

Where did the reference desk go? Transforming staff and space to meet user needs

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ABSTRACT

A sharp decline in the number of reference queries prompted the library administration at Indiana State University to begin a project to combine the circulation, reference, and IT desks to reduce staffing at a new consolidated service point. All faculty and staff in the reference/instruction and circulation units participated in the project. The new arrangement and subsequent removal of librarians from routine desk duties have expanded instructional opportunities, consistent with the university's goals. Project participants plan further assessments to better determine the impacts of the new service arrangements.

KEYWORDS

Academic libraries; cross training; merged desk; project planning; reference; student workers; user services

Introduction

Association of College and Research Libraries (ACRL) statistics for libraries in doctorate-granting institutions indicate that, nationwide, the number of reference transactions declined from 21.3 million in 2001 to just 9 million in 2012, a drop of 57% (ACRL, 2004, 2013). These figures have led academic librarians across the country to question the prominent place their reference operations now occupy. Maintaining a separate reference desk with librarians who are asked questions that could be just as easily answered by a student worker is increasingly viewed as a luxury that university libraries cannot afford. Administrators at Indiana State University's Cunningham Memorial Library (CML) interpreted these trends no differently than their colleagues elsewhere, that is, that the library, to remain viable, could not continue to tie up so many resources in a service whose use was dwindling.

This article describes the process undertaken at CML to eliminate its reference desk by consolidating its public services operations (circulation, reference, computer support) into a single point of contact. The presence of librarians would be reduced and, in time, eliminated altogether. The Indiana State University (ISU) experience was characterized by its extensive statistical and literature review and involved all



members of the department. The planning phase of the project lasted 11 months to permit sufficient attention to detail.

Description of institution and public services

Indiana State University (ISU), established in 1865, is a doctorate-granting institution located in Terre Haute, Indiana. The university is comprised of six colleges and offers over 100 majors. The 2015 academic year began with the university's highest enrollment ever: 13,584 students. ISU provides a focus on community and public service, having been named number one in the nation by the Washington Monthly for community service participation and hours served in 2013, 2014, and 2015 (Washington Monthly, n.d.). ISU combines a tradition of strong undergraduate and graduate education with integrated teaching, research, and creative activity in an engaging, challenging, and supportive learning environment to prepare productive citizens for Indiana and the world.

In the summer of 2013, the previously separate Circulation and Reference departments at CML were combined into a new Public Services Department, consisting of nine librarians, eight staff members, and about 25 student workers. The goal for this organizational restructuring was to facilitate the combination of the library's circulation and reference operations and create the conditions in which librarians could be removed from spending so much time at the separate reference desk answering general, nonskilled questions.

Before the consolidation, patrons entering CML were presented with various service options. Three separate desks (circulation, reference, and computer support) were all within 50 feet of each other. Workers at these desks would often have to direct patrons from one service point to another, a game Leuzinger (2013) calls "pass the patron." At the same time, the staffing and scheduling of three different desks were complicated and inefficient.

The reference desk was staffed by seven librarians for 56 hours a week, about 20% of their time each week. During their desk shifts they would answer numerous directional, ready reference, or equipment-related questions but only about 1.6 major reference queries each hour during a 6-year period from 2008 to 2014. In 2014, the number of major reference queries dropped to just one per hour. Although they worked on other projects at the frequent slow periods during their shifts, the atmosphere was not conducive to sustained or concentrated effort. Given the decline in reference interactions, library administration determined that spending so much time at the desk was not a good use of the librarians' time. Librarians' commitment to staffing the desk had the result of limiting the amount of time they could devote to instruction, liaison activities with academic departments, and developing new programs. The administration considered these additional areas as opportunities of emphasis for the librarians.

The separate computer support help desk was hidden behind a half wall that shielded it from the view of patrons entering the library. The desk was staffed by student workers who were hired by and reported to a manager in the university's

Office of Information Technology. That manager, however, worked in a distant part of the campus, had multiple other responsibilities, and was unable to provide the close supervision that student workers often require. She was eager to combine the computer support help desk with the library's single service point so on-site supervision of the student workers could be assumed by the library.

Based on these observations, when a vacancy occurred in the Reference Department chair position, the Library Dean filled the position with the understanding that Reference would be combined with Circulation to create a new Public Services Department. The Dean directed the new chair to investigate creating a single desk without librarian staffing.

Literature and statistics review

The literature on consolidating public service desks and on the place of reference within such an approach is vast and ever expanding. The scholarly interest in the subject is not surprising, since so many academic libraries are rethinking their desk operations in light of declining reference activity, budget cuts, and changing user expectations.

At the very outset of this article the ACRL statistics for doctorate-granting institutions were cited indicating a 57% drop in the number of reference transactions in the 12-year period ending in 2012 (ACRL, 2004, 2013). At ISU this decline hasn't been as precipitous; nevertheless, in the 5-year period ending in the summer of 2014, reference transactions had fallen 45%.

With our declining reference transactions in mind, our literature review focused on revamping the three public service areas of our library (reference, information technology [IT], and circulation) into one; making it easier for patrons to locate the assistance they need. We were interested in how other academic libraries worked to consolidate their functions and create a cohesive unit of public services for their faculty and students in view of the drop in reference transactions.

A second concern for the literature review was looking at cross-training; do we maintain a reference desk with librarians or train students and staff to replace librarians at a single desk where patrons could receive reference, circulation, and IT assistance? What hours would the desk be open, and who would work the desk and provide the services? If librarians did not staff the desk, how would patrons receive indepth research assistance? These were questions we hoped an extensive literature review could answer.

The decline and eventual demise of reference has been a recurring motive in the scholarly literature for years. David Lewis, in his provocatively titled article "Traditional Reference Is Dead, Now Let's Move on to Important Questions," described the phenomenon as far back as 1995. Lewis (1995) believed a new paradigm for the mechanics of providing information was needed for libraries to be successful in the forthcoming move to electronic formats for information. From the more-recent literature, the authors found the point-counterpoint exchange between Watstein and Bell (2008) and the thorough summary by Miles (2013) to present balanced accounts of the pros and cons of eliminating desk-based reference services. Their findings made the Executive Team realize that there is no single, correct way to construct a library's desk and reference services. In the end, it always comes down to what is best given the local conditions.

New libraries provided the impetus for some to remodel their public services. Davidson and Mikkelsen (2009) had the opportunity to reinvent reference services at their institution, and they decided the reference desk was an outdated model of service. Their Merced campus building focused on creating services that did not require a librarian presence at the desk to assist patrons. The authors provide a thoughtful analysis of what is important in providing services to academic library patrons. Love, Brzeski, Sabbar, and Unterholzner (2005) describe combining the three services of reference, computing, and media into a single point staffed by students and cross-trained professionals when their library opened in a new building at Carthage College. Their experience was found to be particularly compelling, and the ISU project benefitted from their insights on staffing, training, and triaging. Crane and Pavy (2008) discuss creating a single service point at the University of New Orleans by repurposing their existing circulation desk, an approach followed at ISU. Following a common refrain, they believe libraries often merge to maximize services and make better use of staff in the library. Their staff experienced a decline in questions, and the librarians believed their presence at the desk was no longer needed. If paraprofessionals and students work reference or public services, librarians can use their time more productively to assist faculty and students with research needs.

The consolidation of public services desks has been discussed in the literature even longer than has the imminent death of reference. The Brandeis model was first described in 1992 (Massey-Burzio, 1992). The account of the recent desk consolidation at the Georgia Tech libraries and the subsequent phone conversation with the authors underlined the importance of organizational restructuring in a project of this type. Their experience provided strong evidence for the decision to unify ISU's previously separate Circulation and Reference departments into its new Public Services Department. Wang and Henson (2011) also comment on how combining the desks would free librarians for other duties.

The key design issues necessary for a successful combined desk are capably described by Meldrem, Mardis, and Johnson (2005). Crane and Pavy's (2008) experience at the University of New Orleans' library closely resembled that at Indiana State. A good overview of reference assessment strategies is provided by Etches (2013), while Johnson, Jennings, and Hisle (2011) describe how such a consolidation can lead to a greater sense of unity, a development the present authors did not always witness.

The possible consolidation of our public services led to another concern: How do we provide quality reference, IT, and circulation assistance to our patrons? Several articles discuss creating a triage method to provide varying levels of service. Meldrem, Mardis, and Johnson (2005) describe moving from a reference desk to a two-tiered system to a "one-stop shopping" model for their patrons, a progression followed at ISU, in which our reference desk was eliminated and a customer service desk was created. With this model, the librarians provide reference services from their offices, and students provide assistance at the customer service desk.

From our review of the literature, it was clear we had many options to revamp our services for the students and faculty at our library. We only had to determine which services were the best fit for ourselves and our patrons.

Site visits

Visits to nearby libraries accompanied the literature review. Groups composed of representatives from throughout the department were chosen to conduct two of these visits, and the department chair made five others on his own. These visits allowed them to observe different approaches to providing public services while carrying on discussions with their librarian hosts.

Several public services operations were observed during these visits. The largest libraries, similar to the Cunningham Library, had consolidated their public service desks and no longer required librarians to help staff them. They used a triaging system to route circulation and ready reference tasks to trained students and staff while difficult queries were referred to librarians. One smaller library, at a private institution, still utilized separate reference and circulation desks, another had a separate reference desk that had long been staffed only by students. The site visits reinforced the importance of the triage model in place at those libraries where reference librarians did not have scheduled hours at a separate desk. This routing or triaging did not always appear to work very well at some of the libraries visited. Good communication between the desk staff and the reference librarians is a prerequisite of effective triaging. Observations led to the conclusion that libraries with a single services point seemed more apt to practice good communication and to successfully triage.

Project organization and planning

The purpose of the project was to create a thorough list of recommendations that project members could then submit to the Library Dean. Leadership of the project was exercised by an Executive Team that was responsible for deciding the structure of the project, assigning people to teams, ensuring deadlines were met, and settling disputes. It was formed approximately one month before the project began and was comprised of both faculty and staff members.

The project included five additional teams created to research and develop a plan for each part of the project: assessment, reference/triage, design, staffing, and training. These parts were then divided into two phases: Phase 1 (assessment, reference/triage, and design) was scheduled to be completed in five months, Phase 2 (training, and staffing) was given three months, and two months in the summer were set aside for training. The Executive Team organized the teams to recognize the department members' preferences, experience, and expertise and to ensure equal representation of faculty and staff on each team.



Project specifics

After the Executive Team identified the principal parts of the project, the teams had the responsibility for working out the details in their separate areas reference/triage, staffing, training, design, and assessment. The Reference Team reviewed four areas of contact between the staff and patrons: chat, e-mail, telephone, and in person at the desk. They created a three-tier system for answering these queries. Tier One consisted of basic information that any staff member or student should be able to provide, including questions such as directional and known-item searches. Tier Two questions required more knowledge about the library resources: for example, opening and closing the library building, searching databases, enforcing the noise policy, and providing assistance in choosing a topic for research or creating a search strategy. The Tier Three level was considered the most advanced and usually involved a librarian. Examples of Tier Three activities include searching complex databases (SciFinder, ArtStor), locating government publications, answering billing inquiries, and executing complex EndNote functions. These tier levels were chosen based on a modified READ scale (Gerlich, n.d.).

From the initial introduction to providing librarian contact for the patron, the triage system provided structure for the staff and students working the reference desk. The reference interview allowed the desk worker to clarify the request and the resources needed by the patron. With this knowledge, s/he could determine who should address the question. Depending upon the tool the patron used to contact the library (e-mail, chat, telephone) and the complexity of the question, the desk worker might forward the question to a librarian or give the patron that librarian's contact information (Figure 1).

The charge of the Staffing Team was to develop a personnel model for the newly formed Public Service desk. A review of the library's statistics indicated that the majority of reference interactions occurred between 10 a.m. and 6 p.m., Monday through Thursday, and from 2 p.m. to 9 p.m. on Sunday. This 39-hour-per-week schedule was adopted by the librarians in the semester after the desks were consolidated, a decrease from the previous 56-hour schedule. The semester after that reference librarians were removed from the desk altogether.

More student workers were needed to cover the shifts previously staffed by reference librarians. This assistance was provided by the Office of Information Technology (OIT), which now joined in staffing the single service point for public services. OIT recognized that its students would have to learn the basic circulation and reference tasks required for the desk. In return, the library would provide oversight to these students who were previously unsupervised.

With the help of these IT workers, there were enough students to staff the desk despite the reduced presence of librarians. However, many were ill-prepared to answer even Tier One reference queries, nor had they been trained in how to triage more-complicated queries. The triage matrix created by the Training Team succeeded in identifying the specific tasks included in each tier level; now a plan was needed to teach those skills. Based on Dick, Carey, and Carey's (2009) model for

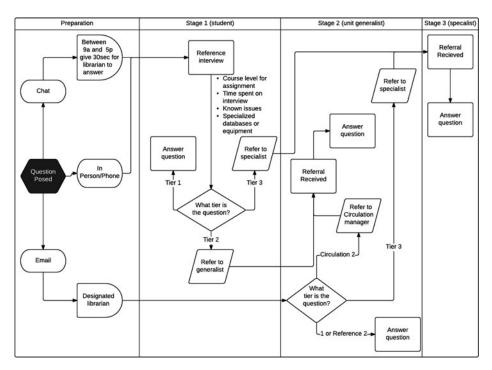


Figure 1. Triage algorithm.

instructional design, the Training Team conducted an analysis of learner needs, and the findings were used to create an instruction plan. The plan consisted of four parts: a Blackboard course, peer and master observation, workshops, and ongoing training. Blackboard was chosen because students were familiar with the product, and it allowed for streamlined testing. It was used to introduce learners to the core concepts of working the desk. Peer observation gave learners the opportunity to experience what they learned in the modules firsthand in a controlled environment. The traditional classes covered topics such as advanced searching methods, specialty databases, and the reference interview. Lastly, ongoing training in the form of a blog and help manuals with procedures and examples helped learners to keep up to date on new procedures and knowledge and to give them step-by-step guides for executing infrequently performed tasks.

Some of the most important parts of the project were to initiate a tiered approach to providing reference, create a staffing model that had student workers, not librarians, at its core, and to begin training exercises designed to prepare those students for their expanded role. The Assessment Team suggested measurement methods to determine if these goals were being met and whether issues arose that would require a department response. Team members interviewed various staff members of the department to determine collective goals and concerns, aggregated the responses, categorized them, assigned priorities, and used these data to create outcomes. They also established appropriate measurement methods to collect data relevant to the outcomes. Mixed measurement methods were favored because all methods have

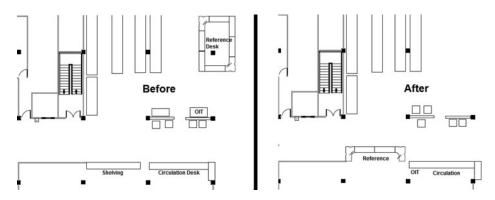


Figure 2. Floor plan before and after.

some limitations, and a mixture would provide a more-complete view of the project's success.

A variety of potential measurement methods were proposed, but the team recommended that the library start with inexpensive, simple ways of collecting data: for example, assessing the effectiveness of training by examining the scores on the trainings tests. More expensive and time-consuming assessments could be added later and at levels manageable by employees and their workloads. These could include a patron satisfaction survey, tests to measure students' knowledge of the triage process, and an examination of logged chat files to determine how accurately students answered the reference queries they received.

The Design Team was formed to develop a plan for the merger of the physical service space of the reference desk, circulation desk, and the IT help desk. The team's objective was to determine the location and configuration of a combined service desk as well as consider the overall design of the first floor of the library. This last was necessary since some thought that traffic flow throughout that floor, where all the library's public service points were located, was inefficient and might adversely affect use of the combined desk. The team settled upon a low-cost option that would use existing desk pieces but in a new location (Figure 2).

As with any major project, fostering communication and disseminating findings to stakeholders was a crucial element in its success. This was done utilizing three methods: presentations, project planning software, and reports. Presentations were held at key points in the project. The first was given by the Executive Team to the entire department, the Dean, and the Associate Dean. During this time, the teams and library administrators were informed of the purpose of the project, and the expectations for each team and team member were described. Each presentation was followed by an extensive question-and-answer period. At the end of the phases, each team presented its research and resulting recommendations to the rest of the department. The project planning software was a way to communicate both in and among teams. TeamworkPM was chosen as the platform of choice for managing the deliverables and communicating. Lastly, to communicate to administrators, project

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reports with executive summaries were created and distributed to both library and university administration.

Discussion

In February and March 2013, CML hired two outside consultants to conduct a broad survey of ISU's library patrons (Clareson & Bishoff, 2013). Over a thousand students, staff, and faculty responded to the survey, and the resulting data provide an excellent snapshot of library services just five months before the library's desk consolidation project began. The survey revealed widespread satisfaction with the library overall and with the service offered at its freestanding reference desk, 92% of the respondents were either satisfied or very satisfied with the library as a whole, while the assistance available at the reference desk was overwhelmingly considered to be both "very important" and "satisfactory." A comment from one respondent neatly summarizes these data, "The best thing about the Library is the books, but really close behind that is the excellent and extremely helpful library staff. I get personal, individual help from someone in the Library every week" (Clareson & Bishoff, 2013, p. 10).

Given these positive survey results, why was CML so eager to eliminate its freestanding reference desk? Statistics present another means of looking at the library's reference service before the desk consolidation was initiated at the beginning of the 2015 fiscal year. The data are not as positive as those summarized in the report just described. Table 1 shows the total number of patron interactions that took place at the freestanding reference desk in the 3 years prior to its consolidation with the circulation and IT computer support help desks. Included in those figures are various minor interactions, such as answering directional questions, ready reference, and equipment queries, mostly about printers. More significant is the precipitous drop in the number of major interactions occurring at the reference desk, for these were complicated queries that required librarian assistance (Table 1). Why the decline in reference questions when patrons' comments are so positive? One explanation lies in the current ubiquity of tools such as Google and Wikipedia. Persons who in the past may have consulted a reference desk for quick answers now need only consult their smartphones.

These findings show that, while the number of all interactions decreased only slightly, the number of major interactions dropped 51% in just 2 years. Also, as can be seen, the percentage of major interactions as a part of all interactions occurring at the desk also dropped—in 2012 almost half of all interactions involved

Table 1. Major interactions per year.

Year	All interactions	Major interactions	% of interactions	Change
2011/12	12,792	6,053	47%	_
2012/13	12,058	4,135	34%	-32%
2013/14	11,172	2,944	26%	-29%

Table 2. Chat and e-mail interactions per year.

Year	Chat queries	E-mail queries
2013/2014	1,557	141
2014/2015	2,148	160

complex queries appropriate for librarian intervention, while in 2014 that fraction had dropped to just over a quarter. They also show major interactions decreasing. In 2012, nearly half of reference interactions involved complex queries; by 2014, only about a quarter of interactions fit that category. At the same time, the number of minor reference questions increased by about 25% during the same period.

As expected, the absence of a separate reference desk staffed by librarians has led to an increase in chat and e-mail queries. Chat queries jumped 38% in the year after librarians were removed from the department's combined desk, while e-mail queries rose 13% (Table 2).

Activity at the other two service desks in the library—circulation and computer support—is not quite as easy to establish prior to their consolidation. The library had seen a steady decline in its circulation activity over the period in question, dropping from over 178,000 in 2008 to about 80,000 in 2014. At the same time, it experienced an increase in its gate count, reaching over 430,000 in the year immediately before the merger of the desks. The computer support help desk, which, as we have seen, was previously managed by the university's IT department, only began keeping statistics after the merger. Since that time 1,620 purely IT interactions have occurred, or about 135 a month.

The data suggest that, prior to consolidation of the three service desks, some of the traditional library services, circulation of printed materials and in-person reference, were declining dramatically, while use of physical space of the library, as measured by its gate count, was increasing. The survey results included in the "ISU Library Services Impact and Assessment Survey Report," nevertheless, indicated that library patrons had an overwhelmingly positive view of the library as a whole and of its public services in particular (Clareson & Bishoff, 2013).

However, the promotion of information literacy was now deemed more important by library administration in student success and retention than reference. Fulfilling this goal required that the librarians spend more time teaching. The time at the reference desk prevented additional pursuit in this area.

When evaluating whether the desk consolidation has been successful, therefore, it is appropriate to determine if the department's librarians have actually spent more time teaching. Prior to the consolidation of the three desks, seven librarians staffed the reference desk for 56 hours a week, each librarian working about eight hours at the desk every week. The first semester after the consolidation they worked 39 hours at the desk, and in the semester after that their desk duties were eliminated entirely. Table 3 summarizes the instructional activity of the Public Services librarians during the last 4 years. The data show that a temporary decrease in instructional activities occurred in 2014, the last year before the consolidation of the library's service desks.

Table 3. Instructional activity per year.

Year	Sessions	Attendees	Hours
2011/12	413	8,479	437
2012/13	418	8,244	401
2013/14	335	6,360	344
2014/15	537	8,028	574

In the first year after that consolidation, there were significant increases in the number of instructional sessions offered, attendees at these sessions, and the total number of hours the librarians devoted to teaching. It is curious, however, that the number of attendees in 2015 has not reached the level it attained in either 2012 or 2013, although the number of sessions and hours far exceeded the figures reached in those years. This can be interpreted to mean that the number of one-on-one consultations with patrons has increased. At the ISU library, these consultations have always been considered as instructional activities because they are viewed as an opportunity to teach the patrons searching skills, not just to provide them with an answer. With librarians no longer staffing a freestanding reference desk, it stands to reason that the number of these consultations would increase. The 2015 data show that the librarians are indeed spending more of their time teaching. But they are not reaching more students than in some recent years.

Public Services librarians have initiated a new teaching activity that started just before the desk consolidation and has greatly expanded thereafter. These instruction activities were usually single hour-long sessions, often embedded in freshman English classes, or, as we have seen, one-on-one consultations. Presently, librarians are teaching an array of half-semester or semester-long classes that are listed in the university catalog, where they are noted as the instructor of record. This has considerably raised their profile on campus and is in line with the expectations of university administration. They are, however, both labor intensive and time consuming. In the first year following desk consolidation, five such classes were taught by librarians. These classes covered traditional library topics such as research skills and information literacy, but they also dealt with subjects such as criminology and meteorology.

Librarians had several concerns about the changes taking place within the department and the merging of the Reference and Circulation desks into the Public Services desk. By what means would students be trained to answer general and subject-specific reference questions? Librarian knowledge and expertise would be difficult to duplicate in training undergraduate students. After all, the students working the desk were undergraduates; all librarians had at least a graduate degree in library science with some holding additional advanced subject degrees.

The removal of librarians from the reference desk stirred passionate debate—several librarians liked working the desk. They enjoyed the interaction with patrons and prided themselves on excellent customer service, which was acknowledged by positive feedback from our customers. Concern was strong that the quality of assistance the patrons would receive from students would be substandard in comparison to assistance from a librarian. Assurances that difficult questions would

be forwarded to librarians did little to reassure them that this was the right move. Another point librarians raised was the fact that librarians always staffed the desk. This was a fundamental duty that was being taken away; would an identity crisis ensue? Librarian concerns and objections were acknowledged but did not sway the library administration from moving ahead with merging the two departments into one.

Currently the Public Services desk is staffed by student workers who forward difficult or time-consuming questions to librarians. Although librarians still have concerns that patrons may not be advised of all the resources available to answer their questions, they have accepted the reorganization and created ways to be accessible to patrons requesting their assistance. Business cards with librarian contact information are handed out by the student workers to patrons needing additional assistance. Librarians also monitor chat and e-mail, answering questions. Weekly library office hours are held by reference librarians, with additional weekly office hours in their liaison departments.

Conclusion

The Public Services Department merged its information desks and restructured its staffing in an effort to better provide high-quality reference services to patrons while still meeting its other responsibilities. A systematic methodology was used to determine what was known about similar projects at other universities to endeavor to follow best practices and avoid potentially costly mistakes.

Several lessons were learned. It was important to become familiar with the views of the decision makers and committees as the project developed to make the final proposal persuasive and compelling. Engaging the entire department in the process promoted buy-in. It did not eliminate dissension or solve all problems, but the ensuing discussions help to identify the areas of conflict, to acknowledge and validate the different perspectives, and started the commitment to finding solutions. Site visits also allowed an evaluation of merged desks after a published report. Discussions with multiple people at site visits provided a variety of views and sometimes uncovered issues not mentioned in an institution's publication. And in the face of insecure employees nervous about the change, it was important to evaluate whether the merged desk was continuing to provide the quality service of which the Public Services Department was proud in order to soothe apprehensions.

Has the desk consolidation project at ISU been a success? The statistical evidence is equivocal. The number of desk interactions, including major interactions requiring librarian participation, has dropped sharply. But it is thought that many of the reference interviews formerly conducted at the reference desk, and which would have been counted as major interactions, have now become one-on-one consultations and are counted as instructional statistics. Reference has not necessarily decreased, but the means of intake has changed as they come through the librarians' liaison and teaching activities, not by patrons stopping at a special desk. Since librarians no longer staff that desk, they have more time to devote to their instructional

responsibilities. In fact, instruction has increased, and the librarians are incorporating it into the curriculum in new ways. Their immediate emphasis is on promoting information literacy, which is seen by the university as a means to advance its student success and retention priorities.

In order to fully discover how our change has affected the staff and patrons of the library, the Executive Team will carry out more assessment activities and monitor our gate count, chats, and reference queries. Proposed questions to be considered include: How does the increased information literacy integration affect questions asked at the desk? Are our student workers successfully answering Tier One reference queries and referring more complex questions to librarians? If there is a large decrease, or a shift to higher-level research questions, how does the library address it? Additional assessment will be used to determine the reactions of patrons and staff to our changes. Regardless, the Public Services Department is committed to providing information literacy and high-quality instruction using the best methods possible.

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