Recommendations

- Continue this model of service for reference support for 9 am - noon.
  - Reference coordinators will oversee the service model, including updates for librarians and desk staff about procedures.
  - Continue collecting data in the Fall 2013 semester.
  - If the fall data collection indicates that recommended practices have been incorporated into staff workflows and that this service model meets user needs, data collection can be discontinued.
  - If the data indicates problems or gaps in adoption of practices or in the level of service provided, determine next steps.
- Continue to improve and optimize the service model.
  - Share report and discuss experiment with librarians and service desk staff.
  - Improve understanding of librarian availability with data collection and reporting.
  - Use results of discussions with staff to help even out the demands on individual librarians.

Conclusions

- The morning reference support experiment generated more interactions between the service desk and librarians than the Fall semester morning on call experiment.
- Demand on any individual librarian was modest. The average number of contacts for the most heavily contacted librarian was 3x per month.
- When the service desk sought help from librarians, they were successful in all but two reported instances. On some occasions, the desk person had to try a few people before getting someone who was available.
- All of the reported contacts from the service desk were for transactions that referrals would be expected.
- The librarians handling the desk referrals were generally able to help the user or point them in the right direction.
- Actual activity was underreported, both from service desks and by librarians, but it is not known by how much.
- Librarian availability via IM improved during the experiment, in the number of individuals who were available, more generous listing of availability, and the resolution of various technical problems.
Morning reference support experiment 8/2/13

- Areas for improvement:
  - Librarian adoption of recommended IM practices.
  - Service Desk staff in their practices in identifying and contacting available librarians.
  - All staff in reporting transactions.
  - Data collection that indicates actual availability of librarians on IM.

**Background**
The Morning Reference Support experiment (January – June 2013) implemented a model for synchronous on-demand reference service, to be provided (in most cases) by local librarians.

The effort built upon the Fall 2012 Morning On-Call project, in which librarians from the Ask Us! team were scheduled for reference support weekdays from 10-12. A triage approach was used, wherein team members provided direct assistance and also made referrals as necessary when subject specific expertise was required. This was a well-crafted project, but the level of procedural complexity was high, and the level of activity insufficient to justify continuation of this model.

For the spring term, morning reference support for service desks was provided on-demand and in person by local librarians who already participate in reference support. When a reference question was presented to desk staff, in person or by phone, the staff member used Instant Messenger to identify an available librarian, and contacted the librarian (either with IM or by phone). This approach required:
- a commitment on the part of librarians to be available, whenever possible, for referrals from local desk staff;
- an understanding, on the part of both librarians and desk staff, of procedures for the use of Instant Messenger as a tool for indicating librarian availability, and a commitment to observe those procedures. Considerable attention was given to this facet of the project.
- An understanding on the part of service desk staff of established referral practices, as well as referral procedures specific to this project.

**Data Collection**
**Desk staff input:** Service desk staff were asked to complete a brief online form for each problematic attempt to obtain librarian assistance, indicating:
- the question
- what happened in the attempt to contact a librarian
- what help was provided to the user.

**Librarian input:** Librarians were asked to complete a form for each referral received, indicating:
- the question
- actions taken
- if referral to a subject specialist was needed, what expertise was required
- any further comments, including any problems that occurred.

**Librarian availability:** For 6 weeks, beginning in March, librarians’ availability as displayed on Instant Messenger was monitored. See below for a description and results

**Results**
**Librarian reports**
- Librarians reported 79 transactions for the semester, averaging just under 4 transactions per week.
Breakdown of transactions by location:
- Hayden: 38
- Dewey: 23
- Rotch: 17
- Barker: 1

There are 29 librarians with desk support roles. 18 of the 29 reported contacts from the desk during the sample period. 7 of the 29 librarians reported 5 or more contacts, with the most contacted person reporting 16 contacts during the sample period (~3 per month).
- Barker – 7 librarians on IM, 1 contacted (only one reported call during sample period).
- Rotch – 7 librarians on IM, 6 contacted.
- Dewey – 5 librarians on IM, 3 contacted.
- Hayden – 10 librarians on IM, 8 contacted; 4 librarians in other locations also contacted.

- In the majority of cases, assistance was provided in-person.
- 75% of the time, the librarian contacted provided a full or partial answer.
- There were 10 reported instances in which the librarian provided a referral to someone else; in 3 of those cases, the user was referred to a subject specialist.
- As is the case during scheduled on-call reference, the nature of assistance provided covered a broad range, from brief to in-depth. For 32 of the transactions, the librarian involved posted a comment – more information about the question itself, about how it was handled, or issues encountered. Although it would be hard to extract a single theme from this feedback, the 5 comments related to communication via Instant Messenger suggest that, if this service model is adopted, reinforcement of the IM procedures would be advisable.

Desk staff reports
- Over this 5-month period, service desk staff reported 7 instances in which some issue arose in the attempt to obtain librarian assistance. In 4 of those cases, a librarian was found (after one or more unsuccessful attempts) and did assist. In one case, the IDLA staff member was able to get the user started with relevant online resources (with the benefit of local information service training), and also provided a referral for follow-up. In the remaining cases (patron having trouble finding a book in the stacks; patron seeking the location of an instruction session), the IDLA staff member provided assistance.
- 6 of the issue reports originated with Hayden, 1 with Dewey.

Librarian Availability
Reference Coordinators checked which librarians were listed as “available” in Yahoo IM at 3 different times (9:30am, 10:30am and 11:30am) on different days during a 6 week period, in March and April. This sample period, a month into the Phase 2 experiment, allowed librarians plenty of time to adopt the IM procedures. Sampling measured availability as listed in a person’s IM status. Individual availability patterns were not sampled, only the number of ‘available’ librarians at each location. Librarians were not prompted to respond. There were some inconsistencies in who was counted in each location, with some overcounting in Barker and under-counting in Rotch. System-wide, 37% of possible reference support staff/librarians were listed as available during the sample period. Barker’s recorded level if availability was lower than the other 3 locations. If Barker was taken out of the equation the overall average would be 41%.
- There were 12 instances where no one available on IM in a specific location. Half of these occurred in Barker.
- There were 31 instances of only 1 person showing available on IM. 14 of these were in Barker.
**Group Charge**

**Phase 2 experiment (February – June, 2013)**

- Covers 9 am - 12pm
- Librarians are not scheduled for specific hours, yet all librarians who are on location are expected to provide assistance to library users who seek help at the service desk (in person or otherwise).
- Instant Messenger will be the primary tool to indicate availability, and an option for contacting users.
- RMS will charge a group to:
  - Set minimum expectations for staff who are involved with desk and user support.
  - Universal use of IM, standards for software settings, practices for indicating availability
  - Expectations and practices associated with being unavailable.
  - Conventions for identifying and contacting librarians.
  - Backup strategies when no one is available.
  - Design and implement a data collection strategy about queries and referrals.
  - Design and implement a sampling strategy to monitor IM availability during morning hours.
  - Evaluate the experiment to determine if this approach is an effective and cost effective model for supporting library users.

**Team:** Angie Locknar (LDLC); Howard Silver (IRS), Anita Perkins (IRS), Maria Rodrigues (IDLA)

**Experiment Duration:** February 4 – June 30, 2013 (spring term)

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### Librarian Availability

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<th>Time</th>
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<th>Rotch</th>
<th>Dewey</th>
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*Cassandra Silvia* | Jennie Murack | Kate McNeill | Erja Kajosalo

Darcy Duke | Lorrie McAllister | Maggie Bartley | Howard Silver
Lisa Horowitz | Peter Cohn | Mark Szarko
Remile Green | Sharon Smith | Michael Noga
Stephanie Hartman | | Michelle Baldon

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* *Should not have been counted, wasn't consistent*

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**Summary of Librarian Responses & Summary of Desk Responses** – separate attachments

Data files posted on the Reshaping Mediated Services Wiki

https://wikis.mit.edu/confluence/display/MEDIATEDSERVICES/Morning+Reference+Support