**Minutes of the Reference Services Committee meeting**
November 11, 2015: 9:30 a.m. – 11:00 a.m.
Alice Moulton Room – Gerstein Science Information Centre

**Present:** Agatha Barc (Victoria); Alison Bell (Gerstein, ex officio); Heather Buchanksy (Library Admin); Richard Carter (St. Mike’s); Mona Elayyan (New College); Kyla Everall (Robarts Reference); Margaret Fulford (Laidlaw Library); Lucy Gan (East Asian); Lisa Gayhart (ITS); Navroop Gill (OISE); Debbie Green (Robarts, ex officio); Helen He (Dentistry); Angela Henshilwood (Engineering); Holly Inglis (Rotman); Judith Logan (Chair, Robarts/WAC); Courtney Lundrigan (Trinity); Anne McGillivray (Knox); Tim Neufeldt (Music); Stephanie Orfano (SCCO); Patricia Serafini (OISE); Nalini Singh (minutes, Inforum); Carey Toane (Gerstein); Jennifer Toews (Fisher); Meaghan Valant (UTM); Rita Vine (Faculty & Student Engagement, ex officio); Karen Wishart (Emmanuel/TST)

**Virtual attendance:** No one requested this.

**Regrets:** Marc Lalonde (ITS)

**Introductions:** Committee members introduced themselves since there were a number of new members in attendance.

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<tr>
<th>1. Selection of a minutes-taker – Nalini Singh volunteered.</th>
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<td>2. Minutes of the last meeting – Approved.</td>
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<td>3. Business arising from the minutes</td>
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<td>a) Reference Services Confluence space</td>
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<td>We discussed whether or not we wanted to move our committee’s documents from their current Drupal home to a Confluence space. Judith Logan can do this. The material would only be open to committee members. Some pointed out that official documents such as minutes and membership lists need to be open to UTL Library Council. Various options were discussed, and for now, we have decided to maintain the status quo.</td>
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<td>b) Selection of a new committee chair</td>
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<td>No one has expressed interest in chairship. Judith, whose term ends in February, will follow up by contacting various people. Qualities desired in a new chair include having a permanent status-stream position along with public service interests.</td>
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<td>c) Other</td>
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<td>Judith’s blog post from the <em>Putting Ourselves in Their Shoes</em> event will be up shortly.</td>
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<td>4. Report from ITS – Lisa Gayhart, for Marc Lalonde</td>
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Lisa reported on behalf of Marc, who could not attend today. She reported that ITS is carrying on with the same projects as discussed in last meeting.

QUESTIONS

Requesting uncatalogued items: People reported some glitches with this new service, e.g., items showing as being available in Robarts stacks, but with no call number, or with system-generated XX-call numbers. Items are coming from YBP, but glitchy items are not all YBP items. Further investigation with Alastair Boyd and ITS is in order.

Shelve browse status: Lisa answered that there are still some issues which are slowing things down. Testing is ongoing: there should be an update later this week. Lisa will send information to the refinfo mailing list.

5. Reference service check-in: Robarts Reference – Debbie Green

Reference services at Robarts are different because there are many specialized service points in the building, such as the 4th floor Robarts Reference desk and the Petro Jacyk Resource Centre, along with general outwardly-facing ones such as the 1st floor information desk and the Information Commons.

Service delivery options: In-person service from 11 am – 6pm Monday to Thursday, 11 am – 5 pm on Fridays, and 2-5 pm on Saturdays; email service; research consultations; and telephone service, with a commitment to answer the telephone right away. Remote services include the Ask-A-Librarian service and LibAnswers, both overseen by Judith. Remote support is popular and very valued by users. Desk hours were shortened, and adjunct librarians (from elsewhere in UTL) have been given a ‘vacation’.

Change in nature of questions: Troubleshooting needs have gone up, while mid-range reference queries have decreased, users want to figure things out for themselves. Debbie noted that a bigger portion of telephone requests are from faculty members

SOME RECENT EXPERIMENTS & RESEARCH

1st floor pilot (2012–2013): Reference staff shared the desk with circulation staff, while continuing phone service from the 4th floor. In the 8 month period, it was found that while query volume did not change, more undergraduate users were served, and more (but not a great deal more) research/consultations requests were received. The space was uncomfortable and lacked quiet for working with users. Users would not understand when reference staff handed them over to circulation staff.

Roving reference: Lanyarded Scholars Portal staff were deployed to rove the building. It was an interesting, but not super-successful experience. Some personalities are not suited to user outreach work.
iStaff initiative (August 2015– ): Headed up by Kyla Everall, this shared project between Reference and Access & Information involves SLA student staff in blue vests (with pockets for iPad minis) travelling around the Robarts building from Monday to Friday, to help troubleshoot user needs. iStaff use Google Hangout to call in other staff as needed. There are 5 iStaff currently, with 2 assigned per shift. They have been selected for qualities such as: active on-campus engagement; strong sphere of influence with peers; highly developed customer service skills; tested for sensitivity to diversity issues; and, self-starting, with high attention to detail. It has been working out very well so far, with a lot of equipment support questions being handled. 25 new iStaff ‘lite’ are about to be trained. Lisa Gayhart and Heather Buchansky are working with iStaff to conduct some user experience experiments. Info Commons print station attendants are also now wearing the blue vest.

Data skills: Nich Worby and Jesse Carliner are enhancing their data skills and offering classes in data visualization, etc. High attendance has been observed. This is part of an ongoing exploration (with the help of Lisa Gayhart) to upskill areas of need.

Debbie’s research findings:
Debbie undertook research leave from July–December 2014 to study how users engage with space and services, as part of renovation planning for Robart’s ground floor. A working group was formed to examine service models and other issues. Another group is looking at kiosk models: what self-serve options can we offer when spaces are unstaffed? DIY user support is important and necessary, but kiosks are not very visible, and not functioning how they are designed to work. Fixes are being investigated.

User-centred service design: Statistics are telling us what users need, e.g. increase in technical assistance needs. We, as service managers, need to heed these signals. We are trying to use interactions with our users in order to help us understand their needs, THEN design our services to address those needs. Lisa’s recent presentation to senior staff made the point that it is service goals rather than scholarly goals that are tripping users up. If service goals are not met, then users feel unhappiness with the whole library. We want to signal availability without being Walmart greeters. Some iStaff have great ability to connect with users, letting them know that ‘I am around if you need help’ rather than ‘Can I help you?’ Our students pride themselves on their competence, and do not like to seem stupid.

Resource:
6. Student engagement update – Heather Buchansky

Student journal forum
This full day event, with morning and afternoon talks, was held on Oct 22/15 for both undergraduate and graduate students. 50 people registered, and 33 attended throughout the day. Current and aspiring student journalists learned about library support for journal publishing and copyright issues from librarians and faculty members across departments. A journal show-and-tell was held, with 7 of 10 registered student journals participating.

Highlights: Peer-learning, and sharing of editorial and production practices; presentations from student editors (U of T Medical Journal & Caméra Styl, the Cinema Studies Undergraduate Journal); hearing about Prof. Mark Kingwell’s writing and editorial experience from his student days to present day; and, the promotion of cross-departmental collaboration, e.g. Mariya Maistrovskaya (ITS), Graeme Slaght (SCCO), Heather Buchansky (Faculty & Student Engagement), and Agatha Barc (Victoria University Library).

Lessons learned: Student editors still need support; peer support in an event like this can work well with both undergraduate and graduate students’ participation, without the need for silo-ing operating; they enjoyed this opportunity to connect as no others exist; editorial boards form between summer and fall, so a similar event can run between fall and winter terms; student time pressures are such that a ½ day event may be better; and, the best advertising venues for a venture like this are direct email and peer-driven word-of-mouth.

Next steps: Creation and maintenance of online space for student editors, with OJC services and copyright information available; holding more events to build on this one; and, in such events, including presentation topics suggested by students, such as editing skills, and online vs. print discussions.

7. Mapping the library – Stephanie Orfano

This project arose from the Liaison Librarian Summit (2015), and entails mapping the organizational complexity of UTL beyond the traditional organization chart model. Visual charting and other modalities could illustrate service point locations, services overlap, show who can help us when we have questions about specific knowledge areas and projects, and, for a larger purpose, map out points where we interact/have contact with faculty members.

The group includes Kelli Babcock (ITS), Sean Forbes (Rotman), Klara Maidenberg (Robarts), and Stephanie (SCCO). Members will divide the 44 libraries amongst themselves, then gather information on things like: staffing numbers and functions; staff attendance at centrally held meetings; activities where staff directly engage with faculty members; and, best person to contact about projects, etc. The group plans to compile the information they gather with the help of an appropriate visualization tool. Stephanie requested our feedback e.g. what would we find helpful to know about. If you have suggestions, email her at stephanie.orfano@mail.utoronto.ca

Comments, questions, etc. arising:
• Rita Vine offered background: this idea came from a group of UTL attendees at the recent Cornell Institute for liaison librarians. The intent is to paint a picture where faculty members enter the library system, not only in terms of services, but also with respect to points of engagement.
• Tim Neufeldt observed that in a small library like his, their team approach facilitates contact with faculty members.
• Alison Bell suggested that the group could start with Robarts, see how things progress, then take it from there.
• Debbie recommended that the group could ask us all for examples of perplexing questions which a resource like this could help to answer.
• Carey Toane asked about possible uses – for referrals? New librarians? Stephanie suggested that it will identify areas of expertise.
• There was further discussion about the scalability of a project like this, as well as its maintenance challenges.
• Carey inquired about visual models under consideration. Stephanie reported that Kelly is looking into this.
• Navroop Gill mentioned that the OISE staff directory has assisted faculty members – one such contacted Navroop for a special book request by looking up her up.
• Richard Carter suggested that as a way to gather this information, we could each fill out a form about areas where we can be of help.
• Debbie recommended that the group consider both scholarly and service goals. The former are more readily addressed by already compiled lists of subject experts, whereas the latter is more nebulous. Carey pointed out that some subject expertise, e.g., patents, can still be hard to locate.
• Lisa pointed out that IT organizations engage in this kind of work so that they can better communicate beyond their internal silos. There might be correlations from the IT experience that are pertinent to this project.

8. User experience toolkit – Lisa Gayhart

Lisa, assisted by students, is working on the compilation of a UX toolkit for us to use on our own projects. It is slated for completion before the end of year. The kit contains information such as: an explanation of UX; information on how UX be can integrated into our projects; guidelines on how to do a card-sorting exercise; templates of privacy statements, scripts, etc.

A goal is to harness all the data and information that we have already gathered from our separate projects and collect it into a central location that we can all draw upon. For example, one of us may need to know about wifi problems, and could then query a database to find solutions that others of us have used.
Lisa mentioned the journey map project. Asking users to map their journey (e.g. I want to find a scanner) resulted in interventions of service assistance, thus sending their map into ‘happy’ territory. Debbie added that the goal is to have services working well, because by the time users ask for help, chances of remediation are low. She reiterated that people don’t want to ask for help, that we should build services so that they don’t have to ask, and that research should help us to focus on service design, not remediation.
Jennifer Toews suggested that Jenaya Webb’s (OISE) research on way-finding could help inform the kit. If you have information you want to share for toolkit, and/or you wish to be involved, or have worked on projects that might be helpful in terms of UX, email Lisa, who will be working on the toolkit over the next 2 weeks.

9. Other business

If no agenda items surface for December’s meeting, we will cancel it. Stay tuned.

Next meeting:
December 9, 2015 or January 13, 2016