

**Model: Information & Research Services Redesign
Progress Report 6/14/2005**

T=Target, O=Off Target

<i>Philosophy: Objective</i>	T/ O	<i>Next Steps and Comments</i>
Patron-driven – <i>we provide services that our patrons want and need, in the manner in which they want and need to receive them.</i>	T	Staff members ask more often if what we are doing is best for our patrons
Responsive, effective, friendly service to our users	T	Service has been incorporated into our SWOT exercises.
Foster self-sufficiency in users – <i>while we want to provide assistance to our users we also realize that in many instances, our users want to work independently, therefore we provide the means for users to navigate our website and utilize our resources as efficiently and easily as possible</i>	O	Ways to foster self sufficiency: hand outs (wait until the Publications assistant arrives?), website (library awareness is working on), signage (Kelley will talk to Library awareness)
Make the best use of technology to give excellent service – <i>our users expect the libraries to provide cutting edge technological resources; we also want to employ technology in the provision of reference and information services</i>	T	Computers have been upgraded, the multi media equipment has been moved to an open area, new digital microform reader and printer, “Claremont Cash” will be accepted at the Copy Center to pay fines and purchase Copy Center items starting Fall 2005.
Barrier-free – <i>includes the elimination of physical barriers as well as technological barriers as much as possible</i>	T	The elevator has been opened up to all floors, the Welcome Desk helps people at the entrance, extra wireless hubs have been installed, extra ports have been activated. Ina will talk to Jusef about having a computer with handicapped access. Future steps: more joint planning between IT and Libraries’ staff should take place.

<i>Philosophy: Objective</i>	T/ O	<i>Next Steps and Comments</i>
Acknowledge "Generation Y" and their learning styles – <i>born after 1982, this generation expects information to be available whenever and wherever, they multitask and therefore expect all tools to be available wherever they are working, they are accustomed to an environment where life, play, entertainment, school and work commingle in an increasingly self service environment, they use instant messaging for recreation as well as educational purposes, they expect value and tend to be visual learners with low thresholds for boredom.</i>	T	Effort was made to acknowledge "GenerationY" by including students in our committee, reading articles about their learning styles, and attending conferences that covered this topic.
Provide seamless navigation of Libraries' web site – <i>should be easy and logical to use</i>	T	Library Awareness is redesigning webpage, modified version due Fall 2005, Blais retooling group SPT is examining the design of our online catalog. Future steps: continue to look at the website with focus groups and other assessment tools.
Provide seamless navigation of the libraries' buildings – <i>excellent signage, and also provide personal service where needed</i>	O	Need to create signage and discuss navigation. Kelley will talk to Library Awareness.
More opportunities for staff to choose to work with users – <i>there will be opportunities for staff to work in public service areas in addition to their primary responsibilities (e.g., Welcome desk)</i>	T	Staff have the opportunity to work at the Welcome Desk, staff will have the same opportunity at the Information and Reference Desk Fall 2005.
Respect for each other's work – <i>everyone's job within the library is important and all need to be valued for their contribution to overall excellent service to our users</i>	T	Respect has been incorporated into a SWOT group.
A structure that focuses on accountability – <i>all staff need to perform excellently and this needs to be expected as part of each member's job</i>	O	Beyond the scope of our charge.

<i>Philosophy: Objective</i>	<i>T/ O</i>	<i>Next Steps and Comments</i>
Establish collaboration points between IT and public services (both within IT and in the Search Centers) – <i>so much of what we do in public service areas involves technology that we need to establish close ties with IT, especially in the areas of development and innovation</i>	T	IT staff member now has office in the search center. Future steps: IT staff member will be incorporated more into the information and reference staff by including him in meetings, joining him to mail list, having him staff the information desk. <u>Cindy</u> will talk to IT about this.
Offer opportunities for users to provide continuous feedback of our services – <i>we need to provide methods for our users to comment on the service and services that are provided</i>	O	<u>Kelley</u> will talk to Library Awareness
Consistent training for all public service points – <i>one of the comments expressed by our users in the past has been inconsistent service from different staff members, with consistent training using uniform training materials, all staff should be able to provide equal information service</i>	O	<u>Cindy</u> will write proposal for an integrated public service training program, proposal will be brought to management council with the recommendation that an SPT be formed
Everyone on the staff is in effect a “Roaming Information Provider”	O	Staff now have name tags and shirts with libraries’ logo to make more visible to patrons. Future steps: <u>Cindy</u> will address this in proposal in point above.

<i>Physical Features: Objective</i>	<i>T/ O</i>	<i>Next Steps and Comments</i>
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<i>Physical Features: Objective</i>	T/ O	<i>Next Steps and Comments</i>
<p>Establish Research Services Desk staffed by either a Research Assistant and a Librarian, or just one of these, depending on time of day. <i>This desk might be staffed by 2 Research Assistants during morning, evening and weekend hours when there is no reference librarian on duty, so that one Assistant could be roving through the building.</i></p>	T	<p>The reference and information desk is now staffed by a combination of librarian and information assistant. Due to budget constraint and thus shortage of information assistants, roving is not possible at this point. Also, some staffing issues need to be worked out. Cindy will send a message to Ref Desk mail list and form a group of Iris librarians to look at the librarian staffing issues at the desk.</p>
<p>Eliminate present location of Reference Desk <i>In this model, the Reference Desk would be combined with the present Information Desk, to become a Research Services Desk. The Desk's location will ultimately be determined by other features of the model.</i></p>	T	<p>Old desks have been moved to new location, waiting for new desk to be installed.</p>
<p>Remove Search Center Assistants Desk, <i>Students currently in this position could become Research Assistants or Welcome Desk Assistants. These positions could become either Research Services Desk Assistants, with part of their responsibility being to rove through the building, looking for people who need help. Another possibility is that the present job description for a library shelver may be expanded to include roving responsibilities – i.e., a shelver would have training to provide answers to directional questions and have an understanding of where to refer library users with various questions. Modules for this training will be developed, so that all staff have access to consistent training.</i></p>	T	<p>Due to budget constraints, shelvers cannot be rovers at this point, however they will receive information assistant training.</p>

<i>Physical Features: Objective</i>	<i>T/ O</i>	<i>Next Steps and Comments</i>
<p>Establish a Welcome Desk (counter-height) in the lobby of Honnold/Mudd, to welcome users, scan cards and answer directional questions. <i>The primary purpose of the Welcome Desk is to scan cards, monitor the gates and the elevator exit, offer initial directional information and generally welcome people to the library. Potential security issues here could be addressed by the installation of a "panic button" under the desk counter, use of a security camera and/or use of an emergency telephone. Also, this configuration would allow the elevator to be used for access to all floors of the building. This type of gate would free the Research Services Assistants at the Research Services Desks from oversight of the gate.</i></p>	T	<p>Temporary Welcome Desk is in place, due to costs and time required, new desk will not be installed until summer 2006, earliest.</p>
<p>Establish kiosks with a pc and phone (direct line to Research Services Desk) on Honnold 1st floor and Mudd 1st floor (2 kiosks on each floor, side-by-side, 1 stand-up height and one that meets ADA requirements) and at Denison and Sprague. <i>This would establish a needed presence in these areas of the buildings, from which questions are often generated.</i></p>	O	<p>We need to investigate this further. Both floors are currently under renovation, recommendations are being postponed until completion.</p>
<p>Copy Center moves to present ILL/Document Delivery area <i>This would provide a more public presence for the Copy Center as well as provide Copy Center support for the networked printers</i></p>	T	
<p>Move networked printer from its present location in H/M Search Center to the area across from the new Copy Center; Copy Center staff have responsibility for printers. <i>Copy Center staff will be able to keep this public printer in their line of vision to monitor its service.</i></p>	T	

<i>Physical Features: Objective</i>	T/ O	<i>Next Steps and Comments</i>
Open Copy Center/Multi-Media Room area by knocking out wall between the 2 and reconfigure the space as needed.	T	
Move multi-media equipment out into open area across from Copy Center (except for plotter); some of the present pc's would move to south Index Room. <i>We have observed in other libraries that multi-media equipment is used more when it is not behind the physical barrier of a door. Students seem to appreciate being "empowered" to make use of this equipment without intervention.</i>	T	Multi-media equipment now in search center.
Move some A/V materials to public area (present Index Room? Near MMR?); process these with specialized tattletale for security. <i>Users appreciate the ability to browse these materials and select what they need.</i>	O	Due to security concerns, this is not being done at this time. Consider option in the future.
Open present Index Room (New Library 2 nd floor, South) to add pc's and comfortable furniture, Browsing & New Books, newspapers. <i>This would provide a welcoming area for a variety of purposes, as the user enters the building. Lighting is good, and people already make frequent use of the study tables in this area.</i>	T	Browsing and new books were not moved due to lack of space. Still hope to get comfortable furniture in the search center.
Circulation Desk will become the "Circulation and Information" service point, with responsibility for answering more telephone calls and making more referrals. <i>With the consolidation of the Reference Desk, Information Desk and the Search Center Assistance Desk into one Research Services Desk, this will allow only 2 major desks for patrons to choose between, rather than 4. Also, since many questions that presently come to the Information Desk are transferred to Circulation, this change in telephone lines will provide smoother service for our patrons.</i>	O	Circulation staff will receive public service training at a future date when public service training program is implemented. Also, Fall semester circulation and the information/reference desk will survey phone calls to decide what phone line would best serve our patrons. Cindy will implement the survey with Marcia and Circulation.

<i>Technology Features: Objective</i>	<i>T/ O</i>	<i>Next Steps and Comments</i>
<p>Monitor 24/7 for Claremont Colleges users more hours; recommendation is to monitor Claremont Colleges users all the hours the Research Services Desk is staffed with a reference librarian. <i>This allows Claremont users instant response from a Claremont librarian, rather than experiencing the delay inherent in email; 24/7 software responses would still be available other hours from librarians at other 24/7 institutions.</i></p>	O	<p>Cindy will send message to Ref Desk mail list reminding people to turn 24/7 on while at the reference desk. She will also place a sign on the reference desk.</p>
<p>Put "Do you need help?" button in prominent place on main web site page, as well as on other web pages, with immediate responses expected. <i>This button could appear on all our web pages that include the "Libraries of the Claremont Colleges" banner, as well as on other pages that could be constructed to include the button [Note: it is uncertain whether or not we can place this button within commercial databases to which we subscribe.] The button would connect to the 24/7 software, which would be monitored by Claremont librarians during the hours there is a reference librarian on duty.</i></p>	O	<p>Cindy will talk to IT to see if this is possible.</p>
<p>Brand our electronic resources. <i>By doing this, we let our users know that they are "in" the library virtually, and that these are resources that we have deliberately subscribed to or otherwise made accessible for their use.</i></p>	T	<p>This is an ongoing project. Kelley will ask Cindi for the status of this.</p>
<p>Implement OpenURL <i>This allows the user to make a direct connection to the full text of an item if we have electronic access to it.</i></p>	T	<p>Open URL group is ongoing.</p>
<p>Add continuous survey feedback form to web site, possibly as part of the "Do you need help" button options <i>This would serve as an additional means of input from our users, regarding help they might need, or comments they wish to make.</i></p>	O	<p>Kelley will ask Cindi about this.</p>

<i>Technology Features: Objective</i>	<i>T/ O</i>	<i>Next Steps and Comments</i>
<i>We know from users' comments that many of our user community would like the ability to have web pages display in Chinese, Japanese or Korean languages. This is a service application that is available to us and needs to be implemented.</i>	T	Language utility has been turned on.
<i>The rolodex would be populated with questions and answers that staff have determined are important and/or for which the answers are esoteric and hard-to-find.</i>	T	Rolodex in place, but we need to encourage staff to use it. Ina will hold an inservice training session and ask people if they find it useful.
<i>This service would allow Research Assistants to contact the Desk, as well as allow the Desk to contact Research Assistants to alert them to someone needing assistance away from the Desk.</i>	T	Headsets purchased, do we need to train staff when to use them and what they are for?
<i>These modules would contain a self-testing feature. All staff that come in contact with users should be familiar with these modules. Examples of these training modules: Locations and Directions, Blais Training, Connection Issues (remote, wireless, wired), Databases – using the subject list, basic Colleges information (names, locations), Electronic Journals, Electronic Books, Interlibrary Loan and Link+, Circulation Basics, Access Basics, 24/7, Ask a Librarian, Microsoft Word, Microsoft Excel.</i>	O	Cindy will incorporate this into the proposal for an integrated public service training program.
<i>It is hoped that by having a central repository for this type of internal library information, there would be a decrease in similar email messages.</i>	?	Start here next meeting What is the status of this?

<i>Technology Features: Objective</i>	<i>T/ O</i>	<i>Next Steps and Comments</i>
Offer laptop checkout for users <i>We would try this on a limited basis at first, to see if there is a need.</i>	O	Are we still planning on doing this? In focus groups, idea got mixed review.
Sell connection cables at Copy Center	T	
Automatic startup and shutdown of public computers	?	
Information kiosks in Periodicals, Microforms, and possibly offsite (Pitzer? CMC? KGI? CGU?) <i>This would establish a needed presence in these 2 areas of Honnold/Mudd, from which questions are often generated. Also, Pitzer, CMC, CGU and KGI do not have a library on their campuses, and this would contribute to outreach efforts.</i>	O	Create plan to implement; same point addressed in "physical features"
"Call button" to be on PC's within the Honnold/Mudd building so desk staff will know location of person needing assistance <i>The button would alert the Research Services Desk to the user's need for assistance, and direct the staff to that person.</i>	O	Discuss with IT?

<i>Staffing Features and Opportunities: Objective</i>	<i>T/ O</i>	<i>Next Steps and Comments</i>
Create an IT presence or helpline for more immediate response to Search Center's user needs; 2-4 p.m. on weekdays is recommended as a beginning. <i>This can be either an IT staffer physically present in the search center during posted hours or virtually available via a monitored helpline.</i>	T	

Staffing Features and Opportunities: Objective	T/ O	Next Steps and Comments
Provide Library staff with the opportunity to become part of a Technology Development Team, working with the IT unit to examine new developments in technology and to be a liaison with all staff. <i>This would be a new standing team created to specifically facilitate staff/IT communication.</i>	O	Are we abandoning this plan? Why?
Assign Copy Center responsibility for plotter as well as networked printers. <i>The suggested move of the Copy Center to the current I.L.L. office and the relocation of the network printer to the north rail of the multi-tier stack would shift oversight and assistance to the Copy Center staff.</i>	T	
Establish Research Assistant position. <i>This position will work closely with librarians at the Honnold/Mudd Research Services Desk to provide initial assistance in the use of the Libraries' resources; they will work at the Desk as well as rove through the building. These Assistants will follow established referral protocols for handing off specific reference needs to either a librarian at the desk or to an appropriate subject specialist. Research Assistants may be regular staff, or in some cases, part-time temporary staff.</i>	T	Are we encouraging regular staff to sit at this desk?
Establish "Roving Staff" (Research Assistants) for peak hours, to look for users needing help; these staff will wear nametags and identifiable library vest. <i>One suggestion is that roving responsibilities be included in multiple job descriptions, e.g. shelvers, information assistants, research desk librarians.</i>	O	Will we be implementing Roving Staff?

<i>Staffing Features and Opportunities: Objective</i>	<i>T/ O</i>	<i>Next Steps and Comments</i>
Establish 30-60 minute shifts at a Welcome desk/table in H/M <i>Those at this desk would monitor the entrance gates and provide directional assistance. All staff (including student staff) would be encouraged to spend at least 30 minutes per week at this desk. There would be no external phone line or computer.</i>	T	
Someone will take responsibility for scheduling Welcome Desk shifts.	T	
Research Services Desk is staffed with at least 1 Research Assistant and 1 Reference Librarian during "reference hours" (10-10 and some weekend hours) <i>Those at this desk would answer information and reference questions in addition to monitoring 24/7's Claremont users and responding to virtual and physical requests for assistance.</i>	?	
When no Reference Librarian is on duty, the desk is staffed with 2 Research Assistants, so that one may rove.	?	
Transfer Search Center Assistants budget to budget for part-time temporary Research Assistants.	T	
Librarians will self-select into Core Groups. Those in each Group will devote more specific time to that chosen function, and less to the other functional areas; by focusing on these areas, librarians will be able to address the feelings of being overworked and pulled in too many directions. Each group is responsible for developing training modules, policies and tools to assist all librarians with their tasks in these areas.	O	This objective was decided to be out of scope for the reference redesign team and is being examined by the Librarians group

<i>Assistance Strategies: Objective</i>	<i>T/ O</i>	<i>Next Steps and Comments</i>
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<i>Assistance Strategies: Objective</i>	<i>T/ O</i>	<i>Next Steps and Comments</i>
Staff is always “on call” and is expected to respond when called– <i>our users are our first priority</i>	?	
Roving staff (“Research Assistants”) are scheduled during peak hours of library use – <i>this assistance will address the issue of our confusing and large building</i>	O	
24/7 used more hours to monitor Claremont community – <i>with additional advertising, more opportunities for users to find the service, and excellent response time, usage of this service will hopefully rise</i>	O	
Everyone makes referrals – <i>throughout the library everyone should know who to refer users to in order to address their research needs</i>	?	
Heavier use of referral forms at desk, if subject specialist is not available – <i>when a user is referred to a subject specialist, the information/reference staff also fill out a referral slip to be given to the librarian so the librarian can make the contact and does not have to wait for the user to make the contact.</i>	?	
More actively pursue follow-up contacts with users helped at desks or online – <i>when a referral slip is passed on to someone else for follow-up, that person will contact the user within 24 hours</i>	?	
Provide scheduled, advertised, on site assistance at campuses (e.g., Pitzer, CMC, KGI)	O	Are we going to pursue this?
Create an IT service point – <i>a virtual service point that is staffed by IT personnel or IT trained students to respond to public service requests for assistance</i>	?	

<i>Assistance Strategies: Objective</i>	<i>T/ O</i>	<i>Next Steps and Comments</i>
Establishment of the kiosks on Honnold 1 st floor and New Library 1 st floor	O	Create plan to implement; also addressed in “physical features” and “technology features”