

Assessing the Role of Reference: Prioritizing Users and Emphasizing Critical Thinking in Collaborative Workflows

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I. Background

George Mason University is Virginia's largest public research university with an enrollment of 39,032 students in fall 2020. Reference support at George Mason University Libraries has been in a state of change as librarians, library staff, and library administration explore the best ways to offer research help to our growing campus community.

In 2016, the library moved from a traditional reference service to a combined information desk at Fenwick Library, the largest library at Mason, and created a new Information Services team that was tasked with answering reference questions. Subject librarians were no longer required to provide reference hours on this new combined desk and moved to a consultation model to help students with research. Two years later, the dean of libraries restructured all library teams and Information Services was combined with the Teaching and Learning Team. The restructured teaching and learning team was focused on classroom instructional support and running a branch library on campus. Access Services now completely staffed the information desk in Fenwick Library. Reference services in the library continued with the consultation model for subject librarians and virtual reference assistance provided by subject librarians and the teaching and learning team.

After this transition, Access Services staff members felt overwhelmed with their regular duties and additional reference questions coming to the information desk, but there was little data that demonstrated the types of reference questions being asked. These changes influenced perceptions, causing interdepartmental tensions that then led to a lack of a defined path of communication for users seeking assistance. After getting feedback from Access Services about reference questions, an experimental reference service volunteer program was created that formalized a referral process and there was some preliminary data gathered in spring 2019. This program led to the more formalized assessment process in fall 2019.

This study aimed to look for a solution to these issues by investigating the need for reference services on demand. Twenty-three subject librarians and seven staff members of the teaching and learning team participated in this project as well as nine full-time employees and fifteen student workers of Access Services at Fenwick Library. Stakeholders were included in beginning discussions for the project management plan and participated in a representative task force for further discussions of the study's progress. Including stakeholders in these discussions revealed another goal of this study: to critically evaluate and manage user expectations, as well as expectations of each other, in a cross-departmental collaboration of services. It became essential to evaluate new, innovative ways librarians and staff would work together in the efforts of serving students and faculty.

II. Literature Review

Academic libraries have worked to develop reference programs based on both changing user needs as well as job expectations for librarians over the past couple of decades. Subject librarians in more recent years have worked more in instruction and outreach roles than they may have in the past, leading to more demands on their time. There is also a distinct difference between providing reference help versus working with someone in a research consultation, as research consultations take up more time and work

than reference questions tend to. As a result, Access Services departments have also changed rapidly to meet student and faculty needs, and their role has expanded, usually taking on some level of reference services previously handled by subject librarians. Libraries and their reference programs have adjusted to these shifting workloads, with varying results accordingly.

The origins of assessing reference transactions stems from a 2007 study that introduced the Reference Effort Assessment Data scale, better known as the READ scale.¹ This paramount research established a baseline for evaluating qualitative statistics for academic reference services. In the study, librarians were asked to rate their reference interactions on a scale from 1 to 6, with 1 requiring the least amount of effort and no specialized knowledge skills or expertise, and 6 requiring the most effort and time expended and in-depth library research skills and knowledge. The delineations between distinct types of reference questions established a need within academic libraries to determine scope of responsibilities for subject librarians, as expanded responsibilities became competing priorities.

Universities have experimented in the development of their reference programs. For example, there are many who, having fewer reference interactions recorded each fiscal year, decided to forego having the traditional reference desk altogether.² Indiana State University tried a merged desk model, where patrons with any reference, circulation, or IT (information technology) needs could go to a single service point.³ Others, such as Grand Valley State University, have reorganized their Access Services departments to become more user-oriented, which was done by creating two additional teams: the access and delivery team (focused on stacks maintenance, interlibrary loan, and course reserves) and the user experience team (took over all front desk and direct interactions with library users).⁴

Ford first proposed that libraries rid themselves of the reference desk due to the new technological era and the changes it would bring in library patron behavior, specifically in the ways people may find and use information.⁵ This was met with a lot of controversy and discussion in the field. This controversy has led to libraries responding this issue in different ways and no standard system has been widely adopted in decades. However, several academic libraries have adopted a single service point model.⁶ While there are many perceived benefits in this “one stop” system, including a central location for users,⁷ less shuffle,⁸ and better trained staff,⁹ there are also several points of contention. Blurred job expectations and confusion among a merged-desk staff may increase the number of referrals a patron goes through.¹⁰ There is also a time variable, where with more questions taking place at the desk, less time is available to help with reference questions.¹¹

Coleman, Mallon, and Lo did a national survey of librarians to determine trends in reference services and staffing and service quality and found increased use of student staff at service points, increased research consultations and instruction, and improved perceptions of reference service quality.¹² Bodemer strongly advocates for students providing peer reference services, going so far to say that “not only can undergraduates provide reference and instruction, they should.”¹³ Specifically, Bodemer argues that “peers can communicate with peers in ways that are simply unavailable to librarians” and that “academic libraries should not miss this boat.”¹⁴ The most effective reference model has not been discovered yet, as there are challenges that come with every new experimental system.

III. Methods

In response to the issues observed in our current reference model, we designed an assessment project for the fall 2019 semester to understand the reference activities occurring at Mason Libraries from both the perspectives of subject librarians and Access Services staff. This project had subject librarians on-call in their offices during specific hours to answer reference questions. After gathering a representative task force of managers, subject librarians, and Access Services staff, we defined three different levels of questions in order to determine the need of subject librarians on-call. These questions were divided into

general categories: directional (Tier Level 1), reference (Tier Level 2), and research consultations (Tier Level 3).

Data collection took place over the course of eight weeks. These weeks were chosen based on statistics at the information desk and assignment due dates. Access Services submitted data for which tier level question was asked, as well as their response utilizing tick marks, which were logged weekly in a combined spreadsheet. Response options included: whether they referred to the on-call librarian; referred to virtual reference (VR); were unable to refer; or did not need to refer. On-call librarians submitted data to a community Google Sheet indicating which tier level question was asked, as well as if they referred them to a specific subject librarian. We collected dates and times of all reference interactions.

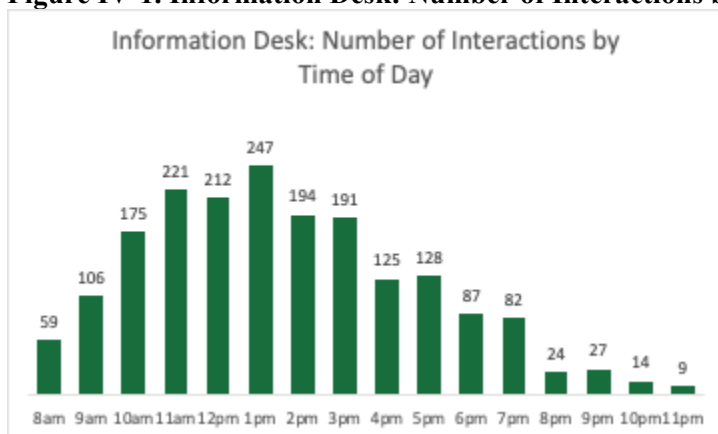
We followed the data collection process with three open feedback sessions to hear from staff providing the service. We also compiled our general service desk data collected by a Qualtrics form, as well as Springshare’s LibStaffer on-call schedule data. After data collection, the task force discussed recommendations based on analysis of the data and submitted a final report to the dean of Mason Libraries.

IV. Findings

During our data collection period, there were a total of 1,901 interactions recorded from Fenwick Access Services staff and total of 56 interactions recorded from subject librarians on-call. Most of the questions asked at the desk were directional in nature, with a mix of Tier Level 1 and Tier Level 2 reference questions. According to the information desk data, 145 patrons were referred to an on-call librarian. Access Services staff were unable to refer patrons in 88 interactions, or 4.6% (which refers to instances where there were no available on-call reference librarians, the transaction occurred outside of VR hours, or the staff were unable to refer due to the nature of the transaction). The majority of questions asked during on-call shifts were Tier Level 2 (17 interactions, or about 30%) and Tier Level 3 (33 interactions, or about 59%).

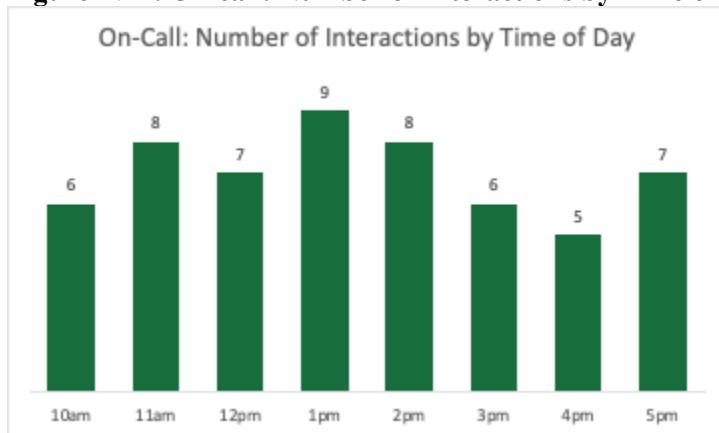
Data collection also revealed useful information regarding staffing times. In *Figure 1*, the data shows that between 11:00 a.m. and 2:00 p.m. are generally the busiest times at the information desk. The least busy times are between 8:00 p.m.–12:00 a.m.

Figure IV-1. Information Desk: Number of Interactions by Time of Day



This correlates with the on-call data (*Figure 2*), with 1:00 p.m. having the most interactions and 4:00 p.m. being the least busy time, according to the on-call data.

Figure IV-2. On-call: Number of Interactions by Time of Day



In general, Mondays are the busiest days. According to the information desk data, the least busy days during on-call hours were Fridays. This differs from the on-call data, which shows Wednesdays as the least busy days.

There is a large discrepancy between the information desk data and the on-call data. Out of 145 referrals, only 56 interactions were logged by on-call librarians. This means that there is a 61% drop-off rate of patrons who were referred (89 in total) but did not follow up on the referral. Twenty-one of the on-call interactions resulted in a referral to the appropriate subject librarian (about 38%), which means that these students were double referred.

According to the LibStaffer data, there were 235 on-call shifts throughout the data collection period, and 39 on-call shifts (17%) were given up and never filled. However, it is important to note that LibStaffer does not show shifts that were given up and claimed by someone else.

According to the open feedback sessions, there was consensus that Fenwick Library should provide some reference service. However, coverage and staffing of the reference on-call service in its current form was difficult to manage. With no official venues of communication, the service was not utilized to the best of its potential. There were also several problems regarding service location as librarian offices are often difficult to find and spread throughout the building. Additionally, some subject librarians from across branches were providing this service and did not have a workspace to use in Fenwick Library.

IV. 1 Original Recommendations

Assessment staff reviewed the data and made the following suggestions to Access Services and the Learning, Research and Engagement (LRE) team:

- Make hours more strategic based on data from the fall 2019 assessment.
- Create a central location where research consultations may take place, preferably within eyesight of the information desk to simplify the process for the user.
- Define a communication workflow utilizing tools already in use at the information desk and the libraries.
- LRE team leads and head of Access Services continually monitor the implemented changes throughout the semester, with assistance and support from the Assessment and Planning Department as needed.

The suggested changes started mid-January for the spring 2020 semester. Staff adjusted reference on-call hours to better fit the trends from the data and clarified the expectations of both the librarians and the

information desk staff with regards to the schedule. Proposed hours for spring 2020 were from 11:00 a.m. to 5:00 p.m., Monday through Thursday. This reduced shifts from 20 to 12, as fewer shifts would likely decrease the number of dropped and unfilled shifts.

Assessment and Planning staff worked with managers to advocate for repurposing a group study room near the information desk as a reference on-call office. This space was strategically chosen because of its location, as it is within eyesight of the information desk and would mitigate any wayfinding issues patrons experience (thereby also lowering any heightened patron library anxiety). Librarians could spend their shift in the reference on-call office or relocate as needed to help library users and could also act as a space designated for research consultations for librarians who travel between campuses. It is also expected to have a longer-term effect on the drop off rate of patrons who are referred but do not follow up with the librarian.

Staff also utilized an instant messaging service at the information desk to promote a higher level of communication between the desk and the librarian on-call. Those that utilize the reference on-call office would not need to rely on this same workflow utilizing technology. Access Services staff can manage unfilled shifts if there is clear communication that a shift was never picked up.

Unfortunately, these changes were derailed by the COVID-19 pandemic as the libraries were shut down on March 22, 2020 and did not reopen until the end of July.

The teaching and learning team began to train student workers to answer low-tier reference questions as well. The in-person training was cut short due to the university's closure, but it continued online via Zoom throughout the semester. The students worked through sample reference questions that increased in difficulty and role played their interactions with a librarian. The student workers also indicated when they would refer a question to their subject librarian. During this process, the teaching and learning team gathered data and are using this data to build a more robust training practice for the students. During this process, it was clear that the students did not always know when to refer a question to a subject librarian and wanted to help the patrons throughout their question. This has led to more student trainings on recognizing the difficulty of reference questions.

Finally, assessment staff adjusted the Qualtrics surveys for on-call librarians to distinguish between a regular research consultation and a reference question. The survey was also changed to include an option to designate the interaction taking place during a reference on-call hour. Initial meetings between the head of Access Services and the LRE team leads, unfortunately, were delayed by the beginning of the semester and then put on hold by the pandemic.

The first seven weeks of the spring 2020 semester did garner some data, despite the pandemic. However, note that data collection was supposed to take place throughout the entire spring 2020 semester. Here are a few points about the data collected:

- Drop off rate seems to have been solved generally, as on-call stats reveal more interactions (54 total) than what are reported from the information desk (35 total). This is probably due to new signage and change to a central location of service.
- Most popular days for on-call stats were Thursdays (16 total).
- Most popular days to refer to on-call from the service desk were Tuesdays and Wednesdays (both days reported 9 total).
- Most popular times were from 2:00 p.m. to 4:00 p.m. for on-call stats (9 reported for each hour).
- Most popular times to refer to on-call was 12:00 p.m. for the information desk (6 reported for this hour).

In comparison to fall 2019, there are differences in busiest times recorded. Instead of most interactions occurring between 11:00 a.m. and 2:00 p.m., this has shifted to 12:00 p.m. to 4:00 p.m. Mondays also saw less traffic this semester than the previous semester, which has shifted to being more popular later in the week (Tuesday–Thursday). Fridays continued to be the least popular day.

IV. 2 COVID-19 Impact

With the COVID-19 pandemic, and the university closure in March 2020, the libraries prepared for reopening for the fall 2020 semester, reopening August 25, 2020. The in-person services provided, however, were and continue to be limited due to health and safety restrictions. In-person and on-site reference assistance is not available for users at the time of writing and are all done through virtual reference and scheduled digital appointments with subject specialists. Information desk staff refer users to virtual reference and specific subject librarians as needed, and users do not currently expect immediate assistance in their information searches. Looking forward to when on-site services fully resume in a post-COVID-19 world, staff expect to resume meetings between the head of Access Services and the LRE team leads, both to discuss the original plans as well as any changes needed in the wake of the pandemic. The teaching and learning team student workers will also have received more trainings at this time and will hopefully be ready to take a more active role in the reference on-call model. This group will collaborate with the Assessment and Planning Department for any changes to the Qualtrics form used and to review data as needed and available.

V. Conclusion

Deciding the best course of action regarding reference services is a challenge that academic libraries have faced throughout the past decade. This challenge was met during a technological revolution, spurring virtual reference services, increasing physical space needs for study and group work, and rapidly changing job expectations for both librarians and staff. All of these variables required quick thinking and improvising on the part of academic librarians, and there is no “one size fits all” solution for academic libraries. Each library has made decisions based on their respective situation, and many are still experimenting with what is the best service model, both for our users and for our workflows as staff.

COVID-19 is yet another variable that we are now facing. The on-call program was completely shut down in spring 2020 and has not been reinstated, as most on-call subject librarians have telework agreements. This has significantly affected the initial timeline we were working with in the beginning of this study. Due to the complications COVID-19 has presented, the reference on-call service and discussions about it are delayed until all staff are able to return to work safely.

In a post COVID-19 environment, the reference on-call discussions will continue between the head of Access Services and the LRE team leads, with the Assessment and Planning department available for any data or assessment project planning needs. Collaboration will be even more crucial in this environment, because of the uncertainty brought on by the pandemic. It will be necessary to prioritize effective communication between all stakeholders, organized project management, and continued data-driven decision-making. New data collection will be necessary in order to make critical decisions about the reference on-call service, and what it may look like in the future.

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Jasmine Spitler is the assessment librarian at George Mason University. Previously, she worked at Florida State University as the space and assessment library associate from 2016 to 2019. Jasmine received her Master of Science in Information from Florida State University in 2018. Her primary research interests include library assessment, student success, user experience, and data governance.

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Melanie Bopp is the head of Access Services at George Mason University, having moved recently from Northeastern University where she worked as an access services librarian. In both positions, she handles a variety of customer service and information provision challenges, working to create that link between user and information. Melanie received her MLIS from Louisiana State University in 2011. Her primary interests in 15 years of access services has been on customer service and the student worker experience.

Endnotes

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