McKeLDIN Merged Desk Report

March 28, 2014

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# INTRODUCTION

In December 2013, the Public Services Managers charged the McKeldin Merged Desk Subgroup to assist with the planning for a single service point on the first floor of McKeldin Library. The group shall review the operations of the Circulation, Information and TLC Tech Desks and produce a report that includes the following:

- Recommendations for a service model at the 1st floor service desk.

- Develop complete schedules for all suggested models, as if we were implementing them.

- Do we need a separate TLC?

- What is the role of librarians at the desk(s)?

- What are the training needs for staff at each desk (dependent on the service model recommended above)?

The appendices section contains the charge.

The report is due to Cinthya Ippolliti, Yelena Luckert , and Tim Hackman by 5pm Friday, March 28, 2014.

The charge was revised in January 2014 to focus the report on the new desk scheduled for 2015/2016. Initially the members of the group were to also look at merged desk for the first floor after a redesign/construction on the Access Services Desk. It was decided that the Access Services Desk would not have a redesign or construction.

# PLANNING

To start the planning, the group members read the *Study of the Libraries’ Information and Research Services* (2011) to review the data collected and the staffing, technology and physical space recommendations given by the committee.

A literature review was completed using the terminology merged, consolidated, hybrid and integrated as key words. A few key articles were:

1. Sheffield, K. M., Silver, S. L., & Todorinova, L. (2013). Merging Library Service Desks: Less is More. Advances in Librarianship, 37, 155-174. doi: 10.1108/S0065-2830(2013)0000037011
2. Ward, D. d.-w. i. e., & Phetteplace, E. e. c. e. (2012). Staffing by Design: A Methodology for Staffing Reference. Public Services Quarterly, 8(3), 193-207. doi: 10.1080/15228959.2011.621856

In the literature review, a common theme was transaction analysis of collected data from systems such as Desk Tracker, Ref Analytics, etc. to more effectively implement staffing of service point(s). A general consensus among the articles is that the reallocation of the reference librarian’s time away from the desk is occurring. This is due to the diminishing reference transactions and the changing role of the librarian which is increasing outreach/engagement with faculty and students.

A test trial of the merged desk was done during the morning hours/Saturdays in Fall 2012 and Spring 2013, with a pre and post trial survey distributed to the staff of Access Services and Information Services. The members of the subgroup reviewed the survey results. Commentary from the survey was relevant:

The staff that participated in the merged desk trial agreed that merging the two desks together provided better service to our patrons, but they had same caveats and concerns, as well.

The greatest improvement that was observed was that patrons got all of their needs met in one central location (e.g. reference assistance from a librarian, circulate books, help using a computer/printer, etc.). In fact, one person stated, “it… [got] rid of the tendency for patrons to bounce between desks until they {got} all of their needs taken care of”. Furthermore, many staff members indicated that they were happy to have a more complete knowledge of their counterpart’s position, but they also indicated a desire for further and more structured cross-training.

However, in the trial there were a few drawbacks. Some staff observed that “closing” a desk caused confusion on the part of patrons to the point where they did not think circulation services were available on weekends. Staff indicated that improved signage and overall better communication with patrons might alleviate this. Albeit, this will not be an issue once there is only a single desk that provides all services. Another point of concern was making sure students were included in the process as they are essential to the work being done in the library. This would mean that they would have to be cross-trained (both in policies and procedures and expectations).

Overall, the staff were happy with the services that they were able to provide thanks to the merged desk, but they would feel more confident with a clear and structured plan.

Statistics collected were as follows:

* McKeldin Information Desk transactions for the time period of 1/1/2013 through 12/24/2013 in RefAnalytics provide the following information:

1. Monday – Thursday have the higher transactions per week.
2. Peak hours for transactions are 11 a.m. – 4 p.m. on Monday-Thursday.
3. September, October and February are the months respectively with highest transactions.
4. Complex research assistance with read levels 4 -5 (not including consultations) resulted in 146 questions for the year. The total number of all transactions for the year was 15,819. Peak hours for transactions are 11 a.m. – 4 p. m. on Monday – Thursday. The peak months are September, October, November, January and April.

* Access Services Desk transactions:

1. More than 382,000 circulation transactions (loans, returns, and renewals) at McKeldin in FY13. At this time, a break down by hours or month are not compiled.

* TLC transactions.

1. More than 125,000 transactions (loans and returns) of equipment in 2013 at McKeldin. Up from more than 74,000 in 2012.

* Digital Systems and Stewardship (DSS) transactions:

1. DSS tracks the calls received but does not record data by units/divisions, such as PSD, McKeldin Information Desk, etc.

# SERVICE STRATEGY

The recommendations in this report are based on current services offered on the first two floors of McKeldin and how they might be improved by a new dynamic staffing model. The assumption is that the new models will provide more efficient and effective levels and types of services and how they are provided. Staff at the new 1st floor service desk will be trained and proficient in basic catalog assistance, circulation services, copy, scan and printing general directional and referral services, and first tier response to IT questions. DSS will continue to offer second tier support to desk staff working with patrons and their technology needs and questions. The strategy of this reconfiguration should be based on the shared goals of the units involved. It is recommended that the involved units conduct strategic planning together to drive the improvement of services and workflows. Due to the design for the new desk, TLC Desk services should remain on the second floor.

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# TLC DESK

The primary reason the TLC Desk should remain on the second floor is that the requirements for the new desk and first floor were given to the design firm to accommodate Access and Information Services staff, workstations, and space – with the plan that equipment loan would move to the 2nd floor TLC Tech Desk.

If Tech Desk services relocate to the first floor, the current design for the new first floor desk would have to be revisited to accommodate Tech Desk staff, equipment, and space for services including faxing, binding, laminating and Terrapin Express. A secured environment for equipment in the loan program would also be required. A list of TLC services is in Appendix B.

Additionally, if Tech Desk staff relocated to the first floor, there would still be a need for staff on the second floor to handle the considerable activity associated with TLC events and workshops, Terp Training, and group study room reservations.

After lengthy discussions, the subgroup recommends for the new desk the Two- Desk Model.

# DESK SERVICE MODELS

For the Two-desk model, the first floor desk is either merged or hybrid. Either one is viable.

**Merged**: Staff for first floor desk are fully cross-trained for information and access services. Second floor desk staffing and services remain largely as they are now, but with limited cross-training between floors.

**Hybrid:** This model is a mixed of a co-located and merged desk model.The current design of the first floor desk does not lend itself to a true co-located model with visually separate services.The hybrid model will include a co-locational aspect with administratively separated staffing and training. The merge element is the patron walking to the desk and asking anyone at the desk his/her question – there is not demarcation of signage separating the services. Staff/students for first floor desk are cross-trained on the minimum core competencies for information and access services.

After deciding on the two –desk model, the advantages of a merged vs hybrid desk were discussed.

**Merged**

*Advantages*

* Convenient for the patron; one stop for many services, less referrals for simple transactions
* Knowledgeable staff trained to

answer the diverse questions

* Cohesive team (no silo effect)

*Disadvantages*

* Extensive training to learn different

services

* More referrals to staff experts for specialized services or complex issues

**Hybrid**

*Advantages*

* Easier transition for staff
* Extensive training to learn other

services is not necessary

Less referrals to staff experts for specialized services or complex issues

* Convenient for the patron

*Disadvantages*

* Separate locations result in less cohesive team (silo effect)
* More communication is needed between the locational staff to maintain efficient operation of services

# STAFFING

## Role of DSS

Digital Systems and Services (DSS) envisions being at the desk for at least 2-hour segments or on call. Initially, this unit views its participation as being on call. This is subject to change dependent upon a RG approval of the L&A budget request. In the unit scheduling templates, DSS is listed as on-call. It is imperative that individuals assigned as on-call to the desk provide a fast turnaround time to resolve issues and troubleshoot. Lync on desktop or mobile devices or phone will be used to contact the DSS staff member assigned to be on-call. If personal assistance is required, the staff member reports to the desk to help immediately.

Questions received in DSS for assistance either from TLC desk, Circulation Desk or Information/Reference Desk are as follows:

* Assistance with hardware and software issues with laptops student check out in the Libraries for both MAC and DELL laptops.
* On a case by case basis, we help with student out with their private laptops.
* Assist with questions regarding the hardware and software issues for public machines – MAC and Dells
* Receive questions about network for the public machines and the public printers
* Questions about hardware and printing with HP printers – Pay4Print printers
* Request for assistance with 3D printer in that area
* Request for assistance with poster printing for the students if a problem would arise
* Request for assistance with the hardware and software problems with the (4) Information Desk staff computers
* Need assistance with paper jams, hardware and printing issues with (4) Canon MFPs – Pay4Print printers on 1st Floor
* Need assistance with hardware and software problems regarding the MAC s on 1st & 2nd Floors and Dell PCs on 1st, 2nd, 3rd, 4th, 5th, 6th and 7th floors
* Questions about why the Wi-Fi (wireless) is not working in the building
* Request for assistance with network issues for a single (1) PC or a group of public PCs
* Received request with problems with CSVTs – Copy Card ATMs – hardware
* Need assistance with Pharos remote software (software that staff can use to transfer print jobs to any of the Pay4Print printers on the lst floor)
* Need assistance with hardware and software problems with the circulation desk computers
* We receive questions about Aleph not functioning properly at the circulation computers
* Problems with the ILL webpage on the Libraries webpage
* The receipt printers at the Access Services Desk not printing out receipts book return.
* Circulation desk computers not connecting to the network

These are the type of questions DSS (on-call) or *on desk* would receive from the first floor desk for assistance.

During the fall 2013 semester, DSS students worked at the TLC Tech Desk to enhance technical assistance during the evenings when DSS was closed.

## Role of Students

A key point in the effective operation of the one-model first desk is the recruitment and *hiring* of students with communication skills, technologically skills, and a patron service background, especially in library environment, if possible. Common skills should be included in job descriptions.

Students and staff must meet minimum expectations for service by being knowledgeable in the following (for either hybrid or merged model):

* Circulation loans/returns
* ILL Loans/returns
* Holds and accounts
* Assigning guest passes
* Reserves
* LibAnswers and RefAnalytics
* Navigating UM Libraries web site for information question
* Directional Questions
* Navigating Research Port
* Referral process to UM Librarians
* Troubleshoot equipment
* Pharos and printing system – be able to print page for the patron, if needed

In the training section, a more detailed outline of minimum expectations is given. Training of undergraduate/graduate students will begin in *August 2014.*

Students, particularly iSchool graduate students, are key to evening and/or weekend operation with the librarian’s absence on weekends and late evening hours. iSchool students with at least one semester of course work, including the core reference course, will be recruited. A mutual agreement to work for one year should be part of the hiring conversation.

## Role of Staff

The staff will be the welcoming “face” of Mckeldin Library. Perceptions of library service by the patron can be affected by the initial interactions. The staff must be knowledgeable, confident and welcoming to the patron. The staff will also be the student workers’ role model and contact for questions arising at the desk, which need additional assistance.

To gain the knowledge and confidence, the assigned staff for the desk must meet the minimum expectations. Cross training for the minimum expectations has been a pivotal component of the cross training of Access Services and McKeldin Information Services staff that occurred in 2012 and 2013. Cross training of staff must continue in an organized manner with practical hands-on experience and required workshops. At this time, having the staff switch desks during low peak times and working together on one desk on weekends and/or late evening hours will enhance the training.

An additional role of the staff on the desk or on-call is the participation or monitoring of chat --with administrative approval. The subgroup recommends that the chat coverage be initially during hours of operation, excluding Late Nite.

Questions will arise on the desk, which require staff experts. Staff experts in microforms/ periodicals, ILL, course reserves, and pharos system when not on the desk, will be contacted via Lync or two-way radios and headsets when questions arise requiring his/her expertise.

## Role of Librarians

Librarians will be moving away from physical desk coverage to an on-call status.

Based on RefAnalytics, librarians will be on-call from Monday – Thursday 11 a.m. – 7 p.m. On- call is defined as being available to come to the desk or via Lync to answer reference/research questions during his/her designated shift. Librarians will not work weekends. The only time periods that the Librarians will be on the first floor desk is the *final two weeks of a semester* and the *week of midterms*.

With the librarians on call, there are library technicians with advanced degrees, who have an understanding of the research process: Elizabeth Larson (MLS), Judith Kidd (MLS), Erica Lambert (MLS), and Evelyn Yocco (MLS), Mohammed Jaleel (MLS), Michael Zeliff (PhD, English literature). Weekend coverage will be under the supervision of Charles Wright, Coordinator (Information Services), and Mohammed Jaleel (Access Services) on Saturday. Sunday coverage has Michael Zeliff (Information Services), Lydia Savage and Mohammed Jaleel (Access Services). Staff members should be viewed in terms of expertise and assistance they provide and not be limited by classification.

Librarians will be an integral part of training the staff/students by having a representative on the recommended Training Committee and participating in required workshops for students/staff.

Librarians should be one group contacted to assess the operations of the new desk via a survey after a six month time frame.

## Further Recommendations

1. The Stacks and Shelving staff/students be cross trained on directional questions. It is important that all public services library staff provide assistance when asked and offer a welcoming presence throughout the building. Circulation and Information Services students can be trained on locating items from the shelf.
2. Kiosks are designed to assist the patrons with simple directional questions, locational questions, and printing questions. The kiosks will be located on each floor.
3. The hiring of iSchool student(s) to work weekends and/or evenings. A key concern is the resignation of the students, when he/she accepts GA positions within the campus and the UM Libraries. This needs to be addressed with possible solutions being either:

---Creating a Graduate Assistant position(s) for either unit (Access Service or McKeldin Information). The GA could participate in virtual chat, work on the web presence of the unit or other assigned tasks/projects.

---Requiring GAs hired in any public services unit to work evening or weekend hours as part of their duties/responsibilities. This would require administrative support.

---Offering a competitive salary to keep the graduate student.

## Fall and Spring Semester Schedule

Staffing for the Fall/Spring semesters for the recommended models is as follows:

 

The full schedule for a typical week in fall/spring as well as a comparison with current staffing can be found in Appendix C.

To better understand how the staffing decision was made, the members reviewed the data and looked at observations to provide a breakdown by hours of activities.

Access Services continues to have a high volume of transactions at the circulation desk. Although book loans and returns have decreased in recent years, book paging has essentially doubled the amount of holds put on the hold shelf. Book reserves have dropped as well, but the move to a new learning management system (Canvas) has led to more questions being handled at the desk regarding the Course Reserves system. Other patron transactions include issuing computer guest accounts, registering Community Borrowers, and resolving and triaging patron account issues.

Circulation and other statistics are not yet available by hour. However, anecdotally, the peak time for traffic at the circulation desk is roughly 10am-4pm during the week, with 11am-2pm being the busiest. The evening is not very busy, though we often get a burst of activity at the end of the business day in the 5-7pm range. The late evening is fairly quiet at the circulation desk, but it is also the time we currently pack our materials for shipping the next day. We usually have a staff member and student pack for about two hours each evening Sunday-Thursday. They are assigned to the desk but must do the work away from the desk due to the lack of extra staffing for these duties. So their absence from the desk must be compensated for by others. They are essentially on call during that time, but not designated as such. A merged or even hybrid desk model would provide opportunities for other evening staff and students to cover the desk while people are packing.

Information Services staff provide primary assistance with the online catalog and associated databases, as well as responsibility for assisting with the Periodicals and Microforms collections and microform scanners used to access this collection. They also provide assistance to patrons using the ninety-two computer desktops on the first floor, assisting with hardware, software and printing issues while using this equipment – and referring issues as needed to DSS staff. Lastly, Information Desk staff provides assistance with the seven multi-functional peripherals located near the desk, helping patrons with printing, copying and scanning. Historically, this staff has also covered the Welcome Desk, providing directional assistance to other sites and services within McKeldin Library, or elsewhere on campus. Directional assistance is also offered at the Information Desk. As with services at the Circulation Desk, there are peak periods of demands for these services – similar to those at Circulation with late morning thru the afternoon as being some of the heaviest time periods for these services. Evenings and weekends tend to be slower; however this fluctuates depending on the time of the semester. Summers are historically slow.

Digital Systems and Services (DSS) staffing decision is based on providing staff with services that are beneficial to situations that arise whether its on-call or face-to-face assistance. This is can change to 2-hour segments at the desk if an approval is made by RG of an increase to the L&A budget request.  DSS goal is to continue to provide great service to library staff and students as the need arises.

## Summer Scheduling

Summer scheduling is very similar to fall and spring except the reduced number of operating hours and student coverage. The summer is much quieter than the fall and spring and do not require the same number of student assistants per hour. Staff numbers at the desk are comparable to fall/spring during the week to ensure high quality service to patrons. The summer features many external groups visiting McKeldin, so service must be remain a priority throughout the week. Peak times are similar to fall/spring, but with much less traffic.

# ADMINISTRATION

## Hybrid

The staff person assigned to the service point on the desk is responsible for daily operation. Any questions on the referral process are handled by the staff person assigned. Two desk student supervisors from each unit schedule the students from one L&A budget. Each unit head handles the desk schedule for staff. In person complaints and suggestions are referred to appropriate supervisor. The desk coordinator handles training and oversees daily operations by discussing staffing and service concerns with the student supervisors, DSS, TLC and Circulation Coordinator. These people work with the Desk Coordinator but do not report to the Desk Coordinator,

## Merged

A core staff will be created by selecting staff from both units and reassigning into a new unit, e.g. Information Desk unit. The core Desk Staff is assigned to the first floor desk with a designated desk coordinator. The Desk Coordinator supervises the core Desk Staff and Desk Student Supervisor. The coordinator reports to the Information Services Librarian and handles training and oversees daily operations by working with direct reports and discussing staffing and service concerns with other contributing groups such as DSS, TLC, and Access Services. Staff experts, if not part of the core staff, are on-call and available for a limited amount of desk hours. The staff person assigned is responsible for daily operation during his/her shift. This staff person contacts backups or experts (periodicals, microforms, interlibrary loan, etc.), as needed. Any questions on the referral process are handled by the staff person assigned. The student supervisor working from one L&A budget will hire, assist with training and schedule students for the desk. In person complaints or suggestions are referred to the desk coordinator.

# TRAINING

A formalized training program needs to be implemented to ensure that all staff at the new desk are proficient in providing basic information and access services, copy print scanning support, as well as first tier support for technology questions. Cross training is a continuous process of workplace learning, on the job mentoring and formal training. Prior cross training between information and access services staff has focused on minimum competencies, aforementioned. Students have not been crossed trained.

A training committee should be established to implement these suggestions and create workshops. The librarians need to be invested in the training process and/or workshops. For either model selected, the Desk Coordinator is responsible for training. The coordinator will train regular staff, part-time temporary staff, and student workers on the minimum expectations.

To go forward with a consolidated desk, interactive on-line training modules need to be designed. A training group can be assigned to assist with the design of the training and providing the training. The students must be required to attend workshops.

For the hybrid model, the elements of the training program will be core minimum expectations. The merged model will include those as well as more specialized areas. Please look in the appendices for a more details on the training program.

## Training Timeline

The Desk Coordinator named by June 2014.

Training Committee (standing committee) established by July 2014. (membership: Desk Coordinator, Student supervisors, Stacks Coordinator, Access Services representative, Information Services representative, Librarian, Virtual Reference Coordinator [when appointed], Teacher and Learning Services representative, DSS).

The training committee will be responsible for the design and evaluation of training for the new desk.

Training needs assessment of current staff and students will occur by August 2104 to ascertain what needs to be addressed to meet minimum competencies. This could be done by survey or group meeting.

Deliverables:

1. One interactive online training module tested by February 2015. All online training modules completed by May 2015.
2. Four workshops by May 2015 recorded via Adobe Connect. Required attendance by students and staff.

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Assessment of modules, workshops and training is continuous.

The training committee can look at “Training the Trainers” or peer student training initiative, with graduate student training and mentoring the undergraduate student workers, as possibilities.

Mystery/secret shoppers could be recruited to test the desk’s efficiency in meeting the patron’s needs—with feedback from the shoppers to assist the training committee in redesign of workshops or highlight additional training needs.

As new services and resources develop, training should be continuous and reflect the evolving library environment.

# ASSESSMENT

The new desk and services should be evaluated for its impact on patrons. Assessment should consist of both quantitative and qualitative measures. Evaluation should begin before the transition to the new desk in order to establish a baseline. Comparing data from after the new desk implementation to the baseline will uncover any steps back in service as well as improvements.

ARL SPEC Kit 327 on reconfiguring service delivery reported most libraries surveyed used surveys for assessing service changes such as merging desks (Vyhnanek & Zlatos, 2011). Libraries also used comment cards and focus groups. Some of the libraries used their surveys to perform service gap analysis.

The subgroup recommends a combination of online comment forms and patron surveys. Online comment forms will allow patrons to take the time to compose thoughtful suggestions and submit their comments from anywhere. The online nature of the forms will also make it easier for staff to collect and use the information. This qualitative data should help support findings in the patron surveys and provide an easier alternative for patrons to give their feedback.

Patron surveys will be administered to analyze patron perceptions of service quality. The instrument should be a brief mix of quantitative and qualitative measures. The subgroup recommends using an instrument similar to LibQUAL+ but scaled down for our desk services. The custom survey would assess the gap in perceived quality of services. A simpler alternative would be University of Arizona’s action gap survey (Bracke et al., 2007). Their survey also looked at the gap in perceived service quality but asked the patron to rank the top five services most important to them, the top five the library did best, and the top five needing the most improvement.

Analysis of the gaps in patron perceptions will provide information needed for the library to adjust priorities and resources in improving services. As Arizona found, it is important that the library does not lose ground on how valued the services are by patrons. Assessment that compares to an established baseline will allow the library to strengthen reconfigured services where needed.

# SUMMARY

The subgroup views the staffing approach for the first floor desk model as a transitional process to a more efficient and agile service. The hybrid model enables administrative co-location of the two units while providing patrons a seamless approach to the desk with reduced signage and confusion. Cross training between Access Services staff and Information Desk staff has been occurring since 2012, providing a natural flow with less intensive cross training required initially. Further administrative changes and cross-training for a merged desk would provide increased efficiency in staffing and seamless service to patrons. With this in mind the recommendations are summarized as follows:

Recommendations 2014-2015

1. Merge desks during late evening hours and weekends beginning Summer 2014
2. Have librarians on-call beginning Summer 2014.
3. Name a desk coordinator for New Desk -- create description of responsibilities and duties.
4. Establish training group for design and implementation of programs//workshops and interactive online modules under the auspices of desk coordinator
5. Cross training for students/ staff for TLC.

Recommendations 2016-2018

1. Start with the hybrid one desk service model with desk coordinator in 2016.
2. Continue formalized training program for staffs/students for transition to merged model during first year of desk.
3. Select staff from both units to be reassigned to a core staff for new desk by Spring 2017
4. Merged Model with core staff on second year of new desk operation in summer 2017.

## Timeline

Phase One: Current Situation- Preparation for the New Desk

1. Information/Reference desk staff/students do the circulation/loan of books as of Summer 2014.
2. Librarians will not work the weekends in Fall/Spring Semesters.
3. Merge the desks on Saturday/Sunday as of Summer 2014. Merge the desks in evening hours starting at 7 p.m. Monday-Thursday, *Friday 5-8 p.m*. in Fall 2014.
4. Continue cross training and test the training by having the staff switch desks during low peak times in the morning or Fridays at different times during summer or winter semester.
5. Look into stack mapping to be incorporated into WorldCat monographic record so that patrons will be able to locate items in the stacks. This will address one of the frequently asked questions at the desk.
6. Define the desk coordinator and designate who is responsible for monitoring the operations of the desk. Look into how this position fits in the Virtual Reference Coordinator position, suggested by the VTIF report.
7. Name desk coordinator and members of training committee by end of June 2014. Interactive training modules to be created and workshops for training to be completed by Summer 2015.
8. Additional Lync training for staff.
9. Hiring three iSchool graduate students for weekend and/or evening hours*.*
10. Phase one ends with the identification and preparation of a new desk.

Phase Two: New Desk in Place (Hybrid Model)

1. Phase two begins with the prepared new desk.
2. Signage for new desk in place.
3. Marketing of the new desk and services with a web presence on UM Libraries suite and campus wide. Work with UM Libraries online coordinator, Aaron Ginoza.
4. Log requests received from the desk to DSS for assessment purposes.
5. Survey patrons or a focus group on efficiency of desk operations and the meeting the needs of the patron.
6. Assess use of self-check put machines.
7. Set up committee to look into designing/implementation of kiosks to address simple directional questions, printing questions.
8. Virtual training for staff, if administrative decision is made for staff to participate.
9. Assign core staff to the new unit for New Desk and student supervisor for the unit.

Phase Three: Second Year of New Desk – Merged Model

1. DSS on the desk for high peak times (if not located at TLC desk)
2. Continue assessment of patrons via suggestion box and surveying.
3. Kiosks on the floors to address simple directional questions, printing questions.
4. Additional self-check machines added to other floors in McKeldin Library.
5. Assessment of staffing model and scheduling.

Note: Timeframes were selected assuming construction of a new desk would start in Summer 2015. Depending on whether the current desks are renovated, the timeframe for Phase One could be reduced.

# APPENDIX A: The Charge

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Charge: The McKeldin Merged Desk Subgroup shall assist with planning for a single service point on the first floor of McKeldin. The group shall review the operations of the Circulation, Information and TLC Tech Desks and produce a report that includes the following:

- Recommendations for a service model at the 1st floor service desk. Are information and access services just co-located (i.e., retain their separate duties) or truly merged (i.e., fully cross-trained)? What role do DSS staff and students play at the desk? Do we need a separate TLC desk? – It would be good to come up with two or three possible models here and run down pros and cons of each.

- Develop complete schedules for all suggested models, as if we were implementing them. This might include staffing two desks (1st floor service desk and the TLC Tech Desk) or just one desk (1st floor service desk), depending on the suggested model. The schedule for each location should show the level of staffing, numbers of staff and students from each unit (Research Services, Access Services, and Digital Systems and Stewardship) who will be on duty each hour in a typical semester week. (The number and level of staffing could fluctuate based on the time of the semester.)

- What is the role of librarians at the desk(s)? Are they needed at any times of the day/week/semester? If they are not at the desk, what procedures do we use to handle in-depth consultations and referrals?

- What are the training needs for staff at each desk (dependent on the service model recommended above)? Outline a possible training program -- what elements should it include, and what is a reasonable timeline for fully training (or cross-training) staff?

The report is due to Cinthya, Yelena, and Tim by 5pm Friday, March 28, 2014.

# APPENDIX B: TLC Services

**Equipment Loan Program**

All equipment (with the exception of laptop security cables) that circulates from McKeldin Library is managed from the TLC Tech Desk. The Tech Desk provides a secured environment for housing the equipment, as well as familiarity with its usage.

**Specialized Equipment**

**Poster Printing**: A large format plotter is located in the TLC near the Tech Desk, and staff offer assistance with formatting and printing on this machine.

**3D Printing**: a Makerbot 3D printer is located behind the Tech Desk, and use of this machine is ***staff mediated***. Patrons can consult with staff at the Tech Desk on how best to print their object. Once a design has been determined, staff print this for the patron, and contact them when it is ready for pick-up.

**Associated Services**

Services formerly associated with the McKeldin Copy Shop are offered at the Tech Desk, including ***binding*** (soft cover & spiral), ***faxing***, ***laminating***, and ***Terrapin Express / CSVT administration***, including monitoring, troubleshooting, replenishment of supplies, cash pick-up, money processing.

**Room Reservations**

TLC Tech desk staff coordinates usage of space in the learning Commons in two primary ways:

***Groups Study Rooms***: Six rooms are available for reservation for up to two hours by students. Tech Desk staff charge out keys to gain access to these rooms. Staff also assist in using the technology in these rooms such as computer monitors and hook up to laptops.

***Event / Workshop booking and coordinating***: Groups on campus are increasingly using space in the TLC for their meetings, often on a regular basis. Tech Desk staff assist in room set-up and technology use if needed.

**Restaging of furniture on a regular basis**

Tables, chairs, dry erase boards etc. are moved by students to meet their momentary needs (primarily at night); Tech Desk staff restages the furniture on a daily basis to realign it more closely to the interior designers intent (which meets the needs of students during much of the day).

**1st level technical support**

Support for desktops, scanners and printers on floor.

# APPENDIX C: Scheduling – New Desk Models, Fall/Spring







# APPENDIX C: Scheduling – Comparison to Current Staffing





Note: DSS does not currently provide in-person or on-call staffing for first floor desks.

.n = Number of people on call

# APPENDIX D: Training

An outline of training elements is as follows:

Libraries Home Page

• Can locate hours and locations of the libraries

• Can find information about the Libraries and services

• Can navigate to WorldCat, ResearchPort, Guides, etc.

WorldCat:

• Can find an item and decipher the holdings information

• Understands the request button and ILL button

Aleph

• Can check out and check in an item

• Can use the Illiad system to check out or check in an item

• Can navigate the patron record

• Can renew items

• Can assign guest account

Reserves

• Helping patrons use reserves

Libraries Policies and Procedures:

• Desk procedures

• Borrowing policy

• Emergencies

LibAnswers

• Know how to use LibAnswers to add transactions

Referral

• Knows when and how to refer patron to librarian

Pharos

• Use Pharos to create print jobs

Troubleshoots

• Printers, scanners

Self Checkout Machine

• Knows how to guide patron in using the machine

Alarms/Safety:

• Turns off alarms when generated

• Understands policies and procedures on safety issues

• Knows the Safety Monitor for the first floor

Lost and Found:

• Records lost items

# APPENDIX E: Bibliography

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