

Cutting the knot:

A Holistic and Pragmatic Framework for Public Services Measures

ZSUZSA KOLTAY
ELENA MACGURN
CORNELL UNIVERSITY LIBRARY

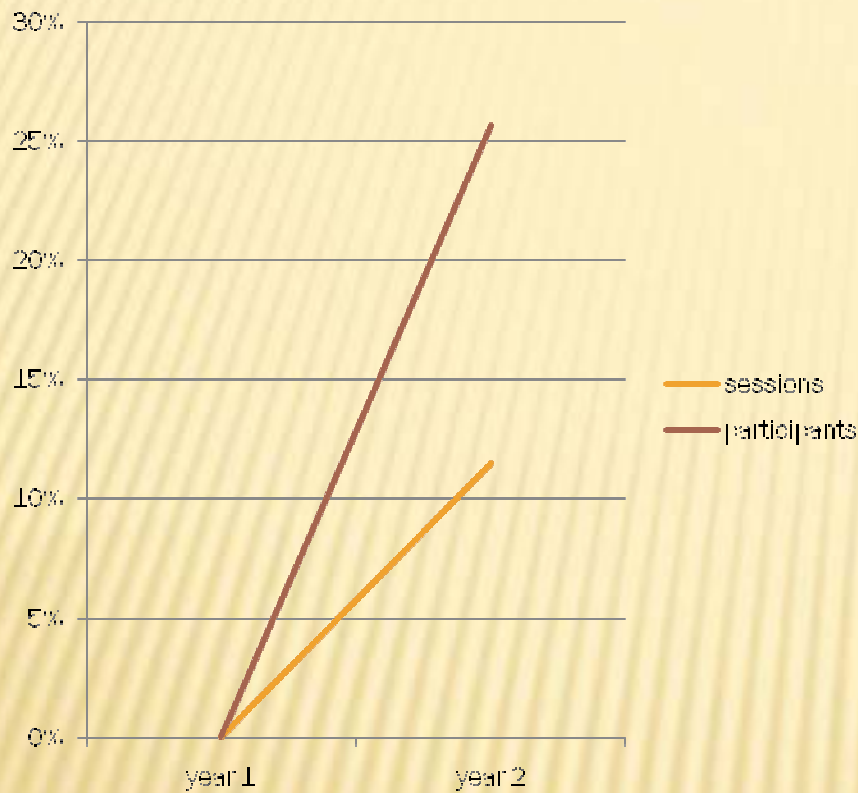


THE NEED

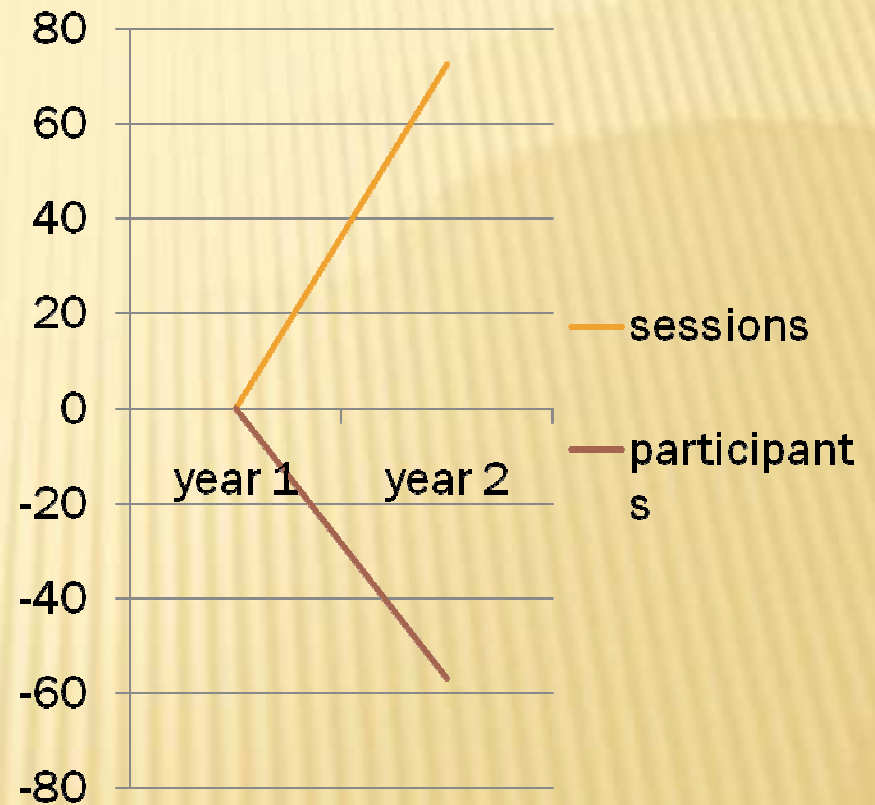
- ✘ Outgrew traditional categories
- ✘ Multiple unit libraries
- ✘ Unintended consequences:
 - + Undercount, overcount
 - + Inconsistencies



YEAR ONE: 12.5 PARTICIPANTS PER SESSION
YEAR TWO: 14 PARTICIPANTS PER SESSION



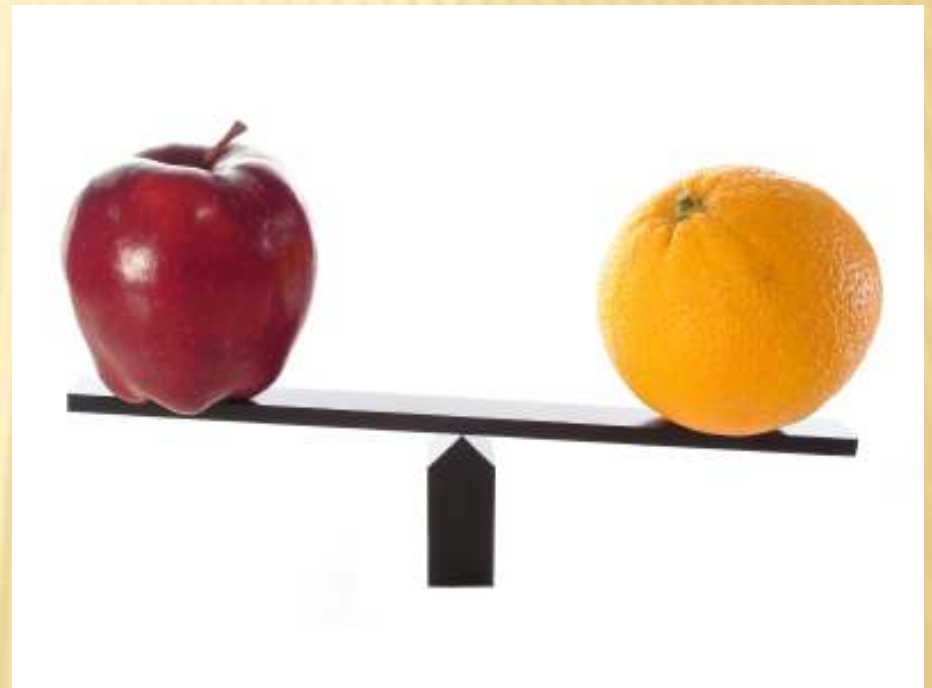
YEAR ONE: 9.3 PARTICIPANT PER SESSION
YEAR TWO: 2.3 PARTICIPANTS PER SESSION



EXAMPLE FROM TWO UNITS

PROBLEMS

- ✘ Benchmarking
- ✘ Internal comparisons
- ✘ Trending



FLEXIBLE APPROACH

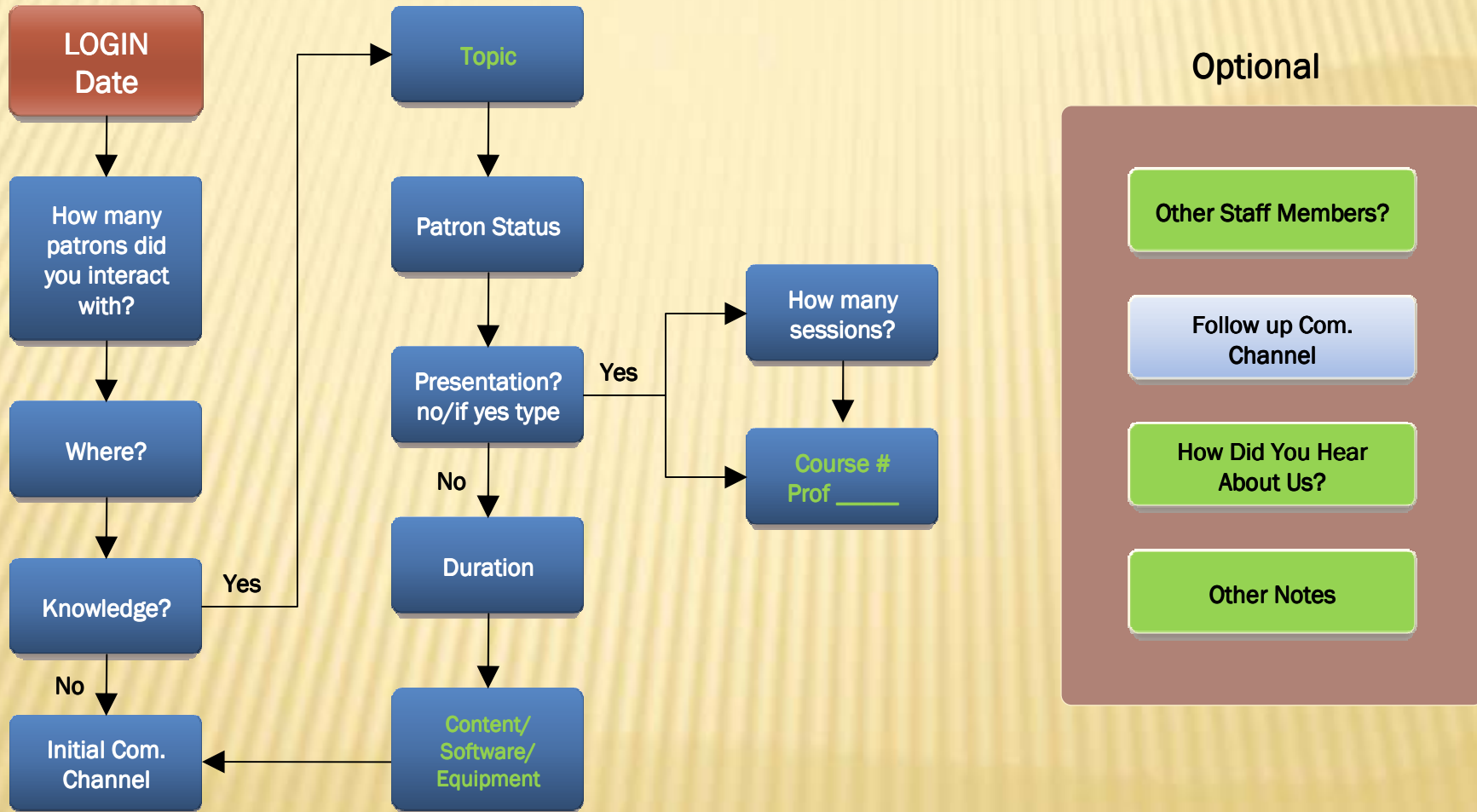
- ✘ Consistency and local nuance
- ✘ Holistic: step away from functional categories
- ✘ Definitions not frontloaded but come in at the reporting end
- ✘ Support decisions
- ✘ Balance richness of data and ease of reporting



HOW?

- × One system
- × Steps contributors through questions
- × Minimal need to apply definitions
- × Can be queried on combination of variables
 - + Consistent definitions
 - + Local need for specific configurations
- × Info contacts ≠ reference
- × Presentations ≠ instruction

FLOW CHART



REPORT EXAMPLES

- ✘ ARL: all non-presentations that involve knowledge
- ✘ ARL: all presentations to more than one
- ✘ units: equipment issues handled at desk A
- ✘ CUL/units: people we interacted with
- ✘ CUL/units: interactions outside the library
- ✘ CUL/units: faculty interactions lasting longer than x mins

COSTS

- ✘ Find/develop new system
- ✘ New procedure to learn
- ✘ In some cases more questions to answer

BENEFITS

- ✘ Can report outreach and selectors' info contacts
- ✘ Solves issues around consultations
- ✘ Consistent reporting
AND
- ✘ Reporting for local needs
- ✘ In some cases fewer questions to answer

IT'S A GO!



- ✘ Build/test system
- ✘ Engage stakeholders
- ✘ Train practitioners
- ✘ Continuous monitoring and ongoing development

COUNT IT

- ✘ No commercial solution
- ✘ Build and support in-house
- ✘ PHP
- ✘ jQuery for database connection



ENGAGEMENT

- ✘ Early and ongoing
- ✘ Broad based
- ✘ Usability (quick entry)
- ✘ Respond to everybody's general needs
- ✘ Keep it streamlined



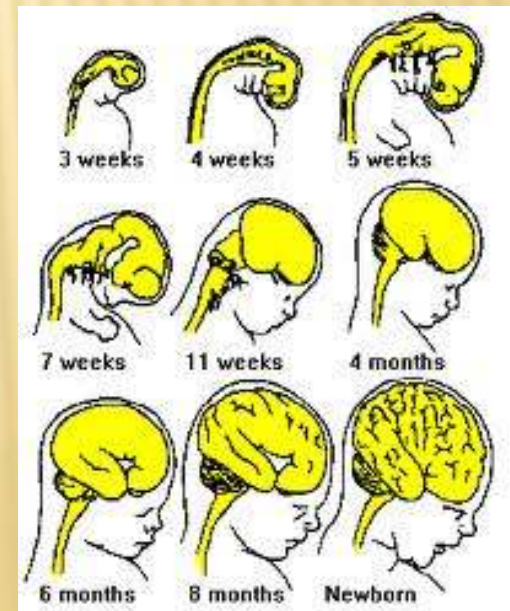
TRAINING

- ✘ Flexible approach
- ✘ Train the trainer for units
- ✘ Cross-unit discussions
- ✘ Lectures, hands-on, discussions
- ✘ FAQs
- ✘ Supplemental workflows for local needs



ONGOING DEVELOPMENT

- ✘ Monitor use and issues
- ✘ Functional standing committee and Public Services Executive Committee in charge
- ✘ Ongoing refresher sessions and discussions
- ✘ Suggestion box



ONE CATCH: KNOWLEDGE QUESTION

- ✘ Did the interaction involve the knowledge, use, recommendation, interpretation, or instruction of information sources or systems?



Enter a new transaction

Recent transaction (zk10)

Staff id	<input type="text" value="zk10"/>	Unit	<input type="text" value="cross-unit"/>
Staff name	<input type="text" value="Zsuzsa Koltay"/>	Location	<input type="text" value="library office"/>
Staff type	<input type="text" value="other"/>	Sublocation	<input type="text" value=""/>

Required

Date
Time

Duration (minutes)

Patrons
Patron Type

Mode

Content type

or add more details below...

Optional

Topic

Prep/follow-up (minutes)
 Follow-up mode

Other staff involved

Department
Who initiated?

How did patron find us?

Notes

Quick entry

Recent transaction
(zk10)

Staff id	<input type="text" value="zk10"/>	Unit	<input type="text" value="cross-unit"/>
Staff name	<input type="text" value="Zsuzsa Koltay"/>	Location	<input type="text" value="library office"/>
Staff type	<input type="text" value="other"/>	Sublocation	<input type="text" value=""/> (optional)

At a busy public desk, simply check the location/sublocation above, set the mode below, and click a button to record a transaction.

Mode

Directional
1 minute

Knowledge
Information
1 minute

Knowledge
Software/Systems
1 minute

Knowledge
Equipment
1 minute

Directional
5 minutes

Knowledge
Information
5 minutes

Knowledge
Software/Systems
5 minutes

Knowledge
Equipment
5 minutes

What's the difference?
see [types of questions](#)

Knowledge
Information
10 minutes

Knowledge
Software/Systems
10 minutes

Knowledge
Equipment
10 minutes

Or, [enter a detailed transaction](#)

Keywords anywhere

After date

Before date

Year

Month

Day

Hour

Unit

Location

Sublocation

Staff type

Staff id

Staff name

Knowledge?

Duration enter "<6", ">15", "30", etc.

Patrons

Patron type

Mode

Content type

Presentation?

Presentation type

Sessions

Department

Course

Topic

Prep/follow-up

Other staff involved

How did patron find us?

Notes

Search

CUL Count It! - Mozilla Firefox
 http://countit.library.cornell.edu/?mode=search&q=unit%3ALaw+knowledge%3Ayes+initiate%3ALibrarian
 CUL Count It! Search Count It
 unit:Law knowledge:yes initiate:librarian
 advanced search
 Dashboard Enter a new transaction Quick entry Help
 Logged in as Zsuzsa Koltay - change

Search

148 transactions matching **unit:Law knowledge:yes initiate:librarian**

Analyze these transactions by

[Export these 148 results](#)

Date	Time	Unit	Location	Sublocation	Mode	Duration	Topic etc.
2010-10-19	8:00am	Law	library office		in person	10	Obtain recalled books and have Janet back-date check in
2010-10-16	1:25pm	Law	library desk	reference	e-mail	2	recommended BNA article re Morrison
2010-10-12	4:30pm	Law	library desk	reference	e-mail	5	Book suggestions
2010-10-12	8:35am	Law	library desk	reference	e-mail	10	PLC
2010-10-11	4:32pm	Law	library office		e-mail	55	new books recommendations; delivered one title to OLU and she accepted several e-book recommendations
2010-10-08	2:25pm	Law	library desk	reference	e-mail	3	book suggestion
2010-10-07	1:10pm	Law	library desk	reference	in person	10	Book suggestion on M&A
2010-10-07	9:35am	Law	library desk	reference	e-mail	5	Collection development
2010-10-07	9:09am	Law	library office		in person	5	~information
2010-10-05	4:51pm	Law	library desk	reference	e-mail	5	new books list
2010-10-05	4:40pm	Law	library desk	reference	e-mail	5	new books list re tax
2010-10-05	4:30pm	Law	library desk	reference	e-mail	5	new books list
2010-10-05	3:45pm	Law	library desk	reference	e-mail	15	new books list & online law books at CUL for Sept, constitutional courts
2010-10-05	2:30pm	Law	library desk	reference	e-mail	10	new books list & Sept online books at CUL for the dean
2010-10-05	2:15pm	Law	library office		e-mail	5	new books list with book for which she was reporter
2010-10-04	8:30am	Law	library office		e-mail	2	recommended BNA article about Dodd-Frank Act and extraterritorial application
2010-10-01	8:15am	Law	library office		e-mail	30	InfoBrief blog posting re FDsys
2010-09-29	8:00am	Law	library office		e-mail	1	recommend BNA article about extraterritorial application of RICO; BHS thanked me.
2010-09-23	12:45pm	Law	library office		in person	40	new books recommendations
2010-09-23	9:30am	Law	library office		in person	15	BNA
2010-09-22	3:30pm	Law	library office		in person	20	Cancel paper BNA??
2010-09-20	4:13pm	Law	library office		e-mail	5	suggesting BNA bankruptcy materials for his course next semester

RESULTS

- ✘ Better reporting
- ✘ Broader range of interactions
- ✘ Improved speed and usability
- ✘ All transactions vs. sampling
- ✘ Increased transparency
- ✘ Better consistency
- ✘ More local nuance



Q&A

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