

## Introduction

Team Δ is charged to develop and oversee an implementation plan to create a comprehensive redirection and redistribution of staff\* efforts to improve user services. Building from the Libraries' Reference Vision and our shared experiences, the plan will:

- Create an understanding of the role(s) that each Public Services staff member will play.
- Help shape the Libraries' new five year Strategic Plan.
- Establish timetables and milestones through June 2006.

This document outlines specific actions over the next few years that will focus staff efforts in a collaborative and coordinated approach to further the MIT Libraries mission:

*... to create and sustain an intuitive, trusted information environment that enables learning and the advancement of knowledge at MIT. We are committed to developing strategies and systems that promote discovery and facilitate worldwide scholarly communication.*

This plan is also based on the belief that the following values are most central to our core mission:

- Focus on user needs
- Promote user self-sufficiency and life-long learning
- Be practical/pragmatic
- Be proactive
- Create satisfying, realistic jobs; provide staff with the skills, resources, information, and organizational structure to meet expectations
- Practice ongoing evaluation of services

## A New Service Model

The Reference Vision responded to a number of issues. There has been an overall decline in reference statistics but an increasing need for in-depth research consultations. There is declining in-house use of books and journals, yet an increasing use of web-based resources and services from remote locations. Instruction initiatives remain an important priority set by the Task Force on Student Life and Learning. In response to these issues and in an effort to transform our service model to focus our energy in areas that will have greater impact, the Vision articulated a service model where staff efforts are concentrated on enabling user self-sufficiency and easy access to subject or other expertise. It promoted experimentation, flexibility, and assessment.

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\* Please note that the term "staff" in this document is not limited to any particular employee category.

Progress towards the Vision has included initiatives both local and system-wide:

- In January 2003 the position of Coordinator for Central Reference Services was established to spearhead the development of the Vision's recommended Central Help Service (CHS).
- The first version of the CHS was established in September 2003.
- The Reference Committee created a series of training modules for Public Service Staff.
- Barker implemented an Integrated Service Point during the summer of 2003.
- The Humanities and Science Libraries created the Hayden Reference Group with the goal of improving the user experience in Hayden Library.
- Numerous staff throughout the Libraries have collaborated to create powerful self-help tools like the Business Database Advisor, Geodata Search Tool, Information Navigator, SFX, and Your Account.

Continued progress is needed, and this plan is designed to provide a coordinated framework for action. It is based on the following goals:

1. Developing a tiered information service model.
2. Developing a coordinated instruction program.
3. Conducting a thorough job and committee review within Public Services to create proper alignment of effort and realistic jobs.
4. Increasing user self-sufficiency.
5. Raising awareness of services and resources by developing a comprehensive marketing program.

While this plan is focused on Public Services, we believe its success will require a full partnership with departments across the Libraries and the careful alignment of organizational resources in support of its goals.

## **1. Developing a Tiered Information Service Model**

We have four recommendations for developing a tiered information service model:

- 1.1 Establish one service desk in each unit and define core competencies for service desk staff.
- 1.2 A virtual service desk (a.k.a. CHS) is available.
- 1.3 A referral system is available to connect users to required expertise in a timely fashion.
- 1.4 Develop an assessment strategy for this new service model.

### **1.1 One Service Desk**

Progress towards this goal has been made in many units. The branch libraries have long adopted this model of service. Over six years ago, Rotch became the first divisional library to move to an "integrated service point (ISP)." Barker created an ISP in the summer of 2003. While these efforts are to be applauded, continued experimentation is needed. Team Δ recognizes implementing an ISP in Dewey and Hayden (Humanities and Science Libraries) presents challenges that are unique to those libraries.

The new model proposed is based on the concept of “just-in-time” rather than “just-in-case”; that staff time away from the desk can be better focused on tasks and projects that will improve user self-sufficiency as well as meeting in-depth needs for specialized expertise. We believe that to fully develop this new staffing model requires creating a formal training program and the continued collection and analysis of service desk transaction data.

*Recommendation 1.1.1:* Team Δ works with the Circulation, Reference, and Processing Committees to create a new Service Desk Task Group. This new group will define the core competencies for customer service, circulation, basic reference and referral skills. The plan should be available to PSMG for initial review by December 2004 and should include a strategy for developing and documenting knowledge and procedures. Circulation Supervisors, Reference Coordinators, and Branch Managers will be responsible for training staff to competency levels.

*Recommendation 1.1.2:* Advocate for establishing a Training Coordinator position within the framework of the Libraries’ new five-year strategic plan. Included in the responsibilities for this position would be the oversight of training service desk staff in core competencies.

*Recommendation 1.1.3:* Working with local units, Team Δ coordinates a thorough analysis of transactions at service desks next fall semester to develop proper staffing models. Local units will have their analyses ready for review in February 2005.

*Recommendation 1.1.4:* Hayden (Humanities and Science) and Dewey Libraries provide an analysis of the facilities issues, e.g., space, signage, and collections, which need to be addressed to move to one service desk in each location. These analyses should be provided to the AD for Public Services by February 2005 to review budget and other resource issues that will factor into implementation timing decisions.

## **1.2 Virtual Service Desk**

Our past experiment with the Ask-Us Live Service and our current pilot with the Central Help Service (CHS) have given us valuable experience in developing an infrastructure for a tiered model. The CHS provides online and phone users with quick answers to easy questions and timely referrals to experts when required. Building on these experiences we need to shape the staffing and technical support necessary for long-term sustainability.

*Recommendation 1.2.1:* The Coordinator for Central Reference Services establishes a CHS Advisory Team to work with the Coordinator to shape CHS policies and procedures as well as advise on staffing and technical issues.

*Recommendation 1.2.2:* The CHS move to a reduced staffing model based on recommendations from the Sloan MBA team and the CHS assessment recently completed by the Reference Committees Assessment Subgroup.

### 1.3 Referral System

A tiered information model requires a strong referral system for success.

*Recommendation 1.3.1:* Based on the service desk transaction data gathered, each service point employs a staffing model that is based on a “just in time” service philosophy. A key component of this model has a reference and/or circulation specialist on-call for appropriate hours. Desk staff would be able to refer library users to the on-call staff. On-call staff would be available via walkie-talkie (or some other comparable technique) to allow for some freedom of movement when on-call. While we expect that this would be implemented throughout the system once the training program has been put in place and the analysis of service desk transactions is completed, experiments can begin in Rotch and Barker for fall semester 2004.

*Recommendation 1.3.2:* If more in-depth expertise is needed, service desk staff will refer users directly to appropriate subject or other expert with a clear understanding that the timeliness of the response from the expert will meet established guidelines. The Service Desk Task Group will develop the referral guidelines.

### 1.4 Assessment

*Recommendation 1.4.1:* Team Δ, working with the Reference Committee Subgroup on Assessment, creates an assessment strategy for this new service model to be presented to PSMG by February 2005.

## 2. Develop a Coordinated Instruction Program

Coordinated instruction programs are a key component to the goal of developing user self-sufficiency. The 1998 report of the MIT Presidential Task Force on Student Life and Learning states:

*Libraries also need to become more engaged with the teaching activities of the Institute... the need for students to acquire lifelong skills in locating, filtering, evaluating, and using effectively the wealth of information available to them.*

In response to this call the Libraries have seen an enormous increase in our instructional activity over the last five years. Dewey Library has developed the first formal, local instruction program, and that program has seen great success. We need to build on these efforts by developing other local instruction programs to meet the specific user needs in each library, and a system-wide program to bring coherence to our instruction efforts across the Institute.

*Recommendation 2.1:* Instruction Coordinators, under the guidance of the Instruction Committee, create instruction programs for local units. Local programs should be in place by Fall 2005.

*Recommendation 2.2:* The Instruction Committee coordinates the development and administration of common training and assessment techniques for instruction.

*Recommendation 2.3:* Upon completion of local programs, the Instruction Committee develops a system-wide program incorporating training and assessment. The system-wide program should be presented to PSMG for review by April 2006.

### **3. Conduct a Public Service Job and Committee Review**

The realignment of staff efforts to support this new service model requires a careful analysis of existing committees and jobs, both professional and non-professional, to insure resources are deployed properly in support of library goals and priorities.

*Recommendation 3.1:* Public Services begin a review of job content and descriptions where needed in order to reflect changing roles and responsibilities. Initial efforts will focus on positions affected by the CHS.

*Recommendation 3.2:* Working with PSMG the AD for Public Services conducts a review of committees and other groups to reflect the new service model.

### **4. Increase User Self-Sufficiency**

User self-sufficiency is a goal that supports improving the productivity of the MIT community and providing them with vital skills for life-long learning. Providing library resources and services that are easy to discover and use is a core part of our mission. Specific projects in support of this goal are many, varied, and often cross departments. Examples range from fully barcoded collections, to improved physical library signage, to cross-database search tools, to direct borrow capabilities from libraries beyond MIT. Initiatives advancing user self-sufficiency are often staff and resource intensive and require careful collaboration and coordination across library departments to insure proper alignment of priorities.

*Recommendation 4.1:* Within the context of the new five-year strategic plan, the Libraries' organizational structure is reviewed to align goals and priorities across departments to better enable user self-sufficiency.

*Recommendation 4.2:* AD for Public Services creates a small task force to look at consistency in terminology of signage in all MIT Libraries. This group will present recommendations to PSMG by January 2005 to be implemented by each library.

### **5. Develop a Comprehensive Marketing Program**

There is broad consensus that a comprehensive and coordinated marketing plan for the MIT Libraries will improve our ability to meet user needs and advocate for the resources necessary to sustain ongoing support for education and research at MIT. Because the services and resources the Libraries provide are broad and include all areas of the Libraries, Team  $\Delta$  believes this need should be a priority for the Libraries' new five-year strategic plan.

*Recommendation 5.1:* Advocate for a comprehensive marketing program within the context of the Libraries' new five-year strategic plan.

## Implementation Timeline

### July 2004

- Service Desk Task Group formed.
- CHS Advisory Team created.
- New CHS staffing model developed.

### July/August 2004

- Team Δ establishes methodology for capturing service desk transaction data.
- Team Δ works with Reference Committee Assessment Subgroup to begin creating assessment strategy.
- Hayden (Humanities and Science) and Dewey begin facility analyses.
- Instruction Committee continues work on training and assessment techniques for instruction.
- Signage Terminology Task Force created.

### September 2004

- Barker and Rotch experiment with on-call referral system.
- New staffing model for CHS begins.
- Public Services begins a review of committee structure and affected jobs.
- Instruction Coordinators in ESL, Humanities, and Rotch begin developing local instruction programs.

### December 2004

- Service Desk Task Group presents core competencies plan to PSMG.

### January 2005

- Signage Terminology Task Force presents recommendations to PSMG.

### February 2005

- Service desk transaction analyses prepared by local units and presented to Team Δ.
- Hayden (Humanities and Science) and Dewey Libraries' analyses of issues surrounding the creation of single service desk at each location presented to AD for Public Services.
- Assessment plan presented to PSMG.

### September 2005

- Tiered information service begins.
- Local instruction programs implemented.

April 2006

- System-wide instruction program presented to PSMG.