



On-call reference: A case study

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Abstract

The way that physical reference service points have been staffed has been changing for libraries of all sizes and missions for many years. These changes—motivated by trends, budgets, and new efficiencies—include hours staffed, who staffs the desk, location of the desk, and so forth. This case study describes how a midsized academic library successfully implemented a technological solution to solve a physical staffing problem without sacrificing the fundamental mission of the department: providing timely assistance by professional librarians.

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D | On-Call Reference

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The way that physical reference service points have been staffed has been changing for libraries of all sizes and missions for many years. These changes—motivated by trends, budgets, and new efficiencies—include hours staffed, who staffs the desk, location of the desk, and so forth. This case study describes how a midsized academic library successfully implemented a technological solution to solve a physical staffing problem without sacrificing the fundamental mission of the department: providing timely assistance by professional librarians.

BACKGROUND AND HISTORY

Hunter Library is the sole library at Western Carolina University (WCU), located in Cullowhee, North Carolina. WCU is one of the 17 institutions of the University of North Carolina system. It is a regional comprehensive university that has increased 40% in size over the past 10 years. To meet the needs of a growing university population, the library has evolved in those 10 years, making changes and additions to resources, services, and public spaces. One major change began in the early 2000s, when the library began employing the liaison model for all new hires in the reference department. Liaisons would be responsible for broad disciplinary areas including the sciences, fine and performing arts, and education, among others. Though reference librarians had subject responsibilities for many years, the shift to focus more on subject specificity was in part to foster stronger ties with departments and programs across campus. As more librarian-liaisons were

hired, liaison responsibilities outside of staffing general reference service points and collection development increased. Librarian-liaisons were also providing more subject-specific information literacy sessions as their relationships with departments developed. These growing commitments began to put pressure on librarians' schedules. Though the reference department grew after the liaison model was implemented, peaking at nine librarians in the fall of 2007, by 2011, the department had lost one position permanently and was relying heavily on help from faculty and staff in other departments to run reference service points.

In response to these pressures, the reference (now Research and Instruction Services) department convened a Shared Reference Schedule Task Force in the spring of 2011. The task force was charged with reexamining the current staffing model of all reference services. While staffing of all service points was under discussion, the most visible service point—the reference desk—came under particular scrutiny. Desk hours occupied a very large part of all Research and Instruction Services (RIS) librarians' committed time.

Historically, Hunter Library reference librarians spent a lot of time at the reference desk, even with the assistance of nonreference librarians, staff, and temporary employees. The department had always been committed to providing excellent customer service; to accomplish that, two librarians staffed the reference desk during the busiest hours. Data presented to the task force detailed how much time was committed to double coverage over the past 20 years. Double coverage began in 1990 with just 12 hours total Monday through Thursday, not including evenings, which were also double staffed from 6 p.m. to 10 p.m. By 2011, double coverage in the evenings had ended but daytime double coverage expanded to 30 hours a week Monday through Friday. After examining these trends, discussing the department's workload, and committing to maintaining responsive reference services, the task force made several recommendations for scheduling and staffing changes.

TEMPORARY FIXES AND MAJOR CHANGES

The first changes the task force made were to the schedule. In addition to Monday through Friday reference service responsibilities, RIS librarians also worked Saturdays and Sundays, averaging four weekend days per se-

mester. Weekend work created scheduling difficulties on Fridays when librarians who had worked a preceding weekend day were out of the office, leaving the department short two librarians every Friday. The task force studied past service point statistics and then proposed reducing hours during the least busy times of nights and weekends, as well as for breaks. This was approved and put into place for the fall of 2011.

The double coverage versus single staffing conundrum remained. The department had already tried using “shadowing” as a replacement for double coverage in the summer and early fall of 2010. Shadowing required only one person to be at the desk, while the second person, or “shadow,” would work in an office behind the desk and come out to the desk when a queue formed. After a few short months, it became apparent that this was not working since shadowing still required committed time from two librarians. Shadowing was abandoned completely when the department was able to hire a fixed-term, full-time librarian. Double coverage was reinstated but at a lower level, only seven hours per week. The task force continued to search for solutions; one member polled listserv members for ideas. Her question was, “Our reference department is exploring ways to provide backup at the reference desk when the desk is single staffed. At our library the offices are scattered, and it is not possible to see when the person at the desk needs help. We are curious: how does your library provide backup for librarians at the reference desk?” The answers ranged from using wireless doorbells to instant messaging (IM) to using tiered/triage reference.

The task force debated the feasibility of these ideas. Members thought that the long-term potential for these solutions meshing well with our customer service philosophy was unsatisfactory. Some would not work well given the distance of some offices from the desk; others, such as tiered reference, were incompatible with our reference philosophy. The task force and department ultimately agreed that we would use both phone and IM for requesting backup help during single coverage, a continuation of previous practice. This was still not optimal, as an on-duty librarian might still be forced to leave a queue waiting for help should no one be available via phone or IM. Also, those librarians with offices right behind the reference desk shouldered more requests for assistance simply due to their proximity, prompting some complaints about equitability of responsibility.

FROM IDEA TO SOLUTION

As the fall semester progressed, the task force discussed finding a better alternative to the blind-phoning offices or sending a broadcast call using IM for help. No workable hardware solution seemed to present itself, and the software solutions that the task force had already considered were unsatisfactory. The task force, however, had not considered the growing world of tablet applications (apps) to solve the backup problem.

Work productivity apps designed for individuals have been popular for years and provide a breadth of solutions, so it made sense to investigate existing productivity apps for a solution for a group. Based on both task force and departmental discussions, the successful app would need to be technologically simple, easy for patrons and busy librarians to use, and send clear notifications to both those needing help and those responding to help. After several fruitless attempts to locate such an app, it was decided to approach the library's systems unit to see if they would help develop an application in-house. After several brainstorming sessions, requirements were refined and the technology was agreed upon. The development process was quite iterative, as several initial ideas did not function as desired or could not be made to work. But by the following spring, the final product was ready for pilot testing at the desk.

The "Call Button," an Android-based app, runs on a tablet that is mounted in a locked kiosk at the reference desk. The app's appearance is that of a large, white round button on a black background, with the words "Press for Assistance" centered in large lettering on the button. Once pushed, the app sends a message to a specially designated queue of the existing virtual reference platform. When the call is received in the queue, all logged-in users are notified that help is needed at the reference desk. The librarian who responds simply types in her name and the app sends the patron an automatic message (e.g., "Krista is on her way") that displays on the tablet screen. At the same time the patron message is generated, all logged-in librarians are notified that the call for help has been answered and by whom.

THE PILOT PROJECT AND FULL INTEGRATION

In mid-spring of 2012, the Call Button testing began. The pilot project called for the tablet—with the app running on the desktop—to be kept behind the desk for "call-a-colleague" use, for example, when the on-duty

librarian needed backup help. During that time, the app was debugged, the look and feel were refined, and several workflow procedures were clarified. For the pilot phase, RIS department members agreed that the Call Button would be used from 8 a.m. to 5 p.m.; there were no evening hours since physical backup was unavailable after standard business hours. Existing departmental policy already requested that all available librarians monitor virtual reference, which meant that since the app was seamlessly integrated into that platform, any logged-in librarian was also automatically monitoring the Call Button queue. During the pilot, the Call Button was used sparingly, with only 15 uses recorded, and some of those were for testing or troubleshooting. It was possible that this low number was due to physical location—it was not yet mounted in the kiosk, so it sat either in a drawer or on a shelf behind the desk—and/or the low need for reference services at the very end of the semester.

After this five-week pilot, the locking kiosk was mounted and the Call Button was ready for “just-in-time” testing. Just-in-time reference—providing service at the desk when a need arises—was in contrast to traditional “just-in-case” reference during WCU’s May minimester (a 12-day short semester where classes meet for eight hours a day and the library is typically deserted). Just-in-case reference required a reference member to be at the desk and staff all three service points (desk, phone, virtual reference) for several hours regardless of patron activity. Just-in-time reference service still required librarians to be assigned to desk shifts; however, staffing it was done by forwarding the phone to the on-duty librarian’s office and using the virtual reference platform to respond to online questions and any in-person patrons who used the Call Button. At a shift change, the oncoming librarian came to the desk and performed a visual scan of the area and library activity. If there were no immediate needs, she forwarded the phone to her office where she monitored all three service points.

During this pilot phase, RIS members were not required to switch to just-in-time staffing as some still felt uncomfortable with the app serving as the “face” of the desk. However, many did try just-in-time reference. For those who still preferred to sit at the service point, the app was used for call-a-colleague backup or to call for assistance when they were away from the desk assisting a patron. Statistics indicate that the app had very high use during the minimester, with 28 calls recorded in just four weeks.

At the beginning of summer semester in June 2012, the department put the Call Button app into place permanently. We agreed that during the fall, spring, and summer semesters, we would single staff the desk and use the Call Button from 8 a.m. to 5 p.m. for requesting backup help. During breaks and the minimester, the desk would be single staffed from 8 a.m. to 5 p.m., and librarians had the option of using just-in-time reference, thus could staff the desk from their offices. Procedures for daily setup and take-down of the tablet were also established. The librarian at the reference desk for the first morning shift would get the tablet, start up the app, and secure the device in the kiosk. The librarian working the 5–6 p.m. hour would take the tablet out of the kiosk, lock it up, and set it to charge.

Though the app was fully integrated before the fall semester, there was no external advertising or marketing. The department thought it would be best to wait until after using it for a standard academic semester. This delay necessitated more patron education than intended; some patrons were uncertain if they should push the button or not and would leave without help. There were also a few patrons who, as they made eye contact with a waiting librarian, pressed the button while asking, “What’s this?”

MEASURING SUCCESS AND LOOKING FORWARD

From summer 2012 through December 2013, the statistics captured by the virtual reference provider indicated robust use of the Call Button. There were a total of 89 uses of the Call Button from summer 2012 through the fall semester. In 2013, a total of 224 uses of the Call Button were recorded, with usage increasing drastically for the summer of 2013 compared with the summer of 2012 (13 calls in 2012, 54 in 2013). While these numbers are encouraging, there are some flaws in the statistics, including calls never answered, calls canceled, and calls made as part of the troubleshooting process. Troubleshooting calls have decreased since 2012, but it is unlikely statistics for calls never answered or calls canceled will be parsed from the main data. It is also too soon to identify any long-term trends because there is not enough data yet for meaningful interpretation.

The Call Button app has been successful, but that does not mean that all staffing issues are resolved. When using technology to solve this type of problem, human frailties must also be considered. Everyone in the department must remain sensitive to ongoing staffing issues; backup is not

backup if no one is around to provide it. Other human-based issues include simple mistakes, like typing more than a name when answering the Call Button queue (which garbles the reply message) to librarians forgetting that the button is for call-a-colleague as well as for just-in-time or backup use. The latter is related to some changes to the physical setup of the kiosk that affects the app's usability. The kiosk is in a fixed position so the tablet faces patrons. When the desk gets busy, it is easy to forget about the app and revert to old habits like running around looking for help or continually asking only front office librarians for help. The next step is to upgrade the kiosk so it will be multidirectional. This will enable both a librarian view when someone is physically at the desk as well as patron view when it is necessary to leave the desk to assist someone or for just-in-time reference service.

The Call Button app has become an indispensable tool, despite some of the flaws of the current physical design. As RIS looks forward to continuing changes to services, this app will also evolve. It is doubtful that the RIS department will ever reinstate double coverage, despite some excellent benefits to both patrons and librarians. Luckily, the Call Button allows RIS to provide the timely, professional reference service that patrons want and for which the department is known across campus.