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Improving the patron experience: Sterling Memorial Library’s single service point

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ABSTRACT
This article describes the planning process and implementation of a single service point at Yale University’s Sterling Memorial Library. While much recent scholarship on single service points (SSPs) has focused on the virtues or hazards of eliminating reference desks in libraries nationwide, this essay explores the ways in which single service points can improve the patron experience by bringing together circulation, information services, and library privileges. It begins with an overview of the process at Sterling, including the library renovation that enabled our transition. After laying out the planning, training, and implementation phases of the single service point, the essay presents the major issues with which SSPs must contend (staff expertise, integration within the library, and designing a space to suit both staff and patrons) and considers the potential of such service points to improve library services.

Introduction

Many academic libraries are contemplating reducing their frontline services to a single service point. The motivation varies from library to library, though two related concerns stand out: adapting to drop-in patron traffic and improving the patron experience (Allegri & Bedard, 2006, p. 33). In conjunction with shrinking budgets, reduced demand has pushed the single service point to the center of conversations about the future of frontline services. The number of reference transactions has decreased at many institutions, as have circulation numbers (Association of Research Libraries, 2012). In conjunction with these decreases, complex reference questions and the demand for full reference services have diminished for many institutions. In light of these shifting priorities, basic patron questions regarding known-item searching and other navigational issues are perhaps more easily resolved by way of a single operation that combines light reference with circulation and other frontline services. If each public desk in the library offers the full suite of services, we can also provide a more consistent experience across multiple desks and presumably
improve the user experience. A single point of service that combines circulation, reference, library access, and technology assistance presents an opportunity to create a new service model that will simultaneously address the evolving challenges facing libraries while still meeting the needs of library patrons.

The conversation around single service points has focused in particular on the loss of the reference desk: Can libraries combine circulation and reference services? In 2012, the Access Service management team at Yale University’s Sterling Memorial Library (SML) began its own transition to a single point of service. Reference librarians had not staffed the traditional public service desk since 2008, when the library recognized a significant decrease in in-person reference questions. In their place, high-level Clerical and Technical employees (C&Ts) were trained to handle low-level reference questions and to offer referrals as needed at a new Information Desk. This change was largely successful. Frontline C&Ts were able to handle most questions that arose, providing answers or referrals as appropriate, and reference librarians were given the freedom to immerse themselves in outreach, bibliographic instruction, research consultations, and other responsibilities. Thus, our move to a single service point was driven primarily by a desire to improve the patron experience and to integrate the many services performed by Clerical and Technical staff across Access Services.

Our goal was to create a one-stop shopping experience for our library patrons by merging the services offered at three desks (Circulation, Information Services, and Privileges) in Sterling Memorial Library. In addition to the convenience of a single service point for our patrons, consistent high-level customer service could be offered from a staff with a much broader scope of knowledge of library services and policies all hours the library is open.

In this article, I will outline Sterling Memorial Library’s planning and experience for transitioning to our new service point as well as the work required of newly formed Frontline Services staff. I will also discuss the challenges that Access Services currently faces, including the location of the new single point of service, retrofitting services in a new space, and offering an effective training plan for desk staff.

**Renovation and initial plans**

The opportunity to rethink our service points presented itself in June 2011, when Yale University received a generous gift in honor of Yale President Richard Levin and his wife, Jane Levin. President Levin could choose how the funds would be allocated at the university and decided to dedicate the funds to the restoration of the grand hall, or the “Nave,” in Sterling Memorial Library, which had not been touched since its opening in 1930. At the dedication ceremony in October 2014, Levin stated that, during his tenure at Yale, it “weighed heavily” on him that he never had a chance to allocate university funding to the upkeep of the Nave. The money would be used not only to clean and restore the grand hall, but to create a modern space for Yale students, faculty, and staff without jeopardizing the integrity of the original 1930s gothic architecture (Yale News, 2014). Helpern Architects of New York City would lead the project.
Renovation began with a facelift and update for key features. The limestone and sandstone surfaces had become so dirty over the last 80 years that the varicolored stones were indistinguishable from one another. G. Owen Bonawit’s stained glass windows, depicting the history of New Haven and Yale University, were also cleaned and, in some cases, repaired (Yale University Library Gazette, 1931, p. 93). According to David Helpern, founder of Helpern Architects, one of the most complicated tasks was the installation of HVAC (heating, ventilating, and air conditioning), as the majority of the nave is constructed of solid stone, and there were few “hollow spaces” through which ductwork could be installed (Dunlap, 2014). Finally, the woodwork, plaster, and ceilings were thoroughly cleaned as well.

As the architects planned for both aesthetic and functional updates, the Access Services management worked closely with library administration and stakeholders to identify opportunities to modernize the space and services. The project created new study spaces and a self-service area for checkout and scanning. The project plan also identified the need and creation of a single point of service, a location that would draw together all of the frontline operations of Access Services in order to make our patrons’ experience more user-friendly and intuitive. Prior to renovation, three service points operated in different parts of the Nave, carving up the various functions of frontline operations. Circulation Services were offered at the main desk at the rear of the Nave under the mural “Alma Mater.” Information Services operated at a separate desk further back down the Nave, at an angle from the main desk. Finally, Library Privileges worked out of a private office space behind Information Services. Patrons often wandered from desk to desk, unsure of which group could best assist them. Our challenge, then, was to marry three very different services at one desk as well as to design the space that could support this new operation.

Our goal was to create a functional space that would allow patrons and staff to seamlessly transition from one type of service to another, from library account troubleshooting to circulation, from a general question about the library system to light reference questions, or from questions about our collections to a referral to a subject specialist. We proposed the following: one main desk to be used for most basic services like circulation and general library inquiries; a space for a service lead person that would allow for oversight of the desk; and two desks set behind and to the side for longer transactions including patron registration, account troubleshooting, and more detailed questions about our collections and services. The single service point, in other words, still required certain internal divisions in the allocation of staff time and expertise, but these divisions would not be apparent to the users, thus allowing them the ability to approach and receive assistance from just one designated service point.

In a meeting in November 2011, the architectural firm presented the Access Services management team with preliminary floor plans based on our shared vision. We provided feedback on the new design and talked in great depth about those workflows and services that would inform future decisions about the space as drawings and plans evolved in the coming months. With planning for the new physical
space underway, our focus shifted back to the development of a service point that would successfully merge circulation services, information services, and our privileges operation.

**Training and troubleshooting**

Developing training plans for the new service point involved two related challenges. First, we had to plan for appropriate levels of coverage at the service point, including oversight by management and senior staff members. Second, we needed to ensure that staff received adequate training in each area of service. We were able to address both issues through a department-wide reorganization of over 50 clerical and technical staff members from Sterling Memorial and Bass Libraries. The reorganization took the better part of a year to plan and implement as we reviewed services and workflows across eight separate units. Job responsibilities, tasks, and workflows were reconfigured across both libraries to form three new departments within Access Services: Frontline Services, Operations, and Resource Sharing and Reserves. The Operations unit handles all backend processes, including retrievals, shipping, and stack maintenance. Resource Sharing and Reserves is responsible for course reserves, interlibrary loan lending and borrowing, and fulfilling scan requests. Frontline Services staff are responsible for covering all circulation, information services, and library privileges, and in addition to the single service point in Sterling, they staff the desk at the Bass Library (attached undergraduate library) and the Microform Reading Room also located in Sterling.

One question arose first: How should we allocate staff? Our understanding of staffing needs had depended upon the services being divided across multiple service points, each of which had different rhythms for demand and use throughout the day. There was thus some guesswork involved. Ultimately, we underestimated the number of staff needed per shift, a problem we were forced to address on the fly after implementation. Through a series of retirements, staff departures, and small intradepartmental reorganizations over the last two years since the reorganization, the Frontline Services team reached adequate staffing levels. Fourteen C&Ts comprise the Frontline Services staff who cover three service points. Seven of these work nonstandard schedules.

My responsibilities as the new Librarian for Frontline Services also changed dramatically. I was now responsible for managing three different services points—the Bass Library and Microform Reading Room desks and our new single service point in Sterling. To ensure oversight of the day-to-day operation of the service points, we created four lead positions as part of the reorganization: one for each desk during weekdays and one to cover all three in the evenings and weekends. The lead person serves as the scheduler, trainer, and troubleshooter at each service point, offering staff and students immediate assistance and, when required, more-advanced problem resolution. Questions or problems that are more advanced or require input are referred to myself as the librarian in charge of the Frontline Services team. Placing
a lead person at each service point frees me to focus on project work, plans for new services and service improvements, and professional advancement.

Training our staff members was, perhaps, the most challenging aspect of the reorganization. The scope of responsibilities for the Frontline Services staff member became complex and extensive. No individual staff member had prior experience in all service areas. Each required extensive training across three service desks, SML, Bass, and the Microform Reading Room, each with varied services and workflows.

We offered two phases of training: group training first, then one-on-one. In December 2012, the month prior to the implementation of the reorganization, the Access Services department, with the help with several reference librarians, offered a series of introductory group training sessions on major processes and procedures. Frontline Services offered sessions covering circulation, library privileges, media circulation, searching the online catalog, and article searching. Group training was offered in various forms. Some job responsibilities, like circulation, were offered as live demos, introducing all features of the circulation module and covering standard procedures. Other sessions were offered as a presentation followed by hands-on experience in a classroom, such as our review of the privileges operation. We shared a PowerPoint presentation on account creation with the staff, who were given the opportunity to practice setting up fake patron accounts and receive feedback on their work.

In January, we transitioned away from group training to one-on-one training at each service point. Each staff member in training was paired with the service point’s team leader or librarian. One challenge was immediately apparent: The Frontline Services team did not have the luxury of working through training at each service point by starting with the tasks and workflows that were easiest and working toward the more complex. All staff were thrown in head first, bouncing between desks with radically different workflows (library card creation to circulation to light reference). Team leaders and managers provided the one-on-one training, so each spent roughly 5 to 7 hours each day simultaneously covering the service points while also training staff. The whole team was exhausted and overwhelmed. It took roughly six months for all staff members to feel comfortable in all aspects of their new position. It is important to note that all of these changes to the department structure were implemented just five months in advance of the beginning of construction for the renovation project. Reorganization training and adjustments were being done simultaneously with planning for the creation of the single point of service in Sterling.

**Implementation**

The Frontline Services team was due to move into the newly renovated space in August 2014, which afforded the group 20 months to experiment with variations in workflows and procedures at a single service point. The goal was to determine how services could function when the point of service was reduced to one main transaction desk and one “long” transaction desk. In that time, Frontline Services
occupied two different spaces in Sterling Memorial Library, allowing the team to experiment with its setup and determine where different or discrete services were best handled.

Frontline Services began by merging the Information Services and Privileges operations into one service point in Sterling Memorial Library in January 2013. This change was particularly significant, as the new configuration would test our belief that services could be reduced to two desks and still provide high-quality patron interactions. In this iteration, our circulation desk was used for shorter transactions, and our merged Information Services/Privileges desk was used for longer transactions. Patrons approached the circulation desk with questions about library accounts and light reference questions and were quickly referred to the Information and Privileges office for the necessary in-depth consultation.

In May 2013, construction commenced, and the Frontline Services team moved out of the Nave and into a temporary location, also located in Sterling Memorial Library. The work on the renovation in the Nave was too extensive to continue services in our previous location. This new space gave the Frontline Services unit yet another opportunity to develop and experiment with the arrangement of the service point. This temporary service point more closely approximated the plans for the new space; our main desk and long transaction desk were not only in the same space but also in close proximity to one another.

The 15 months spent in this room were invaluable. We reviewed our services and their associated workflows and procedures before officially moving into our renovated space. We resolved the following questions: Should we offer full library access transactions at the main desk, or were they best offered away from the main service point, in a more private space that allowed staff to have more-focused conversations with our patrons? Can any of the privileges work be done at the main desk? Should all light reference work take place at the main desk or, like library access questions, be handled in a more intimate space? How much time should be spent answering a question at the main desk? We also examined staffing levels: How many Frontline Services staff should be scheduled at the desk each hour? By the time we moved into our new space, the Frontline Services team had a solid understanding of our desired workflows. Approximately two staff members, with the lead person as backup, were needed to comfortably staff the desk. Any transactions that would take less than 2 minutes, like circulation, quick reference questions, fine payments and basic privileges transactions, like account updates, could be handled at the main desk. All transactions that would take more than 2 minutes, like library access card creation, account troubleshooting, and questions about fines and fees were handled at the long transaction desk. In all cases, library users went to a single service desk to initiate those transactions.

Lessons learned

The renovation was completed on time in August 2014, and the Nave officially reopened on August 25. The new service point was beautiful. The wooden
furniture had all been custom built. The architects had even preserved a piece of the 1930 circulation desk to create the new one. We had one main service point for brief transactions, a space for the lead person that kept her close to the service point, and two desks where longer transactions could be held as needed. Because of the 15 months in the temporary location and active collaborative work to answer the questions outlined in the previous section, the transition to the renovated space went remarkably smoothly with a minimal disruption to essential services. The new desk is typically staffed with two staff members with the team leader on hand to help answer questions and provide additional coverage if the desk is busy.

The renovated Nave did not come without problems. Designing a space and the services to match it simultaneously brings challenges in terms of communication and foresight. Seemingly minor aesthetic choices can affect the ease and comfort with which staff carry out their responsibilities. Since the renovation was completed, Frontline Services has looked for work-arounds to unanticipated problems, including location, space challenges, and training issues.

**Location, location, location**

One of the major goals when designing the new space was to preserve the view of the Nave from the main entrance, which includes Eugene Savage’s mural “Alma Mater,” centered just above the old circulation desk, the symbolic “altar” of the library. To achieve this, the service point has been set back between two stone pillars, about halfway down the nave, making the desk hard to see upon entrance into the Nave and creating confusion for patrons who are looking for assistance. The security guards who sit by the entrance to the library are often the first ones approached with questions. We recognize the importance of a more-prominent service point for our users. Library administration and the access services management team are currently in discussions about relocating the desk, either by moving it further forward into the nave or finding an alternate location so it is immediately visible from point of entry. When we reduce service points to a single point of contact, the desk needs to be more visible, more central to the space, in order to orient patrons. Having eliminated the need for patrons to bounce among several service desks, the library must nonetheless observe the importance of foot traffic and visibility.

**Integration and noise**

Though the service point is not visible from the library’s entrance points, we are still close to students’ day-to-day activities and library events. Upon opening, the service point was adjacent to a popular study space, so Frontline Services staff were regularly surrounded by students who used the space to read, work on projects, or socialize. We found it difficult to strike a balance among staff responsibilities at the desk, the noise of students studying and conversing, and the privacy of our patron interactions. In order to meet the needs of both our staff and our users, we changed the student study space into additional staff space and converted a conference room
into additional study space. We no longer compete with one another to be heard, and we now have the ability to have private conversations and the ability to perform more focused work at our service points.

When the library was renovated, it was designed to hold both student functions and expositions, which poses another, similar challenge for the Frontline Services team. Student groups are often invited into the nave to display project work, sing, dance, or play music. These types of exhibits and performances have drawn crowds of students, staff, and faculty back into the Nave and, perhaps even more importantly, the library. The Frontline Services desk is in the midst of the activity, often surrounded or even blocked by displays or crowds, which is disruptive to our work and to those who need our assistance. We recently came to an agreement with Library Administrative Services to close down our service point during these events, as services cannot carry on in the midst of a crowded, noisy library space. Patrons who require staff help will be directed to the neighboring Bass Library for assistance.

**Usability**

Seemingly minor cosmetic details have proven to be surprisingly challenging for our operation. The desk, for instance, is small and narrow, which impedes our ability to run our services effectively. When the desk is staffed with two people, they are within such close proximity to one another that it can be challenging to sustain a focused conversation with our patrons. A merged service desk also requires significantly more equipment than service points dedicated to separate tasks. Because of the space limitations, the equipment that we would prefer to have on the desk had to be relocated to other spaces behind the service point, which affects our efficiency. Our users require space for their library materials or, particularly in recent years, laptops and tablets. They frequently have questions about items on screen, such as catalog records, database search results, or e-resource questions that require some light troubleshooting. Our limited desk space makes it challenging to have a productive and comfortable discussion with students.

We have made some short-term modifications to the desk to create more space (using smaller monitors, for instance) and are looking to make more extensive modifications to the desk to better meet our service goals, offer more focused services, and provide students and other constituents with an approachable and comfortable place to ask their questions. When developing a new single service point, cosmetic details are not merely matters of aesthetic preference but in fact shape the way we interact with our patrons. The relocation of multiple services to a single point of service, with the increase in foot traffic and the several demands made of staff, only magnifies this concern.

**Training**

The single service point has also presented challenges in terms of training and the maintenance of job knowledge. Prior to the reorganization, all staff were embedded
in specialized units such as Privileges. Immersion in these operations made staff experts in their respective areas. With the change to a single service point, there is a notable loss of specialization.

Several things contribute to this change. The learning curve for a Frontline Services employee is immense. Staff are currently responsible for offering circulation services in two libraries, circulating media equipment, answering or referring questions about our massive library collection of print and electronic resources, troubleshooting e-resource problems and library account problems, staffing our virtual reference service, and drawing from their knowledge of a complex set of library privilege policies to provide library access to groups within and outside of the Yale community. The staff spend their days rotating between desks in both SML and Bass, so they have lost the opportunity to truly immerse themselves in the work in each area and gain the level of expertise required for that service point. This loss of expertise is, perhaps, most notable in our Privileges services, which is now combined with our circulation and information services. For staff to gain a thorough understanding of this immense operation, it would be more beneficial to have someone individually dedicated to this service during their shift. Though, again, separating our circulation services and information services from privileges would begin to break our model of single services, the benefit of offering higher-quality service cannot be ignored. We are currently investigating the reconfiguration of our service model to address this problem.

Finally, prior to the reorganization, there were very few lead C&T staff overseeing the workflows at each service point. Managers were heavily relied on to assist in oversight of the service, training, making low-level decisions and ensuring that workflows and procedures were executed properly. There are now four team leaders, who are embedded in each service area, assisting staff with questions, making judgment calls when there isn’t a clear-cut answer to a question or problem and helping train new staff members. While it has been extremely beneficial to have this type of oversight, this has also contributed to a loss in a thorough understanding of job knowledge. Specifically, the team leader’s role has changed from its intended focus as discussed during the reorganization: Instead of offering support primarily for challenging questions and decision making, the team leader has become the go-to person for some of our most basic questions about standard procedures. That is, our team leaders often become bogged down in the more basic operations of the service point, while staff at the desk do not properly internalize more complex operations or learn to solve problems independently. Without changing this service layout, how do we offer the right level of support to staff without enabling them to learn only their most basic job responsibilities? This is a question to which we do not yet have an answer.

**Conclusion**

In implementing a single service point at Sterling Memorial Library, we confronted a series of related challenges: reconfiguring the physical location and layout of our
service point, training C&T staff members across a wide range of specialized policies and procedures, and finding ways to provide consistent customer service in a space while adapting older workflows and processes. Despite these challenges, this change to a merged service point has been largely successful. Library patrons are able to approach any Frontline Services staff member for the help they need, even if that help takes the form of a referral, for a wide range of questions. Additionally, the types of service we offer are well aligned with the current needs of our users in circulation, information services, and library access. As more libraries consider the single service point as a model, it is important to base decisions around the needs of both patrons and staff in order to create the best possible customer service environment. We have found that the service desk would better serve our patrons if we were located in a place that is easily visible and accessible and also offered staff an environment that is conducive to strong job performance and quality customer service. Additionally, the services we offer to our library patrons would be more consistent if we had spent more time training Frontline Services staff members in all areas of responsibility at the single service point. Single service points have great potential to offer a more convenient and consistent experience for our library patrons while also creating a more adaptable and knowledgeable staff. There are also, as this essay has outlined, considerable challenges for training and implementation. The single service point at Sterling Memorial Library is an ongoing project, and as we continue to develop and refine the service, we will work to provide the best interface between our patrons and the larger library system.

References