Recommendations

The D/M Working Group to Examine Reference Services has made the following recommendations on reference services in Doe/Moffitt. While none of these recommendations particularly address Moffitt reference services it is believed that any of these recommendations could easily apply to Moffitt services. The Working Group’s overall goal is to bring about a culture of assessment for reference services so that decisions about services, new and existing are user-centered and based on measurable data.

These recommendations are not final and we welcome your ideas, input, and comments. Please comment to the Wiki recommendation page and include the number of the recommendation you are giving feedback on in your comment. For instructions on commenting to a Wiki page, either watch the instructional movie or read detailed instructions.

**Recommendation 1:** Regularly collect, report, and analyze all data necessary to evaluate and assess existing D/M reference services and for inclusion in the design process of new services, examples: reference desk and eref usage, RAS appointments, library pass requests, user and staff surveys, user interviews, and any external demographic information on users.

Recommendation 2: Implement a revised reference statistics form with new data categories; the recommended form simplifies the reference categories and allows data to be gathered in new categories, for example user requests for assistance with technology (database use, downloading, AirBears, proxy server, etc.).

**Recommendation 3:** Develop and implement on reference desk area public computer(s) a regular series of online user surveys to gather user data, evaluate reference services, measure user satisfaction, and gather information on any proposed new services. This survey would also be used to collect user information on those users willing to participate in focus groups and/or user testing new services.

**Recommendation 4:** Develop and test the use of online reference staff surveys to solicit opinions on services, interest in participating in new services like IM reference, and gather input on scheduling and training needs.
**Recommendation 5**: Request Systems Office tracking of reference desk IPs for data on usage of online catalogs, and electronic databases since there is currently no measurement of the use of these online reference tools.

**Recommendation 6**: Continue testing of the Information Desks at both North and South entrances to Doe during the first two weeks of each semester to determine if these desks improve outreach to library users, and extend reference services within Doe; determine the best public service role of Security Desk staff and training needs.

**Recommendation 7**: Test new reference service location on Level C of the stacks, the use of tablet laptops and test the use of roving librarians.

**Recommendation 8**: Implement IM reference at the Doe reference desk.
**Brief History of the Working Group**

The Doe/Moffitt Working Group to Examine Reference Desk Services was created on August 3, 2005 at the Doe/Moffitt Reference Meeting chaired by AUL Isabel Stirling. At this same meeting in response to discussions two other working groups were also created: Working Group on Library Passes and Working Group on Doe Tours. Each group was given a broad charge, and asked to present findings and recommendations at the October 4th ADMIRE meeting. Volunteers were requested and appointed as members for each group. The Working Group on Library Passes issued its recommendations on this program; the Working Group on Doe Tours was disbanded.

The volunteers appointed to the reference desk services group are Tim Dennis, Harrison Dekker, Paul Hamburg, Susana Hinojosa, and Mari Miller. Meeting many times during the months of August and September, the group made the early decision to use JotSpot Wwiki to facilitate communication within the group, post discussions, meeting minutes, and work to date. The Wiki site is at [http://dmreferencereview.jot.com/WikiHome/](http://dmreferencereview.jot.com/WikiHome/).

**Working Group Activities to Date**

As a result of past discussions that were also raised at the August 3rd meeting, the working group started its work with an analysis of Doe reference desk data and scheduling. Data was requested, analyzed and posted. On the basis of this analysis and the low reference usage, the group recommended that night (M-Th) reference desk hours be curtailed by dropping the last two hours (7-9pm). This recommendation was forwarded to AUL Stirling and implemented in Fall Semester 2005 reference desk schedules.

The review of reference desk data also led to a new analysis of the data categories currently collected and of the ARL statistics requirements. This analysis resulted in a new reference statistical form and new data categories. The recommendation for use of the new form and new data categories was presented at the October 4th ADMIRE meeting. See the Wiki for details on ARL requirements and the recommended new data categories.

The confirmation of low usage of reference services at the Doe reference desk led to discussions of reference services in different areas of Doe that would bring reference closer to library users. One consideration: a new reference service area on Level C of the stacks during high use times (midterms). To test reference services in high traffic areas, the working group experimented by locating two temporary Information Desks at both entrances to Doe early in the Fall Semester. These two Information Desks, staffed by volunteers, Monday, Aug 29th through Wednesday, Sept 7th, 11am-3pm, resulted in 746 contacts!
was obvious from the experiment and data, that library users entering Doe had many reference and informational questions but rarely made the trip to the 2nd floor reference desk. A report on the Information Desks experiment was given at the Oct 4th ADMIRE meeting along with a recommendation that this reference/information service be continued the first two weeks of each Fall Semester. Who would staff these desks and what level of service should be provided are future discussions.

Along with the possibility of reference services in Doe high traffic areas, the working group studied new reference services such as IM/Chat reference. Members of the working group are evaluating software, staff training, and possible scheduling for this service. IM/Chat reference is now being tested by the Government Documents unit.

A necessary component of any reference service is the constant collection of user information. Recommendations include user and staff surveys, regular use of student focus groups, and the use of any technology that simplifies this work, e.g. online user survey on a PC near the reference desk.

Another necessary component of any reference service is the need to regularly gather data and analyze this data to evaluate the effectiveness of existing services ranging from staffing, scheduling of hours, to what types of questions are asked at the reference desk, where is training needed, and more.

The working group knows that change can be difficult and that new services can be seen as challenging long-term practices and procedures. It is clear however that patterns of library use have changed and that our future reference services need to reach out to users either through use of now standard technology such as Instant Messaging for reference services, or through the use of new services in high traffic areas, e.g. the stacks, at building entrances, maybe even at other campus gathering places, such as the Free Speech Café and resident dorms. Even a cursory look at services provided at other comparable academic libraries shows that many of these libraries already provide many of these innovative services and that the UC Berkeley Library needs to move with the times. It is hoped that RRC can take a lead in many of these areas.