SLIDE 1: Welcome to Creating a Stir: Using Gimlet in Public Services
First of all I would like to thank the organizers of the Access Services Conference for this opportunity to talk about the Gimlet software and how we broadened its use beyond the Reference Desk. Our speakers are Rose Marie Mendoza, Access Services Manager; Cynthia Becht, Head of ARCHIVES and Special Collections, and me, Rhonda Rosen, Head of Media and Access Services

SLIDE 2: A bit about ourselves….

- Founded in 1911, Loyola Marymount University is a private, Catholic university in Los Angeles. Our student population:
  - 6,000 undergraduate
  - 2,000 graduate
- 60 undergraduate majors.
- 36 master's degrees, 1 Education doctorate, 12 credential programs

SLIDE 3: VON DER AHE vs. HANNON
In the fall of 2009, we moved from a small town, slow moving, traditional library to a flashy new student oriented library hub in the center of campus.

As one of our librarians has said, we went from being a Honda civic to a BMW!

With the new Hannon Library, everything changed – including our gate count which doubled the first year we were open!

SLIDE 4: NEW INFORMATION COMMONS

We now have a sleek new "Information Commons" instead of the old, traditional reference area.

The Information Commons was given 70 dual-boot.. I-Macs instead of the 17 Dell PCs we previously had for public use in the old library.

And, we were told at the last minute that we would be open 24/7…

All of this happened exactly when the entire campus began to focus its attention on assessment and evidence-based practices.

Our reference team astutely realized that a new way was needed to collect data in this high traffic area as a way to support the university's mission to become a learning organization.

SLIDE 5: They looked for a new way to gather data to assist them in staffing this new area and to answer the following questions:

CLICK   How much staffing did they need?
CLICK   When did they need the most staffing? Daytime, nighttime, holidays?
CLICK   which type of staff? Librarians? Student workers? IT assistance?

SLIDE 6: (Gimlet Logo Slide) The choice was Gimlet!

STAY ON SLIDE 6 (Gimlet Logo slide):

What is Gimlet?

Gimlet is a web-based, hosted software solution used to record information at service desks.

It is an excellent inexpensive way to gather questions asked, gather statistics, and create various reports.

It's easy to use, costs only $10.00 per month/per site, and is customizable.

Click SLIDE 7 (Hannon Info Desk Gimlet Screen):

This is what the main Gimlet screen looks like.

You can see **5 basic categories** to describe the query [point each one out]: *Duration, Question Type, Asked by, Format, and Location*. You can customize the choices within each of the categories, using free text to fit your needs.

Looking at the Reference Desk screen,

Duration gives you a place to record how long the question took. You can create your own lengths of time.

Under **Question Type**, it was decided to have 4 selections, Directional, Policy, Reference and Technical. We chose these types as we had just moved into this new building, with new technology, new policies, and very little signage.

Now going to Location category – Months after starting to use Gimlet, the Reference Team established a roving reference service outside the library. Because Gimlet is so flexible, it was easy to add this to their location list and assess this new service.

For public services desks **the Question & Answer** categories are the most helpful function. This is the area where you would write the full text of the question and answer of each encounter. As questions and answers are added, you begin to build your database. These full texts can be searched and edited.

Moving to Tags- Gimlet uses Tags, like other platforms do. In order to give meaningful assessment data, this area needs to be more structured than the free-form question & answer areas. Ours Tags were created based on our most frequently asked questions.

The levels in the **Difficulty category are based on the READ scale**. This stands for "Reference Effort Assessment Data Scale." You'll hear more about the READ scale later in the presentation.

Time of question- The system automatically time-stamps the question at the current moment. However, you can edit the time in order to reflect the actual time period of the transaction. This is helpful when it gets too busy to record your question and answer while the transaction is occurring.

And **now Initials –** This identifies the person who records the question and answer. Consistently using this feature allows supervisors to follow up with staff who need further training.

CLICK NEXT SCREEN SLIDE 8 (Searching results screen):

This is the searching screen; I mentioned that Gimlet is a searchable database that you create by recording questions and answers. Here I did a search within the Circulation site on the term "borrowing books." This is what the results look like [note the categories – date, initials, etc. -- are also shown]. I could have searched all our sites to see how other service desks answered questions about borrowing. And if I clicked on star to the left…it will highlight the best answers so they rise to the top of the results screen.

CLICK SLIDE 9: OVERVIEW Report

The Overview report in Gimlet offers a couple of quick and easy ways to create reports. This screen gives you a snapshot of the categories and choices you selected to record on your main Gimlet screen. This report shows a graph and breaks out statistics based on the timeframe you select.

CLICK SLIDE 10: DETAILED Report

This detailed report shows you an example of another report we like to run. We've chosen "Hour of the day" and "day of the week" and "start and end" date. This gives us evidence about the number of questions asked during each hour, so we see which hours were busy or not.

By reviewing your reports, you can discover trends and patterns at your service desk.

And, all your reports can be exported with the Download feature, giving you the options for Microsoft Excel, GoogleDocs, or OpenOffice.

SLIDE 11: ACCESS SERVICES USES GIMLET

After the Reference team implemented Gimlet, they found it to be a flexible software that could do exactly what they needed.

They introduced it to the librarians, and trained those of us who work Reference desk.

By the end of the first year, it became apparent that this might be a tool for the other public service desks to gather their desk statistics also.

So, our two Access Services areas -- Circulation/Document Delivery and Media & Reserves -- along with the Archives & Special Collections department all adopted Gimlet.

The Reference department trained all staff who worked the public desks and we introduced it to our desk students as part of their training.

After Reference's successful first year using Gimlet, Access Services purchased its own site license which included all of its four areas: Circulation, Document Delivery, Media and Reserves. We modeled it closely on the Reference department's template, assuming we were a similar desk with similar patron encounters. We introduced our new site to all Public Services staff and then to the student work force.

To emphasize it to the students who worked at our public desks:

- Reference, Access Services and Archives and Special Collections added Gimlet to the agenda of our Student Workers Pizza Party - a workshop dedicated to all aspects of the service desk experience, held each Fall. We made a special point to talk to the students about what Gimlet was, why we thought it was important for them to use, and showed them a quick "how to" use it, reinforcing what the Work Study Supervisors were also going over in their desk training.
- Access Services also created a section on how to access and use Gimlet on its Blackboard page as a reminder to students.

- We created a chart explaining each Question Type, along with specific examples of each type of question to be kept at each counter.

At the end of two years, the Public Services departments prepared a report for library Administration on our use of Gimlet. The analysis allowed us to realize a number of things about how we were using Gimlet in Access Services.

SLIDE 12 (REPORT PROBLEM)

As I said, when we began using Gimlet, we created one department site license for Access Services - with a separate location for each desk–(Circulation/Document Delivery AND Media/Reserves. In doing our year end statistics, we were asked to report on the two locations separately.

Gimlet allows you to create reports using only two parameters at a time. So, for instance, we could get statistics on how many *questions by month* and by *question type*, but we couldn't get that 3rd parameter *of location* at the same time. So, we had to do a lot of separate searches by location and question type, and then by location and month - and fold them into each set of statistics by the Circulation unit and the Media/Reserves unit. So, of course this led us to the realization that we needed to create a separate site for each desk for easier and more specific analysis.

SLIDE 13 (TAGS)

We found that the use of tags was not consistent. For instance, we found that people used "water fountain" and "Drinking fountain"; "directional" and "directions"; "wi-fi" and "wireless" just to name a few. We found that our students were incredibly creative in their vocabulary, and not always the best spellers! We sat down with our staff and examined the tags we had used from Reference's original glossary. We pared down the list of tags, making fewer and more appropriate tags, hoping to make it easier for the students to use them properly. We also decided that it was important for us to create a "NO TAG" selection to be used when the student couldn't find the appropriate tag. This way, when we gather statistics on the use of tags next year, it will be cleaner and more consistent.

Using the READ scale – We did not consider using the READ scale as a priority, nor did we push our students to use it. We assumed that a high percentage of questions asked at the Circulation and Media/Reserve desks were going to be simply directional --and, in fact, the report confirmed that 70% of our questions were exactly that. When we moved into the new library, it was decided that the Information Commons was to be the central source of reference help, and that Access Service desks were to refer to them for these types of questions, so it was not a surprise that only 7% of our questions were reference.

However, as staffing has changed this year, and the Reference department is using fewer librarians and more students at the Information Commons desk, we need to see if the type of questions change (and if our student training will need to be changed so that they can answer more complex questions) –and so we will be asking our students at the Circulation Desk in

particular, as they share the area closest to the Info Commons, to think about the questions they are being asked, and to rank them using the READ scale.

And, finally, we realized that our Work Study Supervisors can use Gimlet as a great tool for training and evaluating their students' work. We have asked our Work Study Supervisors to examine the Questions and Answers of the students on a weekly basis, noting incorrect answers. In this way, the Supervisor can immediately follow up with the student and make sure they are given the correct information. Because of the ease of reviewing student encounters at the desk, Supervisors can see areas that need extra training, as well as having handy data of excellent or poor performance to discuss with their students as a part of their student evaluations.

We have also asked them to make sure students are always recording questions – always a tough job!

SLIDE 14 (A&SC)

Archives and Special Collections employs different methods of Access Services – for one thing, we don't "circulate" materials beyond our borders. But our assessment needs often cover the same terrain, asking questions of our customer service such as "How well do we interact with our users?" "Do we meet their 'access to collections' needs?" "What can we do to improve our service?"

Like Access Services, the staff stationed at our desk is responsible for all first response activities: they greet all visitors, and provide ready answers to queries (or refer queries to a consulting librarian). They also register researchers, check rare materials out to them for use in our secure reading room, and keep an eye on all who enter our public spaces.

Before we began to use Gimlet we were using hash marks to record our traffic and usage statistics. As we became a much better used department, this proved to be overwhelming and inefficient. Hash marks also did nothing to improve the knowledge base of our staff.

SLIDE 15 (A&SC Stats Screen)

To get a sense of our interaction with the public, here are some statistics from last year:
1,158 students in 52 classes, many of whom were given class assignments that required them to return as researchers
1,116 gallery visitors
116 participants in 15 tours
549 registered on-site researchers

Our first report tallied 708 transactions recorded in Gimlet.

SLIDE 16 (Rachel and Rachel)

How did Gimlet Change our Customer Service?

1. Almost immediately, the Archives and Special Collections team was able to build our collective knowledge. In our area we have specialists who really know one aspect of the collection very well (manuscripts, rare books) because they work with it but they are less familiar about other collection areas. With Gimlet as our cumulative searchable database we were all able to find ready answers for complex reference questions if they'd been previously asked.   "Which archival collections contain the best resources on European immigration?" Even better, our answers became standardized – especially helpful if many student researchers are coming to us with the same question for a class assignment. Like Access Services supervisors, I could see more easily what my people know and could institute quality control measures and specific training sessions as needed.

2. We changed the way we staff our front desk. In the first years, we continued to staff it predominantly with 4 full-time librarians and our one paraprofessional. If we had graduate student interns or an especially experienced undergraduate student, we added them to the desk schedule as well. This year we increased our undergraduate student workforce and trained them to take on the front desk, placing full-time library staff on call. Gimlet made this transition easy because we had spent two years recording answers and building a knowledge base for student assistants to lean upon. Special Collections inquiries can be daunting; Gimlet is a calming device. Except for very busy reading room moments when the on-call staff need to be helping our students, we are seeing staff freed up to be more productive with their back-of-house responsibilities.

3. All front desk staff had to become more aware of their interactions with the public, be able to analyze what had taken place, and to make time to record them. This did create a new challenge which we are constantly striving to eradicate. Quite frankly, our reference statistics went down during the first year of Gimlet use even though we knew we were handling more researcher inquiries. Part of our team-building discussions includes remembering to commit to creating that knowledge base for each other.

4. We like Gimlet. We are finding ways in which Gimlet can record other data we've been wanting to document. This year we added the term Facilities under Question Type to record how many

times we need Facilities help with our environmental controls or to correct other building issues. This means we're sometimes the ones asking the question. When we analyze this year's activity, we will need to exclude this Question Type category in some of our reports. We've also separated our researchers into two categories: "first time" and "returning" in order to analyze repeat visits and to see if we can pinpoint the class visits that most successfully engaged students to become comfortable as researchers of special collections

SLIDE 17 (A&SC READ Scale)

1. Unlike Circulation and the Media/Reserves Department, we decided to use the READ scale immediately to identify the difficulty level of the query. . The READ scale is meant to supplement statistics you are gathering; it helps illuminate the levels of skill and knowledge that staff need to answer questions.
2. We adapted the Reference Department's "READ definitions" sheet, replacing example queries with ones more likely to be fielded by us. I wanted to know the percentage of ready reference questions we receive versus in-depth complex reference questions.
3. Anyone staffing our desk is expected to be able to handle transactions at levels 1 and 2; possibly level 3 if they feel ready. Students staffing the desk are told to refer the most challenging questions (levels 4-6) to a full-time staff member.

SLIDE 18 (CLOSE-UP of Levels 1 & 2 A&SC READ Scale)

Levels 1 and 2 cover the same basic questions that any service desk is likely to receive. [Go through examples under Levels 1 and 2 on the chart]
Level 3 requires basic searching skills and, for us, an understanding where to look (OAC, online catalog). Levels 4-6 require multi-format, multi-collection searches.

SLIDE 19 (A&SC Report sheet)

4. Our first report showed an interesting psychological phenomenon. In spite of initial training and reminders, front desk staff – whether librarians, paraprofessional, or student – across the board tended to rate the difficulty of the answer instead of the difficulty of the question combined with what you did with it. Experienced librarians who knew the answer to a complex research question would rate it as low as level 2, even if they spent time on gathering the answers, ranking them at the same level as our policy questions ("are you open on weekends?"). And students or interns would rate basic questions at a much higher level if they weren't sure of the answer. You can see from this report that READ levels 1 and 2 are by far the most often recorded category. As a result, the special collections team met for a debriefing on the Gimlet analyses, retrained ourselves, agreed collectively to make some changes with clarified

definitions. [Reference Department reported encountering similar tendencies so this is not a department-specific phenomenon].

SLIDE 20 (IN SUMMARY: BENEFITS)

So to summarize Gimlet:

Benefits:

- It's customizable and can be adapted to any kind of library service desk; it can be tweaked and improved to capture the data you're after
- It provides a robust and ever-expanding knowledge base that you create
- It helps to standardize customer service responses across many types of staff. We can also standardize some aspects of our customer service across different service desks to create meaningful library-wide reports.
- It makes an excellent training tool both to introduce customer service guidelines to new desk assistants as well as to continually improve staff through analysis and discussion.

SLIDE 21 (IN SUMMARY: BENEFITS)

Challenges:

- To provide accurate statistics, all service desk staff must consistently use Gimlet.
- Even when used, Flexibility in Customization has a way of inviting unwanted creativity / inaccurate usage
- It takes time to stop other activities and report each transaction into Gimlet
- Ideally all service desk managers must communicate with each other to agree upon choices for standardization. At LMU we formed a Heads of Public Services working group to work on various policies and procedures we feel are of common interest; designing our Gimlet sites was one of our first projects.

SLIDE 22 (THANK YOU)