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## One-Stop Shopping: Merging Service Points in a University Library

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## One-Stop Shopping: Merging Service Points in a University Library

As libraries change to meet the evolving needs of our patrons, including the development of online services, many libraries are considering consolidating physical service points to maximize staff and better serve the in-house patron. This article describes the planning, implementation, and evaluation process involved in merging the circulation and reference desks at the University of New Orleans Library. The cross-training process is described in detail, and benefits as well as problems experienced are outlined. The authors also provide advice for those considering a merger at their library.

Keywords: public services, reference, circulation, cross-training, service points

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Abstract: As libraries change to meet the evolving needs of our patrons, including the development of online services, many libraries are considering consolidating physical service points to maximize staff and better serve the in-house patron. This article describes the planning, implementation, and evaluation process involved in merging the circulation and reference desks at the University of New Orleans Library. The cross-training process is described in detail, and benefits as well as problems experienced are outlined. The authors also provide advice for those considering a merge at their library

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## **Introduction**

The concept of single service point for an entire library is not a new one. In the small special or public library it is frequently necessary to combine reference, circulation, and other user services at one desk because of space and staffing limitations. Medium to large academic libraries that have traditionally followed a multiple service point approach are increasingly finding it necessary to adopt the single service point model in order to maximize service to users and better utilize available staff. This article outlines the results of an experiment at The University of New Orleans Library to combine service points. It describes the motivations for the merger, the process itself, benefits gained and problems experienced, and offers advice for others who might be considering a similar merger in their library.

## **Motivations for Change**

In Fall 2004, The University of New Orleans Library housed several service points, the most visible of which were the reference desk, the circulation desk, and, to a lesser degree, the multimedia collection desk (which housed audio-visual materials, microforms, and equipment). Due to an unforeseen exodus of library staff, we suddenly found it difficult to maintain adequate desk coverage with the staff available. The circulation and multimedia desks—housed under the larger department of Access Services—went from being double staffed to being single staffed. This frequently left the lone staff person in either department overwhelmed at busy times. The multimedia desk was sometimes being closed for lack of staff, placing an even larger burden on circulation. When one staff person called in sick, it left others in Access Services scrambling to fill in.

Of course, lack of available staff was not the only motivation to change. Reference staff had been experiencing a steady and dramatic decline in questions, and librarians often felt tied to the desk at times when their services were not needed. Between 1998 and 2004 the number of reference transactions fell by 77%. Use of the print reference collection was also steadily declining in favor of online databases and tools, making the physical location of the reference librarian increasingly less relevant. Electronic database interfaces were becoming more intuitive, affording students and faculty more autonomy in their research. At the same time, reference librarians were expanding their roles as subject specialists with departmental liaison responsibilities. Collection development tasks were becoming increasingly sophisticated and the instruction and outreach functions became more central to the work of those traditionally considered “reference librarians.” The amount of time spent sitting at the reference desk was increasingly out of balance with the new focus on outreach and instruction.

A separate issue was the “blurring of lines” between desks. Although some questions asked at either the circulation or reference desks clearly fit into the categories of “reference” or “circulation,” many of the questions overlapped the two areas or involved multiple services. Users often did not know which desk to consult about a particular issue. Though the circulation and reference desks were located on the same floor, they were in separate rooms and the multimedia desk was on another floor entirely. Staff of both desks would often wind up “passing” users back and forth between the desks, resulting in disjointed service and frequent miscommunication.

All of the factors above suggested that a merged service desk might be an appropriate solution. Library Administration embraced the idea because, in addition to the reasons above, the entire process could be completed for little to no money.

### **Cross Training: A Three Semester Process**

When the idea of utilizing reference and access staff more efficiently was evolving, the first obvious step was to begin cross-training all available staff. The first group of trainees was composed of three volunteers from Access Services. This pilot group went through about six weeks of training for about 2-4 hours per week in reference functions. During this time we developed a training manual for access and reference functions, including a reference “test.” Using feedback and comments from the pilot group of trainees we were able to refine the training process and materials. Input from this first group was crucial in developing a training program for all public services staff. It was at this stage that we could really ascertain what skills were appropriate for staff in either department to master, and to develop a realistic plan for staff to acquire those skills.

After the basic training was complete, the pilot staff members began taking on 1-2 hour shifts at the reference desk. At first the trainees shadowed reference librarians, but after a few weeks they began working alone. By the end of the first semester we had expanded our pool of available workers for all of the major service points, and now had the tools to expand the training to all public services staff.

The pilot trainee group served three purposes. First, they expanded the pool of staff that could be called upon in an emergency. Second, they were the poster children for success of the developing cross training program. The pilot group showed other staff that the process was worthwhile. Third, the volunteers helped us

to refine the processes and procedures in a way that we could not have done otherwise. Soon after, more volunteers presented themselves.

After learning from the pilot group, we made some changes to the training program. Instead of training amidst the hustle and bustle of the semester, we decided to take advantage of the more sedate intersession period for training. We also decided to break the training into two groups depending on the skills to be acquired, and to cut the total training time down to three two-hour sessions (six hours total). After the initial training, all staff were asked to “trade” two desk hours per week with the other desk, so that newly acquired skills would not be lost.

Circulation staff were instructed on reference interview, types of information sources (directories, handbooks, statistical manuals, etc.), major databases, when to use the internet, when to refer, etc. Reference staff were trained on checking material in and out, pulling Reserves and ILL materials, taking fine payments, creating brief item records on the fly, answering directional questions, and creating cards for special borrowers. The cohort groups were kept small to ensure that participants could get adequate practice time in at the new desk.

After a semester of implementation, staff began to see that there was some benefit to increasing their knowledge of another service point, and to having more people available for back up. Once everyone became accustomed to working as a team it became apparent that if the reference and circulation desks were combined each staff member could work fewer hours at the desk, and have all of the back up help they needed. With a little persuasion, staff came to see that if each person gave a little (in acquiring new skills) they could all gain a lot (more flexibility and time to perform

“off the desk” tasks). This psychological transformation then became the catalyst for our physical transformation.

### **Making the Switch**

Because of the layout of our particular library it made the most logical sense to have reference and circulation services work out of the existing circulation desk. The reference desk was not easily visible from the lobby, and the circulation desk was both immediately visible and a larger, more accommodating structure. Statistics helped us to determine that the peak times for reference librarians to be on the desk were 10am-2pm and 6pm-10 pm on weekdays. We established an “on call” system, in which a designated librarian was available via walkie-talkie during off-peak hours. The idea of using cell phones or pagers was explored, but it was determined that a walkie-talkie would be the most efficient way to contact a librarian when immediate assistance was required.

While members of each department wound up using their new skills to some degree, neither group felt overwhelmed with new duties, and although some reference librarians admitted to feeling embarrassment when having to ask a circulation staff member for assistance in completing tasks, they generally seemed happy to work fewer but more meaningful hours at the desk. Newly trained Access staff could handle basic reference questions, but were knowledgeable enough to know when to call for help. With this newly designed system, each reference librarian could work about half of their previous amount of desk hours, but still remain accessible to users. When participants began showing a willingness to learn and help others during peak times, the respect and cooperation grew.

### **Fears and Opposition**

Change is difficult for most of us, and we encountered our fair share of opposition during this process. At first, some Access staff disliked the idea of acquiring new skills. These staff members perceived learning new skills to be the same as doing a librarian's job for them. Feeling drained already, these individuals dreaded the idea of taking on the duties of another department. There was a sense among Access staff that the librarians' work would be "dumped" on them.

Reference librarians expressed other concerns. One fear was that they would lose some status among users. Another fear was that librarians would wind up handling routine tasks instead of the duties for which they had expertise. A third and more problematic fear was that if reference librarians were no longer located in the same space (near the reference collection) students would not know where to go for help.

### **The Katrina Effect**

The full merger was complete by May of 2005, just three months before Hurricane Katrina devastated the Gulf Coast. The main campus of The University of New Orleans closed on August 28, 2005 and did not reopen until December of that year. Though the library collection sustained some damage from mold due to lack of air conditioning, the library and most of the campus escaped catastrophic flood damage. However, most library staff members were displaced for the entire fall semester and about thirty percent fewer staff returned for the spring semester. The remaining staff quickly realized that our pre-storm staffing level would now be considered luxurious. Because of our previous work, however, we were able to adapt to our radically changed environment rather than be destroyed by it. The benefits of the merger became more obvious to all after we had truly been put to the test.

### **Assessment**

In June 2006, one year after fully implementing the merged service point, we distributed a simple, informal questionnaire (Appendix A) to the remaining staff who had participated in the merger, in order to try to assess the value and effectiveness of the change. When asked to characterize their overall experience of working at the merged service point, 100% of the respondents rated it as either very positive or positive. Interestingly, the reference staff were somewhat more likely to rate the experience as very positive than were the access services staff. Similarly, all staff rated the experience as either “Very Valuable” or “Valuable” for library staff. When asked about the perceived value of the merged desk for patrons, 80% rated it “Very Valuable” and 20% rated it “Valuable.” There were no negative ratings of the value for either staff or patrons. Finally, participants were asked to characterize the training they received. While 30% found it “Very Effective” and 50% found it “Effective,” a small number (20%) gave it a neutral rating. The comments submitted along with the ratings were useful in identifying areas of concern and success. Concerns that still need to be addressed include higher noise levels in the lobby (making reference interviews difficult), and lack of confidence in handling questions or functions outside area of expertise. Benefits mentioned by the staff include increased knowledge, more flexibility with time, team mentality, and a better experience for the patrons. These benefits and concerns are elaborated on below.

### **Benefits to Patrons**

The most obvious advantage to patrons of a merged service point is the ability to get a range of types of assistance at one location. Patrons do not have to visit one desk to pay a fine and a different desk to learn how to search a database. One member of our staff commented in the survey that “. . . it is definitely better for

patrons to not be bounced from desk to desk as sometimes happened before.” For many patrons, not having to figure out which desk offers which services is probably an additional benefit. Some patrons are not clear on the difference between “reference” and “reserve” and there are times when a basic information or circulation question can quickly evolve into a more complex research question. The patron doesn’t have to guess where his or her questions fit or discern whether a question is appropriate for a specific level of staff or not. In their article titled “New Service Models: Can Consolidating Public Service Points Improve Response to Customer Needs?” Pat Flanagan and Lisa Horowitz (2000) ask, “Should the onus be on the patron to understand which library staff members are librarians and which are not, and what that really means in terms of assistance?” (p. 330). With a single “help” desk we are hoping to alleviate at least some of the anxiety and confusion that many patrons experience in seeking library assistance.

Another way that patrons benefit from a merged service point is that they are likely to encounter more broadly knowledgeable staff who can make sense of their questions more easily. In the old model, reference staff had only a very vague understanding of exactly how the circulation system worked and of what the rules were, simply because they had little opportunity to use it. At the same time, circulation staff could answer very basic information about OPAC record screens, but their ability to help would reach a wall if more complex interpretations were required. Now, a cross-trained staff person can help a patron with more than just a narrow group of questions, and can reliably apprise the patron of the wide range of service options available to them.

A third way in which patrons benefit from the single service point is that staff are more mobile and able to assist patrons easily beyond the confines of the physical desk. In our old two-desk model there were times at both circulation and reference when a single staff person was assigned to the desk. The staff person would be unable to leave when a patron needed extended assistance away from the desk (using equipment or finding a book in the stacks, for instance). Now, since there is typically at least one other staff person available to provide basic assistance, a staff person can roam about the library with a patron without worrying about leaving the desk unattended. It's been especially helpful for reference librarians who want to be able to spend more than a few minutes with a patron who has a question that requires more than a quick database search. Knowing that the circulation staff person can probably get a patron started on a research question, or at least reassure him or her that the librarian will be available shortly, makes it possible for librarians to immerse themselves in real reference questions.

### **Benefits to Staff**

While we would have liked to be able to reward staff who took on new responsibilities and learned new skills with better pay, we weren't able to do this and had to look for other, less tangible benefits. In the literature on merged service points, as well as in our own staff survey, one of the clear benefits to staff is increased confidence and knowledge. Staff learn from one another, not only through the formal training process, but by observing each other during more complex interactions that demonstrate depth of knowledge and expertise. Flanagan and Horowitz (2000) write, "Working together makes all staff smarter about the broad range of user needs and interactions, the particular areas of expertise of each staff member, and the range of

methodologies through which staff meet user needs” (p. 330). Staff learn not only specific skills and processes, but they learn “who knows what”—who is the best person to refer specific kinds of questions or problems to.

Another benefit voiced by our own staff in our follow-up survey is an increased level of job satisfaction. For many staff members, being able to perform a greater variety of tasks is rewarding in itself, and the addition of new responsibilities may represent an increase in status for them. Another pleasurable aspect, for some staff members, is the more dynamic environment that promotes continued learning and involvement in larger issues of the library than would arise from a more narrow conception of one’s job. Like the reference librarians surveyed in Frada Mozenter’s article (2003), “Cross-Training Public Service Staff in the Electronic Age: I have to Learn to do What?,” our professional reference staff appreciated the opportunity to focus on more sophisticated and complex reference questions (p. 402). Because of the way we are staffed now, which provides a kind of tiered service for much of the work day, a greater percentage of the questions asked of reference librarians are likely to be true research questions, as opposed to basic informational queries.

An equally important though perhaps less measurable benefit of the merged service point is that all public services staff are now beginning to see themselves as part of an interdependent, cohesive team. The two-desk model seemed to breed division and distrust between circulation and reference staff. The “us versus them” mentality was compounded to some degree by the fact that the two desks represent a division between professional and paraprofessional staff members; Reference was staffed almost exclusively by librarians and circulation was similarly dominated by

paraprofessionals. Both groups had inaccurate perceptions of the nature of the other group's work, which weren't corrected until they started really working side by side and even sharing some responsibilities. Both Flanagan and Horowitz (2000) and Mozenter (2003) document a similar transformative experience for staff working together, noting that the groups actually enjoyed working together (Flanagan & Horowitz, 2000, p. 334) and felt a greater sense of mutual understanding and integration (Mozenter, 2003, p. 402). For many of us, there is the feeling that "a wall has come down" between these two areas (literally and figuratively). While conflict and friction will never disappear entirely, there is a greater basis of trust and respect now that these two groups share a common team responsibility and essentially back each other up in their various roles.

#### **Other Benefits to the Library**

In addition to the benefits experienced by those staff members directly involved in merging the desks, the library as a whole benefited from this project. In the months after Hurricane Katrina, the library scrambled to adjust to a sudden loss of staff. Because we had already integrated two service desks (circulation and reference) we were better able to absorb a third service point, Multimedia, when it suddenly became necessary to do so. Key staff from that area either did not return or were deployed to other areas of the library so the public services desk took on the added responsibility of checking out CDs, DVDs and equipment to library users. Though most multimedia equipment and a significant portion of the multimedia collection remained on a different floor, we now had the flexibility to leave the desk and could accompany a patron upstairs to the multimedia area if he or she required further assistance. Such a sudden integration of additional responsibilities would have been

much more difficult to achieve if we had not already established the public services staff as a broadly responsible team that can adapt and provide a range of services to patrons. Adding multimedia services helped to expand our one-stop shopping approach and only increased staff members' understanding of library resources.

This merger of the three separate service points into one represents a real cost savings for the library. By reducing the reference librarians' time on the desk from 64 hours a week to only 22 hours, we saved 42 reference librarian hours per week, essentially a full-time professional librarian's time (\$35,000/year). We also saved two paraprofessional positions by eliminating the multimedia department when the two staff members resigned after the hurricane (\$26,000/year per position). Together the reduced librarian and paraprofessional time devoted to staffing desks represents approximately \$87,000 in salary savings. Of course, cost savings will vary at other institutions depending on number of hours saved and the potential for elimination or reassignment of staff.

Another positive effect of the cross-training project was that it provided a model for a new approach to training and deploying student workers. Having seen how much more efficient (from a management standpoint) and gratifying (for the staff themselves) it was to pool the public services staff together, we decided to try the same thing with the student workers who were normally assigned to separate departments or units in public services. In the past these students were trained for a relatively narrow range of tasks within a given unit and their level of productivity depended on the level of activity in that unit. Now, the new broadly trained pool of student workers can be deployed to a variety of units as needed—re-shelving,

working at the circulation desk, or helping patrons with basic questions on how to locate items in the stacks or use the library's printers and copiers. This gives the students a broader range of experience, which is more beneficial to them in terms of work experience and job satisfaction, and it gives us more flexibility in moving them around as needed within public services. Though this might seem like an obvious step to take, the breaking down of boundaries and the letting go of "turf" that took place in the general service point merger paved the way for this to happen, since it also required different units to relinquish some control over "their" student workers.

### **Problems and Concerns Arising from the Merger**

While there were many readily apparent benefits to the integrated service desk, several concerns arose that must be addressed. In some ways, every benefit had an unintended negative consequence. For example, having a single place to ask all questions is obviously more convenient for most patrons, but the flip side of this approach is that patrons in other areas of the library where separate service points were formerly located now have to come to the main desk for assistance. Though the expertise was compartmentalized in our multi-desk approach, it was at least dispersed around the building. We have sought to address this problem by training student workers who are shelving or doing other tasks around the building to be aware of patrons around them who may need help, and to offer assistance in locating materials if needed. We also have a phone set up in the multimedia area with a sign directing patrons to call the public service desk if assistance is required. A staff member is available to come to them in those cases, rather than have the patron make the trip downstairs to get help.

The combined service point, while readily visible to patrons entering the building, is also in a relatively noisy, heavily trafficked area, near the main entrance in the front lobby. Previously, the reference desk had been located in the more quiet and sedate first floor stacks area, accessible through glass doors that separated it from the main lobby. Conducting a reference interview is more of a challenge in this more bustling environment, especially since the reference librarian's place at the desk is directly adjacent to the front doors. We have not arrived at a satisfactory solution to this problem yet, though occasionally the reference librarian will accompany the patron to a workstation away from the main desk if an extended interview is required.

Another concern came mainly from the reference librarians. Some felt that by being on call for so many hours, that they were losing a primary means of contact with patrons, and that their ability to handle general reference questions would diminish as they got less practice in handling a broad range of questions. This concern is echoed by the librarians in Francesca Allegri and Martha Bedard's article (2006), "Lessons Learned from Single Service Point Implementations," in which one librarian comments, "There really isn't a good substitute for spending time on the desk" (p. 46) and another laments, "I feel very out of touch with everyday aspects of the library" and "I think one of the most important things we miss is the appreciation of users" (p. 47). Some of our librarians also felt, along with a loss of expertise, a certain loss of "status" by having to perform some circulation tasks (traditionally non-professional work). Some felt a little embarrassed when teaching faculty remarked on the fact that they were now performing this new role (a task also shared with student workers). We have tried to emphasize that the reference librarian's primary

role and responsibility is to instruct users in the use of resources, and that they are simply there to provide support to the staff members who perform the circulation tasks. Making this distinction between primary and secondary roles probably helps to mitigate the impression that librarians are losing status.

Yet another concern was whether circulation staff would be able to handle reference questions asked of them when a librarian wasn't immediately available. While the reference librarians were trained to perform fairly straightforward mechanical tasks relating to checking out material, the circulation staff was being asked to absorb a more nebulous set of basic research skills and knowledge. It's much easier to determine if you've mastered the basics of a circulation system than to determine if you are capable of directing users to a broad and complex range of research tools. Though circulation staff are not expected to attempt to answer anything beyond the most basic reference questions, it is not always clear that the circulation staffer would recognize that a question is more complex than it sounds, or to know that resources beyond the basic tools are even available. Continued training and an emphasis on the option to refer or follow up with a reference librarian should help to address this issue.

The University of New Orleans library is staffed by three different types of employees—tenured (or tenure-track) faculty, non-classified staff, and state civil service employees. We anticipated that we'd have trouble coordinating three groups of workers who are subject to vastly different employment rules, especially when it came time to rethink job descriptions. However, in the end since each merger participant was freed up to work on other tasks already assigned to them (which

would include research and service required for tenure-seeking librarians), very little adjustment was required in rewriting job descriptions or dealing with tenure regulations. Individuals who had participated were able to note on their annual evaluations that they had voluntarily undertaken cross-training and assisted in other public services areas at peak times. The new duties never interfered with the individual's ability to perform core job functions, but did allow for participation in a wider range of relevant tasks. This seemed satisfactory in our case, but libraries who employ unionized staff or have more stringent university requirements might encounter additional difficulties.

Finally, it should be noted that there was some anxiety about blurred reporting lines and accountability in the new service arrangement. When the desks were separate, there was a clear person "in charge" at each desk. When staff from different areas were combined at a single service point, it was no longer clear who had the final authority. This would be a particular concern during evening and weekend hours when the unit heads and supervisors would typically not be available. After some discussion, it was decided to keep the reporting lines somewhat separate. The reference librarian would be responsible for handling problems that arose with respect to reference issues, and the circulation staff person would have responsibility for that area's traditional domain, which included making policy decisions about enforcing circulation policies and procedures, as well ensuring building security procedures. This has seemed to work so far.

### **Further Changes**

Once we experienced success in merging these major service areas we found that further changes came quickly and easily. One seemingly major change was the complete elimination of the print ready reference collection. When designing the merger it had been decided that the ready reference collection would simply follow the reference staff to the other desk. However, when the collection sat unused in the new space, librarians decided to integrate the materials into the regular reference collection. Before the merger the very idea of eliminating this collection would have caused a minor mutiny. Because the groups were now open to new ways of thinking about service, though, this change happened almost effortlessly.

Another fairly simple but effective change made in the year following the merger has been to add student assistants to the “old reference area.” These student assistants have been trained in how to handle frequent problems such as printing errors, finding books in the catalog, directional questions and referrals. This has helped assuage the fear that librarians would abandon users in need by changing their location.

A more wide-ranging result of this merger is that it has sparked interest in a true marriage of access and reference services. As a part of our larger library reorganization plans, reference and access have been formally combined into one large department with teams composed of both librarians and paraprofessional staff managing service issues together. Time will tell how this new approach will play out. It is certain, though, that our current reorganization efforts are an outgrowth of the success of our merger.

### **Advice**

The authors would like to recommend certain practices, as a result of our successes and failures with this experiment. Our first bit of advice is to take the

process slowly. Take the time to figure out what is best for your situation. We learned through our early attempts not to put too much pressure on ourselves to develop the perfect cross-training program. Staff could not tolerate more than a few hours of training at a time, and although we had high hopes we could never create the perfect training manual. We eventually had to accept that our basic program did not include everything; it was a place to start. Also, spreading training out over time allowed staff to become comfortable with the changes to their workflow and contribute to the process.

Second, we highly recommend that you practice what you preach. In this case, the merger idea was essentially a grassroots movement coming from middle management. Since the supervisors participated in every step of the process they were able to: 1) Model the behaviors they desired in participants; 2) Ensure that all work schedules were fair to all involved; 3) Resolve conflicts as they arose; and 4) Demonstrate their support for the merger by “getting their hands dirty.” In a situation where a merger is dictated from middle or upper management without this direct involvement, the staff might feel disconnected or even alienated from the process. When trying to foster a cooperative environment, it is important to ask others to do only what you are willing to do yourself—even if just in small amounts.

Once you have a training program set up, it is important not to waste the energy you put into it. You might not re-train each member of the staff every year, but it can be relatively easy to continue training once you have a program set up. When staff are offered continuous training they feel included in the process and have the opportunity to contribute to the success of the group. Examples might be: having

brown bag sessions on new databases, asking subject specialists to hold sessions about more advanced research tools, offering advanced customer service/conflict resolution training, etc. Many of these continuous training opportunities can be offered by staff and thus will not stretch your library budget.

Finally, we would like to advise others to gather qualitative data about services before beginning the process. Because we had not conducted surveys about service in previous years we only had anecdotal evidence about perceived quality of service. Although we have data to suggest that our staff found the merger to be a worthwhile endeavor, we would have liked to be able to present more evidence that the end user experienced it as a positive change as well.

### **Conclusion**

A single service point approach can be an effective way to utilize staff and maximize service to users in medium to large academic libraries. Additional benefits include increased respect and cooperation amongst staff, decreased confusion amongst users, and higher user satisfaction.

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Appendix A

**Service Desks Merge Follow-Up Survey**

Please indicate your department: Access Services \_\_\_\_ Reference Services \_\_\_\_

**Circle the appropriate response:**

1. How would you characterize your overall experience of working with a combined Circulation/Reserve/Reference Desk?

Very positive      positive      neutral      negative      very negative

2. In your opinion, how valuable was the merge of service points for library staff?

Very valuable      valuable      neutral      detrimental      very detrimental

3. In your opinion, how valuable was the merge of service points for library users?

Very valuable      valuable      neutral      detrimental      very detrimental

4. How effective was the training you received in preparation for the merge?

Very effective      effective      neutral      ineffective      very ineffective

Comments:

*Thank you!*