

Re-Inventing Reference

Lynn A. Sheehan

Abstract

For some time librarians at University Libraries (UL) at Grand Valley State University (GVSU) have been considering the shifting nature of reference services and its place in the contemporary academic library. At the same time, planning for a new building led to discussions about future library staffing, services, and resources at GVSU. These conversations along with the implementation of informative statistics, a new electronic discovery tool; and planning and implementation of an institutional repository resulted in focusing on the creation of a single-service point staffed with support staff rather than librarians to offer circulation and reference services. Elements of planning and rolling out the re-invented reference service, changing attitudes, staff training, and eventually assessment of the re-invented reference services were all part of the discussion.

Conversations about reference services and experimentation with different methods of providing reference have been going on at GVSU since the early 2000s. The conversations became more focused and deliberate in recent years due to a number of factors including a decline in reference transactions and in the use of the print reference collection; the implementation of new software for recording reference transactions; the implementation of a new electronic knowledge discovery system; the changing nature of academic libraries themselves; and the planning for a new library-learning center to open in 2013. The “perfect storm” created by a number of these factors converging in recent years led to the closing of a tra-

ditional reference desk and implementation of a single-service point staffed by support staff and student workers offering circulation and related services and reference from one location in January 2010.

Current Environment

Grand Valley State University is a comprehensive (Carnegie Master’s Large) state institution located in west Michigan and serves over 20,000 undergraduate students and more than 3000 graduate students in more than 200 areas of study, including 77 undergraduate majors and 28 graduate programs. University Libraries (UL) serves the students, faculty, and staff with three libraries and extends services to off-campus students and faculty at other locations in Michigan. Three libraries make up University Libraries—James H. Zumberge Library (Zumberge Library) on the Allendale Campus; Steelcase Library on the Pew Campus in Grand Rapids, and Frey Foundation Learning Center (Frey Library) in the Cook-DeVos Center for Health Sciences (CHS), also located in Grand Rapids. A majority of GVSU’s undergraduate academic programs and students are located on the Allendale campus while most graduate programs are located on the Pew Campus while health science programs are located at CHS. The libraries are staffed by twenty-five faculty and staff librarians and thirty-three support staff comprised of Clerical, Office, and Technical staff (COTs) and Administrative Professionals (APs) along with approximately twenty undergraduate student workers. The collection is comprised of over 400,000 print volumes located at the three libraries, a storage

Lynn A. Sheehan is Head of Liberal Arts Programs at Grand Valley State University

facility, and special collections and an extensive list of electronic resources and other materials.

Reference Services

The physical space and patrons differ at each of the three library locations as does the way reference services are currently offered. This paper deals primarily with the environment and services at Zumberge Library located on the Allendale Campus and the largest of the three libraries. The first floor reference area was remodeled in late 2005 and a new, oval-shaped Reference Desk with staggered heights was installed. Initially, the Reference Desk, located to the immediate right of the library entrance was staffed 65–69 hours per week by faculty and adjunct librarians. A triage system was developed in 2005 and COT and AP staff members were encouraged to volunteer to train and work at the Reference Desk along with librarians. Chat and e-mail reference services were added in the mid 2000s. During this time of experimentation, a Roving Reference service involving a librarian and notepad computer working out in the library was also trialed.

University Libraries Organization

Formerly led by a Library Director, the first Dean of University Libraries, Lee Van Orsdel, was appointed in 2005. Following the appointment of the dean, UL reorganized and moved away from a flat reporting structure where everyone reported to the Dean to a tiered organization that included middle managers and team leaders. In the tiered structure there are two associate deans, two directors, and six team leaders heading up groups made up of COTs and APs or tenure-track library faculty, depending on the unit. Management of reference services moved from the Research and Instruction (R&I) unit to Technology and Information Services (TIS) unit along with public and technical services. In addition to a structural reorganization, UL has also moved to focus its services and work more closely and strategically with the institution and now regularly creates, revises, and updates the *University Libraries Strategic Plan*¹ aligning UL goals and plans with those of the institution.

Climate

University Libraries is fortunate to enjoy a supportive relationship with GVSU administration and faculty. This support is expressed not only in the budget and the addition of positions in the past five years but also

in the planning and construction of the Mary Idema Pew Library Learning and Information Commons² which will open in the fall of 2013 on the Allendale campus of GVSU. Planning for the design and construction of this \$70 million structure is one of the elements that contributed to conversations about reference and other services both in the current libraries as well as the new building.

Challenges = Opportunity

Planning for the Pew Library played one part in the move toward re-examining how reference services are currently being offered at Zumberge Library. Another piece of the process was the competing priorities for liaison librarians' time and the shifting reference environment. University Libraries administration has played an active role in the recognition of the changes currently occurring in scholarly communications. The desire to develop an institutional repository at GVSU and to lead the campus in the creation and archiving of scholarly communication created the need to work with librarians to develop expertise and new skills to work with scholarly communications and faculty. Like librarians at other institutions, there was a recognition of the need to let go of some activities or responsibilities in order to add new ones like the Institutional Repository. This type of rethinking of liaison responsibilities is described by Kara J. Malenfant in her 2010 article³ about changes in library faculty responsibilities and accountability at the University of Minnesota.

Literature Review

When discussions regarding reference were initiated in 2008 as part of the planning process for a new library and information center, the literature describing single-service points related primarily to smaller or special libraries. However, certain articles still aided in framing discussions on how to plan for and implement a single-service point and described the issues relating to the changing reference environment.

In their 2007 article⁴ in *Issues in Science and Technology Librarianship*, Powell, Michelson-Thiery, Bryan, Koltay, and Patterson described the redesign of service points at the Engineering Library at Cornell University provided one of the few accounts of combining circulation and reference desks at a larger college although the library itself was still a small, specialized one. In 2007 the College of Engineering

at Cornell had about 2800 undergraduate and 1,200 graduate students along with 230 faculty. Powell and co-authors describe the tiered system for providing reference services that developed in the Engineering Library and the staff development and training that contributed to the process there. The authors also describe the need for transition management.

A 2000 article by Flannagan and Horowitz, "Exploring New Service Models: Can Consulting Public Service Points Improve Response to Customer Needs?"⁵ describes M.I.T.'s experiment with combining reference and circulation staffs at one integrated service point. The article reports on the Public Service Redefinition (PSR) process and shares not only the successes realized from the trial but also the shortcomings or un-realized benefits. The shortcomings included the failure to realize the intended benefit of freeing up time for staff and librarians and making all staff mobile. Also described are the qualitative measures identified for the Engineering Library that were used to develop surveys to assess a semester long pilot.

"Lessons Learned from a Single Service Point Implementation"⁶ by Allegri and Bedard, a 2006 article, attempts to define a single service point and describes two examples in academic health science libraries. The authors recognize the importance of involving all staff in the process and also ways to support librarians in maintaining current skills and developing new ones.

The importance of and approaches to staff training for a single service desk are described by Moore, McGraw, and Shaw-Kokot in a brief 2001 article, "Preparing Staff to work at a Single Service Desk."⁷ Moore and co-authors outline the staff development and evaluation tools developed at the University of North Carolina: Chapel Hill, one of the two libraries described by Bedard and Allegri in their article.⁸

Rachael Naismith shared results of an informal, e-mail survey of academic libraries that have combined circulation and reference functions into one service in a 2004 article.⁹ Naismith describes seven models or designs for providing services from a single-service point and includes some anecdotal comments from survey participants.

More recently Theresa S. Arndt¹⁰ describes the examination of traditional references services and the subsequent move to a single service point at Dickinson College. Arndt includes suggestions for critically reviewing reference services in addition to sharing the

marketing goals, training development, and on-call system developed during the move to a single-service point at Dickinson.

Interestingly, at GVSU prior to 2010, the Reference Desk was already staffed with a combination of APs, COTs, and students working with faculty librarians at times and on their own at other times. While much of the evidence found in 2008 referred to implementing the idea in smaller, satellite, or specialized libraries there was a desire at GVSU to experiment with a single-service point at Zumberge Library, the largest and busiest location, to trial things to come when the Pew Library opens in 2013.

Informative Statistics

In 2008 librarians at GVSU began to examine alternatives to the traditional hash mark or tic and paper system of keeping reference statistics and LibStats was adopted and rolled out in June of 2008. Originally created at the University of Wisconsin: Madison libraries, LibStats¹¹ offered the ability to capture the same information noted via tic marks for a number of years but also to include information about the questions and answers and how librarians and reference desk staff were spending their time. This customizable software could be used to answer questions librarians have about questions at the Reference Desk and other locations where reference services are offered. It allowed reference desk staff at GVSU as well as those answering questions from other locations (for example, librarian offices and academic departments) to capture qualitative detail of the transactions in addition to simply counting the number of reference and directional questions. After collecting data with this new tool for a year, librarians began to capitalize on the informative nature of the LibStats data and the resulting studies/projects contributed to initiating some new conversations regarding references services at GVSU University Libraries.

Another change was the migration to a new integrated library system (ILS), Millennium, in 2008. The new ILS offered enhanced capacity over the previous system used by University Libraries to capture data on in-house use of non-circulating items from Reference in addition to the traditional circulation statistics garnered from the previous system. UL followed the migration to Millennium with participation in the beta testing and early adoption of Summon, the web-scale discovery tool developed by Serials Solutions.¹²

Overall, UL had already been experiencing a decrease in the number of questions answered by reference and circulation desk staff. Of course, the experience at GVSU was mirrored to some degree by many institutions, or at least it seemed so. The 2008 article, “Whose Decline? Which Academic Libraries are ‘Deserted’ in Terms of Reference Transactions?”¹³ by Rachel Applegate presented an analysis of reference transactions reported through the Academic Library Survey (ALS) of the National Center for Educational Statistics in 2002 and 2004 to try and discern if the statistically and anecdotally reported decline was as steep as described in a *Chronicle of Higher Education* headline—The Deserted Library¹⁴ in 2001. While historic statistics available at GVSU University Libraries are not extensive, they do echo the same downward trends in the numbers of reference questions and circulation experienced by peer institutions around this time.

As data accumulated in LibStats, librarians at GVSU saw the possibilities for creating a richer picture of the use of the reference collection and services and provided more topics for conversations.

Talking about Reference

LibStats provided an opportunity for faculty librarian Tony Molaro to join with Administrative Professional and Manager of Reference, Linda Woods, to join together to examine the number and type of questions received during the fall 2008 and winter 2009 semesters. Molaro and Woods¹⁵ initiated an analysis of over 11,000 questions using a modified READ Scale (Reference Effort Assessment Data) to determine how many questions required the services of a librarian to answer. The READ Scale,¹⁶ developed at Carnegie Mellon University and first implemented there with a trial in 2003 was developed as an alternative to the traditional tic or hash mark system. It enables librarians to capture and record information about inquires or reference questions emphasizing the skills and knowledge and techniques and tools required to answer questions in addition to the numbers of questions. Gerlich and Bernard¹⁷ refer to the dissatisfaction with traditional hash mark systems that failed to record anything but the number of questions and did not necessarily reflect the time spent on a question. Using a modified version of the READ Scale with four ratings rather than six, Molaro and Woods found that at GVSU University Libraries only 377 of over 11,000

questions recorded for the time period they reviewed required a librarian to answer. In other words, 95 percent of the questions could be answered by a trained paraprofessional or student library assistant.¹⁸

Print Reference Collection Usage

Another conversation arose from an analysis of statistics collected using LibStats for the Winter 2009 semester leading to the conclusion that of the 4407 questions recorded for that semester, only 249 related to a reference source. Further analysis¹⁹ by librarians Doug Way and Colleen Lyon of University Libraries uncovered that of the 249 reference-related questions, 51 involved online sources. Librarians referred a patron to a print source for only 70 of these reference questions and only 172 of questions involved a student patron requesting a source. At the end of this short-term, but thought to be representational study, Way and Lyon concluded that approximately 46 percent of the questions referred to dictionaries, citation questions, or assignment-related sources.²⁰

Another project initiated was re-evaluating the existing print reference collection based on usage statistics in the Millennium ILS system and a review of the LibStats data. The re-evaluation resulted in “Reference: A Moving Experience” project conducted over the summer of 2009 when the majority of the print reference collection was re-located to the appropriate area in the circulating collection based on some specific criteria established by the Head of Collection Development. Librarians looked at usage, currency, and type of resource for the LC call number areas relating to their liaison areas and recommended moving a majority of the print Reference Collection. As an aside, a percentage of the resources formerly shelved in Reference (library use only) have circulated at a slightly higher rate than print items that have always circulated. This observation, to be examined in the future, offers anecdotal evidence (so far) that re-locating the resources has resulted in greater usage or patron service.

At the same time UL implemented Millennium, LibStats, and conversations, both formal and informal, were going on within the library. In preparation for a new building a working group whose members included librarians, APs, and directors from Public, Access, and Research and Instruction services met regularly for almost a year to brainstorm and visualize how reference and other services could be provided

in the new Pew Library slated for completion in 2013. Members of the working group discussed models that ranged from big-box stores to bowling alleys and concluded with a recommendation of a single-service point where library patrons could ask questions in addition to checking out materials, picking up holds, etc. and be referred to a librarian if additional assistance or a consultation was needed or desired.

Talking about Reference Conversations with Librarians

After reading material²¹ related to the webinar “Is Print Reference Dead?” facilitated by Sue Polanka, the team of ten librarians who work at Zumberge Library a follow-up conversation regarding favorite print reference materials spurred a discussion that quickly led to looking at differences in what librarians now learned in graduate school classes on reference services. As part of the research for their 2008 article on how instruction skills were not being taught in library school, Claudene Sproles, Anna Marie Johnson, and Leslie Farison surveyed fifty-four ALA-accredited library and information service programs in 2007. They determined that for thirty-nine of the forty-five MLIS programs (72.2 percent) for which they received information, the reference class is required. Yet an informal discussion amongst ten librarians with completions dates for library school ranging from the 1980s up to the mid 2000s the reference experience was very recalled in different ways. Not everyone had been required to take a reference class and when asked to name their favorite print reference resource the newer librarians (those who completed the masters mid 2000s and on) tended not to have a print favorite. They reported that they had simply not learned reference using print materials which was a very different experience than that shared by those who attended library school prior to 2000. The librarians who had graduated earlier shared tales of reference classes that required developing familiarity and expertise with a large number of print reference sources. Titles mentioned as favorites included *Statistical Abstract of the United States*, *Oxford English Dictionary*, and *Brewer’s Dictionary of Phrase and Fable*.

While only anecdotal evidence of varying reference education, conversations like these aided in appreciating the differing attitudes and experience shared among the team of ten librarians responsible for providing reference services at Zumberge Library.

While this conversation was informal, it did seem to explain why we were seeing a decline in the use of the print reference collection but also differing attitudes among the ten librarians in how reference service was delivered.

What We Didn’t Talk About

One conversation that didn’t take place that may have aided in understanding about how much time had been gained for librarians was a discussion of the number of hours librarians were scheduled to be “on the desk” over time. Librarians who joined University Libraries after the mid 2000s when experimenting with support staff and students working at the Reference Desk was routine don’t feel that they’ve gained much time by not working at the Reference Desk. By January 2010, most of the ten librarians were schedule for the Reference Desk from 4–7 hours per week rather than the longer and more frequent shifts experienced by colleagues serving at GVSU longer.

Results of the Re-Invention

There were a great many conversations held about reference services before initiating the “librarianless,” single-service point at Zumberge Library in January of 2010. The detailed evidence collected using LibStats made it harder for librarians to demonstrate that their presence at the desk was required to deliver effective services. Moving to a single-service point was never about a cost savings at GVSU but rather about delivering high-quality service and helping librarians re-purpose some of their time to develop expertise and skills in working with the institutional repository and with classroom faculty on incorporating information literacy into their curriculum in a meaningful and effective way. It also offered opportunities for COTs and APs to develop new skills.

In the end, the single-service point came to be known as the “Service Desk” and ways of assessing effectiveness and delivering staff training and development are still under discussion due to changes in key positions in a number of departments. The former Reference Manager initiated a training program for students that includes librarians in delivering some of the content and is envisioned to evolve to regular shared sessions for librarians and support staff.

Librarians and administrators at University Libraries learned a good deal along the way to initiating the single-service point. The same flexibility that

enabled quick movement to trial this new way of providing reference service will allow for the process to respond to changes in University Libraries over the next few years with the goal of getting things as right as possible for the Pew Library opening in 2013.

Notes

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