

Information Desk Referrals: Implementing an Office Statistics Database

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In fall 2006, Colorado State University Libraries in Fort Collins, Colorado, underwent an administrative reorganization. Part of this reorganization involved changing Morgan Libraries' Reference Desk to an Information Desk from which staff and student assistants would provide reference referrals to librarians. To gather statistics and track the success of this new service, the College Liaison Librarians, formerly known as Subject Librarians, implemented an office statistics database to record and track referrals received in their offices from Information Desk staff. This database evolved to also provide a centralized online area to collect numbers of office reference transactions. This paper discusses the reasons behind the office statistics database's creation and the statistics it provides CSU Libraries College Liaison Librarians.



Morgan Library is part of Colorado State University (CSU), a land grant institution located in Fort Collins, Colorado, with an enrollment of approximately 21,000 FTE as of fall 2007. CSU Libraries consists of Morgan Library and two small branch libraries: an atmospheric science branch, and a veterinary medicine branch. In fall 2006, Morgan Library implemented a reorganization. Due in part to declining Reference Desk questions and a desire to utilize valuable Subject Librarians' time more efficiently, a portion of the reorganization involved changing the Libraries reference model. The Reference Desk became an Information Desk staffed by state classified employees, student assistants (both undergraduate and graduate), and temporary librarians.

The reorganization created a College Liaison department in the newly formed Scholarly Communications division. The former Subject Librarians became officially known as College Liaison Librarians with duties similar to those in the past including collection development, research assistance, instruction, and liaison responsibilities with colleges and departments. As of fall 2006, the number of Subject Librarians was twelve with two expected retirements in spring 2007. Just one year earlier, in 2005, the department had seventeen librarians with subject reference and collection development responsibilities. Additionally, over the years Morgan Library's reference desk statistics had been steadily falling. From 2005 to 2006, the decline was 15 percent for the year; from 2006 to 2007, it was 17

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percent. In light of these changes, the Libraries administration used the reorganization as an opportunity to change the reference services model and move faculty lines to create new departments, such as Research and Development, and expand emerging departments, such as Digital Repositories.

The Reference Desk was changed to an Information Desk in January 2007, at the beginning of CSU's spring semester. The Electronic Information Commons (EIC) Help Desk merged with the new Information Desk, creating a centralized combined service point. Due to budgetary constraints, this new assistance desk occupied the former Reference Desk with no changes to its design or location. Information Desk staff answer directional questions and simple reference queries, make referrals for in-depth help to appropriate College Liaison subject specialists, and provide technical assistance for the Electronic Information Center (EIC) computer users.

During the referral system's transition phase, College Liaison librarians provided backup office hours to assist the Information Desk staff with questions. Rather than four to six hours a week manning the Reference Desk, College Liaisons scheduled office hours during the 9–4 time frame M–F in 2-hour blocks with one librarian "on duty" at a time. It was hoped that the backup College Liaisons would be called upon during the initial training of Information Desk staff. However, this rarely occurred; and, in spring 2008, College Liaisons decided to discontinue providing this assistance due to statistics and anecdotal evidence indicating staff rarely contacted the backup librarian, preferring instead to refer patrons directly to subject specialists.

During the implementation of the referral model, College Liaisons and Information Desk staff expressed concerns over methods in which future assessment would be conducted and information gathered. It was thought that monitoring referrals might be useful. To track the

referrals resulting from this new service model, the College Liaison group decided to create a simple office statistics database. This database provides the librarians with an online collection point to record Information Desk referrals and reference queries they receive in their offices. Additionally, the Information Desk staff keep their own statistics on number of referrals made by the use of an electronic widget counter on their computer workstations.

Literature Review

The literature reflects little material discussing the recording of in-office reference statistics or the in-house design of a reference statistics database. In "Click and Be Counted: A New Standard for Reference Statistics," the author suggests that reference departments consider developing forms to measure and track reference statistics from "individual reference activity" conducted in librarians' offices and other places away from the Reference Desk.¹ Literature during the 1990s, when tiered reference became popular, discusses percentages of questions referred from Information Desks, but recent literature is silent on this information.²

A referral model, one in which information desk staff refer in-depth questions to reference librarians, has been explored over the years. The 1990s saw the rise of "tiered" reference service in which a staff member at an initial service point, usually an "information desk," answered directional and ready reference while referring in-depth questions to librarians. In 1995, the Association of Research Libraries (ARL) issued a report providing an overview of several libraries' information desks with details on locations, services offered, staffing, and training.³ In the 1990s, librarians began considering the Internet's potential impact on library services and wanted to "take positive steps to target and focus the energies and expertise of these specialists [librarians] so that they [could] deal effectively with the myriad of new information resources."⁴

Efforts to use staff efficiently and streamline services are always a concern for libraries where budgets are tight and staff workload pressed. In his article, "What Is the Best Model of Reference Service?" (published in 2001), Tyckson says, "Administrators and reference librarians alike struggle to develop the most efficient and effective means of providing reference service to their users."⁵ He goes on to further to explain that "one of the primary goals of tiered-reference service is to allow reference librarians to make better use of their subject and research skills."⁶

The Brandeis model of tiered reference service is frequently cited in the literature. This model began in March 1990, when Brandeis University Libraries eliminated the reference desk and replaced it with an information desk staffed by graduate students. Additionally, librarians provided a research consultation service. The Brandeis information desk staff provided directional and brief informational assistance for questions that took no longer than 2 or 3 minutes to convey. For other questions, staff would make referrals to the reference librarians. Their reasoning for implementation included providing "research consultation...designed to provide the optimal environment to enhance the client-professional interaction."⁷

Another example is the tiered service implemented at Lehigh University in 1996.⁸ The Lehigh University library combined their computing and library help desks and offered second-tier referral service. Their decision was not budgetary but a means of improving and coordinating services. A decline in reference questions, the changing needs of clients, and more interdisciplinary problems and questions were factors that led to this change.⁹ Help desk staff referred complex questions to a second tier of professional staff, based on the Brandeis University research consultation model.¹⁰ Lehigh University Library noted that their Client Services librarians were freed up with more time for outreach with faculty, staff, and students under this model.¹¹

Implementation of an Office Statistics Database

The initial idea for creating an office statistics database was to record and track referrals made from the new Information Desk to College Liaisons. However, the College Liaisons realized that this database would also be useful in recording all reference assistance they provided, not only from referrals. This database provides an online, centralized location for recording this information on a secure staff intranet.

The business librarian, a support classified staff member, and an information technology colleague developed the database with input from other librarians. The database is based on PHP scripting language and was created using MySQL. In development, ease of use was a primary concern so that College Liaisons would easily incorporate it into their work routines. A link to the input form is on the CSU Libraries staff intranet for easy access, and content fields are brief with both required and optional fields. The required fields include librarian name, time spent with the patron, and whether the contact was the result of an Information Desk referral. Another required field is the type of contact made and provides the librarian with the option of choosing e-mail, telephone, drop-in, or other. Indicating "other" requires the librarian to elaborate in a comment box that appears on the form. The librarians use the "other" field to record reference transactions such as instant messaging assistance and field reference in a department or college on campus.¹² Optional fields include discipline area and a general comments area. Over time, the College Liaisons realized the value of the comments field to clarify input, and now many librarians use this area to elaborate on their reference transactions. For example, supplying a comment such as "needed stats about global trade" provides much richer information than simply indicating a discipline area. Librarians hope that the information recorded in this database may be of value

to new CSU College Liaisons librarians in identifying heavy reference disciplines and busy weeks during the semester (see figure 1).

Questions that arose after the initial implementation of the database included whether to record all time spent investigating a question or just the meeting time. Another was whether to include instances of providing reference advice to a colleague or information to a student in the capacity of an advisor or as a committee member. To address these issues and to clarify the database's uses and intent, the College Liaison Librarians created a guidelines and information document (see figure 2). Some minor resistance initially existed to the creation of the database because of perceptions that this information might be interpreted incorrectly by those outside the department, but the College

Liaisons agree to its value and have accepted the need to quantify aspects of their work, such as reference assistance and referrals, for use in assessment.

Initially, the database dumped raw statistics into an Excel file, which a library staff employee then organized into reports. The original monthly reports provided a breakdown by librarian of total number of contacts, total number of referrals from the information desk, contacts during office hours, and total time spent (see figure 3). After review, this was later modified so that Librarians now simply enter criteria they are seeking in an electronic input form and an Excel file is generated instantly, eliminating the time spent by a library staff member in creating monthly reports while providing the convenience of quick access to data (see figure 4).

FIGURE 1
Office Statistics Database Input Form

Office Statistics Database
Add Entry

Date: 2008-04-11 15:55:02

Name --Select One--	Contact Type <input type="radio"/> Email <input type="radio"/> Phone <input type="radio"/> Drop-In <input type="radio"/> Other
Was this an information desk referral? <input type="radio"/> Yes <input type="radio"/> No	Time Spent Hours: <input type="text"/> Minutes: <input type="text"/>
Status of Patron -- Select one --	How many people were helped? 1

Did you meet during info desk back-up office hours? Yes No

Was this a scheduled appointment? Yes No

Discipline Area: -- Select a Subject --

Course: Course Number:
Course Instructor:

Comments

Submit Cancel

FIGURE 2 Information Desk Referrals

Office Statistics Information & Guidelines October 2007

Please Note: It is requested that individuals or groups, other than College Liaisons, who wish to use this data, ask for clarification as to the content, purpose, and intent of the statistics. The College Liaisons wish to avoid misuse of the data.

The purpose of the Office Statistics database is to provide a centralized, electronic format for College Liaison Librarians to record statistics of reference-type contacts with faculty, staff, students, and community members.

Background

The office statistics database was established in January 2007. The original intent was for librarians to record the number of referrals they received from the newly implemented Information Desk referral system. It was quickly realized that the College Liaisons could use the database to also record office reference transactions and so this was incorporated into the database.

Form

The form, available on the staff forms webpage, has both required and voluntary fields. The comments area allows librarians to expand upon information entered elsewhere in the form and give structure to the numerical information.

Use of information

The database is for the use of College Liaison librarians to monitor and record reference questions and information desk referrals received. The information collected in the office statistics is not necessarily comprehensive nor completely reflective of the effort distribution of the College Liaison Librarians and is voluntarily submitted.

Potential uses

The following are possible uses by the College Liaisons of the office statistics database.

1. Monitor the amount of referrals received by College Liaisons
2. Monitor and track busy reference times during a semester
3. Provide information to new College Librarians on trends and volume of reference
4. Provide subject specific trends

Guidelines

The following are suggestions of data to include in the database. Each librarian should use their own discretion as to what to include. Use of the database is voluntary.

1. Record referrals made from the Information Desk.
2. Record reference queries received in office from students, faculty, staff, community members.
3. Enter time spent assisting other librarians with a reference query or answering a research question.
4. Use the comments area to expand upon data entered.
5. Record reference services provided outside of the library such as with office hours in a department, college, student center, etc.
6. Other entries as individual librarians feel appropriate.

FIGURE 3
Original Monthly Report Summary

By the Numbers - May, 2007					
Librarian	Total Number of Contacts	Total Number of Referrals from Information Desk	Contacts during Office hours	Total Time Spent per	
				Total Mins.	Hrs

Findings: Discussion
Referrals

To assess the referral model, numbers of Information Desk referrals were compared to what College Liaisons reported in the Office Statistics Database. Information Desk staff record referrals and references on an electronic widget on their computer workstations. Essentially, it is an electronic version of keeping tick marks. Table 1 shows the comparison of referrals between the number that Information Desk staff reported and those that the College Liaisons reported by semester for the 2007 calendar year. The data reflect that approximately 66 percent of Information Desk referrals were noted as received by College Liaisons in the spring semester, 60 percent in summer, and 67 percent in the fall semester. Possible variables include librarians not asking if the patron was referred by the Information Desk staff, Information Desk staff forgetting to record referrals, and patrons not following up with referrals. Not all referrals will be followed through by patrons, particularly if a subject librarian is unavailable when the patron needs assistance. Yet another variable is that Information Desk staff may also make referrals to librarians and staff in other departments such as Archives or Interlibrary Loan. These numbers only reflect those referrals received and recorded by College Liaison Librarians.

As a percentage of total office contacts, referrals received by College Liaisons decreased from 37 percent of office contacts to 25 percent in 2007 (see table 2). The lower percentage over the course of the year may be due to a number of factors, including

increased marketing efforts by College Liaisons, patrons contacting librarians directly for assistance, and possibly increased expertise by Information Desk staff.

Referrals account for a small percentage of all Information Desk contacts (see table 3). The percentage of contacts

FIGURE 4
Input Form for Retrieving Statistics

Office Statistics Database

Statistics

Select Date Range: (Leave Blank for Search All)
mm/dd/yyyy

Start Date:

End Date:

Select Librarian(s):

Contact Type: (Leave All Blank to Search ALL)
 Email Phone Dropin Other

Referral: (Leave All Blank to Search ALL)
 Yes No

Time Spent:
 Equal or Greater Than Equal or Less Than

Hours Minutes

Status of Patron:

Number of Patrons Helped:
 Equal or Greater Than Equal or Less Than

TABLE 1
Referrals Recorded, 2007

Semester	Info Desk Referrals	Referrals Received	% Received
Spring	379	249	66%
Summer	75	45	60%
Fall	276	185	67%

referred averaged at close to 2 percent for the spring semester and a consistent 1.2 percent for the remainder of the year. These numbers differ substantially from the referral statistics in the literature. At Brandeis, information desk staff was told to expect to refer about 40 percent of the questions they received. "This is based on data in the literature that claims about 62% of questions received at a reference desk fall into the quick information/directional area."¹³ At the University of Illinois at Chicago Library of the Health Sciences, referrals were approximately 15 percent of information desk transactions.¹⁴ At the University of Illinois, Urbana-Champaign information desk, 9 percent of questions were referred to the reference desk.¹⁵ It is important to note that statistics from the Brandeis model and others are from the early nineties, when the Internet was in its infancy and reference statistics were higher overall. Variability in these referral statistics may reflect varying levels of expertise, referral policies, and training. Google, increasing reliance on the Internet, and better outreach efforts by subject librarians may account for the low number of referrals and similarly to lower reference desk queries over time.

Assessment and Future Plans

The database provides an online collection tool for CSU Libraries College Liaisons to record referrals and other reference information. The statistics gen-

erated will be useful for assessment of the Information Desk referral model as well as individual librarians' and the department's activity reports. Specific uses of the data include providing the ability to track busy times of the semester and determining high reference demand by classes or disciplines. Numerous reference requests from students in a particular class may indicate that the class might benefit from a library instruction session or indicate how librarians might instruct or assist a class. Additionally, the statistics provide historical information for new librarians on types of questions in their subject area. The "comments" area is an excellent location for College Liaisons to provide more information about the subject or topic being researched, and several librarians consistently use this section to elaborate on their reference transactions.

In spring 2008, a formal assessment of this model began. While the task force charged with this assessment looked at referral statistics, members focused on questioning College Liaison and Information Desk staff as to their impressions and concerns with the model. Further

TABLE 2
Total Information Desk Referrals Received as Percentage of Total Liaison Office Contacts, 2007

Semester	Liaison Offices Total Contacts	Referrals Received	% of Office Contacts
Spring	665	249	37%
Summer	130	45	35%
Fall	733	185	25%

TABLE 3
Percentage of Information Desk Contacts Referred, 2007

Semester	Information Desk Contacts	Referrals Made	% of Contacts Referred
Spring	19,692	379	1.9%
Summer	6,295	75	1.2%
Fall	22,800	276	1.2%

assessment will be conducted in fall 2008 to examine both qualitative information from staff and quantitative information from the office statistics database.

Conclusion

As libraries change and streamline services, the positioning of subject librarians' reference skills in relation to library service points must be carefully evaluated. CSU Libraries office statistics database attempts to assess the referral model's performance and provides a quantitative method of tracking reference, going beyond traditional tick sheets. The database's statistics are useful to individual librarians because they provide information on topics that are heavily researched and determine busy times of

the semester. This database also provides new librarians with insight into the types of questions asked in their subject areas, helps identify classes or departments that may benefit from library instruction, and may assist with assessment of workload issues. The office statistics database is an initial step in assessing the referral model at CSU while providing useful data to librarians about the reference questions they receive. If information desk referrals are low, are students not asking in-depth questions, are they no longer seeking assistance as in the past, or is information desk staff not making appropriate and timely referrals? These questions need further investigation. The database provides quantitative measures for reference that historically have been lacking.

Notes

1. Jennie M. Welch, "Click and Be Counted: A New Standard for Reference Statistics," *The Reference Librarian* 47, no. 97 (2007): 101-02.
2. Virginia Massey-Burzio, "Reference Encounters of a Different Kind: A Symposium," *The Journal of Academic Librarianship* 18, no. 5 (1992): 278; Karen J. Graves, "Implementation and Evaluation of Information Desk Services Provided by Library Technical Assistants," *Bulletin of the Medical Library Association* 86, no. 4 (1998): 481; Beth S. Woodard, "The Effectiveness of an Information Desk Staffed by Graduate Students and Nonprofessionals," *College & Research Libraries* 50, no. 4 (1989): 456.
3. Denise Forro, Lori A. Goetsch, and Clifford H. Haka, *Information Desks in ARL Libraries* (Washington, D.C.: Association of Research Libraries Office of Management Services, 1991).
4. *Ibid.*, 4.
5. David A. Tyckson, "What Is the Best Model of Reference Service?" *Library Trends* 50, no. 2 (2001): 183.
6. *Ibid.*, 194.
7. Massey-Burzio, "Reference Encounters of a Different Kind," 277-79.
8. Stacey E. Kimmel-Smith, "Ten Years After: The Integrated Computing and Library Help Desk at Lehigh University," *Internet Reference Services Quarterly* 11, no. 3 (2006).
9. *Ibid.*, 41-42.
10. *Ibid.*, 43.
11. *Ibid.*, 51.
12. Morgan Library does not offer centralized instant messaging assistance, but several College Liaisons Librarians offer instant messaging through Meebo widgets on their subject guides.
13. Massey-Burzio, "Reference Encounters of a Different Kind," 278.
14. Graves, "Implementation and Evaluation of Information Desk Services," 481.
15. Woodard, "The Effectiveness of an Information Desk," 456.

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