



Assessment Annual Report

Service or Collection

Reference Services – Valley Library

Fiscal Year

FY24

Overview

Reference services are delivered in-person, by chat, phone, text and email, including in response to problems reported through a form in the discovery tool. These services fall under the Library Experience and Access Department's (LEAD) portfolio of services, with the Coordinator of Reference Services as the primary contact. The Coordinator manages both the in-person and virtual reference services (drawing on library employees across several different departments to complete the roster of chat service hours). Students, classified staff and faculty provide the staffing for the in-person reference services located at the Borrowing and Information Desk, our new single point of service.

During FY23 and FY24, LEAD professional staff and student employees provided reference services for students, employees, and the general public during all open hours (106.5 hours per week across all seven days). For 38 of these weekly hours, we also provide chat reference service. In previous years, reference services were typically provided from the Information Desk. During the summer of 2023, LEAD launched a singular, in-person, combined service point, the Borrowing and Information Desk.

Strategic Significance:

The OSU Libraries Reference Service connects most strongly to OSULP Strategic Goal 1, as reference service staff strive to provide *High Quality Services and Expertise* to all library patrons. In delivering this service, we are operationalizing Strategic Priority B.1, an external-facing priority that focuses our efforts on *Optimiz[ing] the library experience in support of learning success, scholarly excellence and community engagement*. Our service staff includes student employees who utilize their deep knowledge of campus culture and systems to connect other students to university resources. We also train these students to answer basic level reference questions using a myriad of library-based information resources. Librarians and Classified Staff provide expert services for in-depth inquiries ranging from the nuances of 3D printing to appropriate discipline-specific information resources to best practices for literature reviews and everything in-between. For OSU's next strategic plan, this service aligns well with Goal 2: *A University Where Every Student Graduates*.

Takeaways:

- Takeaway 1: The Borrowing and Information Desk significantly changed the philosophy and practice of answering and recording reference questions. In previous

years, all transactions at the Information Desk had to be manually tracked because employees conducted services from the patron side of our ILS. Employees at the Circulation Desk were not typically recording transactions in LibAnswers. Now at the Borrowing and Information Desk, circulation interactions are automatically recorded through the backend of the ILS and all other transactions are now recorded in LibAnswers. This has affected the number and type of interactions recorded and some effort still needs to be made to ensure consistent recording of transactions.

- Takeaway 2: Having a single point of service has been helpful for all library users as they don't have to guess which desk is appropriate to ask their questions. Basic reference questions no longer have to be walked over to another desk, where the reference interview has to start all over again. The new desk and printer configuration seems to have led to less confusion for our users as reflected in the decrease of directional questions between this year and last year.
- Takeaway 3: Training all sixty employees who staff the B&I desk to a beginning level of reference interviews and search strategies has been extremely challenging. After some strategic changes in employee focus which were implemented and supported by our new department head, everyone's level of confidence and expertise has increased. LEAD must continue to focus on this path moving forward to meet the information needs of our users.
- Takeaway 4: The creation of the Reference Action Team (RATs) has already helped in brainstorming and implementing needed adjustments to improve service for our patrons and experience for our employees. Given how helpful our patrons find reference services (see below) and the amount of employee time and expertise we spend staffing it, the team thinks it will be worthwhile to continue our efforts to improve, promote and work to increase usage of this valuable point-of-need service.

Key Decisions:

In order to improve user experience and alleviate staffing shortages, we fully implemented last year's key decision to create the Borrowing and Information (B&I) Desk. Implementation of the B&I Desk also led to some difficult challenges. We made numerous decisions to iterate and change as we launched the new single service point.

We found that at the combined service point we were overwhelmed by circulation and study room transactions and therefore the department's greater focus was on these services. Additionally, only three of the 13 LEAD employees were fully trained in providing reference services at the Valley Library, so most did not feel as prepared or practiced in reference transactions. So we made the decision to start the Reference Action Team with members from multiple departments with the charge *to enhance the visibility and effectiveness of reference services by training and supporting library staff, faculty, and students*. This group has helped us implement a reference training program for new and existing employees. The RATs have also been working on cleaning up our FAQs and other key documentation. The group will also discuss and evaluate changes made across library platforms and how it impacts our users' access to resources. Future assessments and decisions will continue focusing on the improvement of the user experience.

After several months using the new service desk configuration, we noticed that the new service points were awkward for longer and more complicated questions. Staff were also not given the opportunity to work on these types of questions because they typically staffed a desk further back from the main service points. The RATs discussed these issues and decided that starting Spring Term we would experiment with changing one of the front, student-staffed stations to a staff station and provide a chair for a library user. We will continue this staffing model through this academic year and plan to assess this decision by

surveying employees on their confidence in answering more complicated reference questions and their ability to spend more time and feel less rushed in working on lengthier transactions.

Another challenge that arose due to the combination of service points is that LEAD students now need to be trained on an overwhelming amount of procedures related to circulation, reference, emergencies, building tasks, etc. As a result, we decided that LEAD will no longer fund and hire students to also staff the Undergrad Research and Writing Studio (URWS). It did not seem reasonable to expect students to learn all LEAD and URWS processes in addition to their coursework.

Last summer we also implemented the relocation of the library printers closer to the service desks, which likely led to our decline in directional questions (Figure 2), which previously regularly included showing people where to find the printers. We have also been working on improving printing-related signage. These are both examples of decisions that have reduced barriers to library navigation and use.

Finally, reviewing LibAnswers data revealed that we had nearly as many reference transactions 5-6pm as we had 10-11am. We'd also had discussions with URWS about how to best refer students to our research help and one idea was to align our chat hours more closely with their drop-in hours so chat service could be a consistent in-the-moment option. So we made the decision to expand our chat hours to be open until 6pm on Monday to Thursday.

Next Steps:

With the recent retirement of a very experienced reference librarian, our first goal is to rework the open position in LEAD (preferably as a faculty position) and then hire an employee to collaborate with the Reference Services Coordinator and the Reference Action Team to focus on the continual improvement of reference services, either virtual or in-person, and balance the department and workloads.

The Reference Action Team has also recently drafted the following goals.

Short-term:

- Train LEAD employees in procedures, strategies, and best practices for responding to basic and moderately complex reference questions in multiple formats at least once per term.
- Create criteria for how we use FAQs, and create a plan to migrate the FAQs to their appropriate locations.
- Appoint a RATs liaison to key groups such as Collections Council and the Outreach Committee.

Long-term:

- Increase the amount of reference transactions occurring at the Borrowing and Information desk.
- Implement user-experience assessments to inform and iterate best practices.
- Build relationships with both internal and external groups to keep a reference mindset.

- Create and implement a marketing plan, including services to patrons (external-focused) and talking to people about the work of our group (internal-focused).
- Create a shared understanding of reference topics and supporting documentation.
- Investigate options for rejoining Answerland.

Assessment:

The integration of circulation and reference services into a single service point created improvements in user experience and staffing levels. Most of our evidence of improvements to user experience is anecdotal but staffing improvements are more concrete. Despite open positions and extended medical leaves, LEAD employees were able to take weeks-long vacations (some for the first time), more employees were able to schedule work-from-home days, and we were able to allow multiple employees to attend conferences together. Additionally, it was much less common for employees from LEAD and other departments to need to work outside their typical schedule to cover absences.

The UX librarian collected some data about the Borrowing and Information Desk using the Tiny Cafe format ([Cafe1](#), [Cafe 2](#)). While these examples don't explicitly assess reference services, they do show that user impressions were generally positive about the new desk arrangement and services, but users would have liked more details on the services and items we provide. As a result, we have created new Library of Things brochures and will soon print and hang a menu of services offered at the B&I Desk.

LibAnswers software allows us to record and analyze the various details of our recorded transactions. For example, Tuesdays are our busiest day for questions, 1-2pm is our busiest hour, and October is our busiest month. By reviewing this data, we were able to make informed decisions about desk and chat staffing.

We were also able to learn that recorded transactions of all types rose nearly 11% from 2022-23 to 2023-24 (18,813 to 20,855). It is important to note that many in-person and phone transactions are missing because they must be recorded manually. We are not sure what accounts for the 10% decrease in chat transactions over the past year.

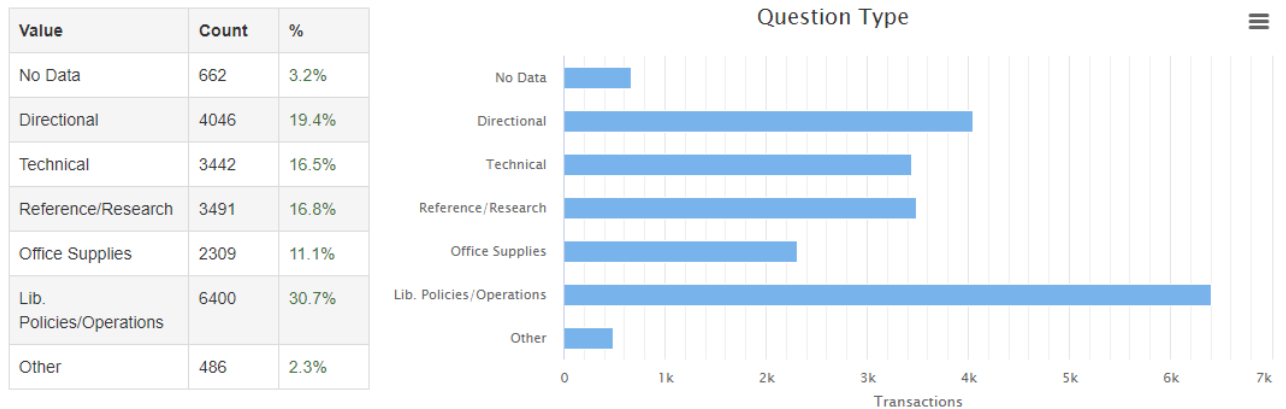
Figure 1:

LibAnswers Analytics comparing 2022-23 to 2023-24:

Contact Type				
Year	Walk In	Phone	Email	Chat
FY 23	14583	1206	762	1544
FY 24	16121	1599	905	1389
% +/-	10.547	32.587	18.766	-10.04

The consolidation of service points likely led to an increase in all recorded in-person transactions, including a 43.5% increase in library policy/operations questions (from 2786 to 6400), due to circulation staff being asked to regularly record these transactions in LibAnswers for the first time. Directional questions fell by 28% (from 5638 to 4046), mostly attributed to the relocation of the printers.

Figure 2:
Question Type



Another interesting area to analyze is in the differences between in-person and chat transactions. While students have accounted for about 75% of all transactions for the past two years, when broken down by modality students appear to represent a much higher proportion of in-person vs. chat transactions. Although this is not certain given the large percentage of transactions with an unknown patron type. Monitoring this type of data might prove useful as we create and implement our marketing plan.

Figure 3:

	In-Person	Chat
Student	85.1%	48.9%
Faculty	2.4%	18.9%
Public	6.9%	10.6%
Unknown	9.2%	20.6%

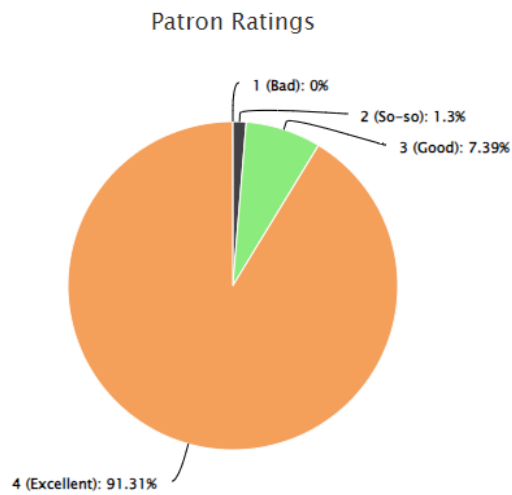
It is also interesting to note that when the transactions are narrowed to Reference/Research only, it appears that the number of in-person reference transactions per hour is similar whether in-person or on chat. Reference transactions on chat tend to be longer than in-person, with 59% lasting more than five minutes as compared to 25% at the desk. However, it is unclear whether we are using the same criteria for recording transactions across our departments and service points, so we plan to make an effort to more carefully train employees in using LibAnswers.

We informally assessed our staff about their confidence levels on certain reference skills and tools by using anonymous Google surveys. Based on the results, we are continuing to

develop and implement reference and information literacy training for our staff. We will continue to conduct assessments to measure improvements and outcomes.

Finally, we continue to see positive feedback from our chat patrons. Of the 397 chat patrons who chose to respond to the end of chat user satisfaction survey, 91% rated the service they received as excellent, 7% chose the second best option (good) and only 1% of chat patrons were dissatisfied with the service. We are also considering how to best gather feedback for our in-person reference service.

Figure 4:



Respectfully submitted,

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Signature of the person (or persons) who prepared this report

10/1/24

Date submitted