s based on the research, that’s grounded in reality, that is uniquely ours, and that will address user needs with special emphasis.
Service Models Blackboard Site

Meeting notes
Readings
Personal reflections on the readings
Discussion topics
The Process
we read
we talked
we imagined
we investigated
we debated
we learned
we created
Group & Individual Work

• Talked with libraries around the country
• Surveyed staff
  – Circulation Team
  – Acquisitions/Cataloging Team
• We drew current and possible future models
• Developed a list of tier one services
• ALA session on involving all the players
• Developed decision making criteria
Our Recommendations

The group recommended the development of a one desk model that offers tier one services incorporating elements from circulation, reference, media services and instructional technology.

Users will be able to obtain basic assistance in research, technology, circulation assistance, and
This service point will function as the first line of assistance for library users.

It will provide direct support to the information commons and to areas in the building that are maintained by IT (Macs and the 24/7 computer wing).
This service model seeks to strengthen both the front of the house work and the back of the house work that is conducted by individuals and teams in the library, across campus, across town, and online.

It will support the growing importance of our work with faculty and students in the use of online resources and instructional technologies to enhance teaching and learning at Loyola.
Our Service Model is Based On:

- A commitment to excellent customer service
- the strengths of our team-based organization
- our dedication to the centrality of the library to higher education and its continued relevancy in the lives of our students and faculty
- Good referrals
- a commitment to training and innovation through the creation of a comprehensive training program.
• A strong student employee program
  – based on training, mentoring, teamwork & incentives, including a pay structure that rewards responsibility and service.
  – Student employees will play a key role in providing tier one service.
  – There will be a single group of tier one student workers
• Rethinking back of the house work, such as:
  – Stacks management
  – Shelf-reading, shelving, missing in stacks
  – E-reserves
• Honoring the collaborative nature of the existing reference desk and designing spaces for that to continue
• Developing a research by appointment service and changing “reference” to “research assistance”
• Honoring the relationships we build with our users and with each other
• Collaboration with campus support services to strengthen our services to students.
• Taking advantage of what we have and hoping that in the future we may be able to make more structural changes
And last but not least . . .

- a 19in flat-panel info screen at the front of the library (on the pillar that blocks what would be the front, most visible part of the desk).
Where we are now...

E-reserves to Blackboard
Working closely with Tech Services staff
Evening, Saturday and Sunday reference shifts from behind the desk
Evaluating collections behind the desk
Some physical changes behind the desk
Where we are headed...

Service Models will work with the Steering Group to establish teams that will look at:
- Training
- Staffing and new roles and responsibilities
- Assessments
- Collections behind the desk
- Space – function and design
- Stacks Maintenance
- Partnerships with WAC, IT, and other support services