

# Memo

**To:** Montana State Library Commission

**From:** Jennie Stapp, State Librarian  
Evan Hammer, Digital Library Administrator

**Date:** May 28, 2021

**Re: Digital first reference services**

Montana State Library (MSL) staff propose a digital first reference service model with in-person references services available by appointment.

## Background

As a special government library, and one in which items from our collection are either mailed to patrons or fully accessible online, MSL leverages a variety of communication tools to provide reference services. Talking Book Library patrons communicate with Readers Advisors primarily by telephone. Other reference services are offered through phone and email and the occasional letter. Less than 1% of reference interactions are in-person through walk-ins. As we reflect on who our users are, and the nature of their information requests, these statistics are not surprising. Citizens look to us for convenient, accurate information that they can access quickly and efficiently. For this reason, we excel at evaluating user needs and designing self-service information access models to meet these needs which often negate the need for in-person interaction and create that convenience users seek.

Currently MSL is not structured well to handle walk-in reference services. Prior to the closure of the reading room in 2017, in-person use of MSL services primarily consisted of use of public access computers. Since 2017 in-person traffic largely consists of people inquiring about the availability of computers or the location of the State of Montana Law Library or the Attorney General's office. Because we lack a true reference desk, prior to the pandemic, on the occasion that a walk-in patron required personal assistance, staff had to bring patrons to their offices or cubicles. There are numerous reasons this setting is problematic for both parties. Given how few patrons require in-person services, it would be inefficient to restructure to accommodate unscheduled walk-ins, especially as we anticipate shifting our workforce towards more telework.

Over the past fourteen months staff have worked remotely and continued to successfully assist patrons with reference needs. Staff have shown that through phone, email, Microsoft Teams, and Zoom, we are able to fully engage with patrons to meet their information needs in timely, responsive ways. Importantly, when focusing users' needs, the quality of service from staff is the same for someone anywhere around Montana as it is in for someone in Helena.

Even as we plan to return to the office, patrons will continue expect to be able to have their information requests addressed through remote technologies. This demand also affords MSL the opportunity to recruit and retain staff who live in Montana communities other than Helena, an expectation we will have to meet in an increasingly competitive job market.

### Proposed changes

On initial consideration a digital first reference services model may seem like a dramatic change but, practically speaking it is very consistent with how we currently operate. That said, with fewer staff physically working from MSL at any one time, to both maintain the security of MSL, and to ensure that patrons who do require in-person interactions have a positive experience, staff recommend an appointment based system for in-person reference services.

Recently TBL staff began to schedule appointments for calls with their patrons. This change was necessary to manage call volume and Readers Advisors' time more efficiently. Knowing when a patron is going to receive a call from a Readers Advisor also creates a more positive experience for our patrons as well.

To effectively execute this model will require staff to plan for and implement a successful appointment setting process that involves a combination of personal and technical support. Additionally, MSL requires dedicated space to accommodate reference interviews to create more positive patron and staff experiences. Finally, staff need to maximize investment in ServiceNow, the State's new customer service platform that provides a knowledge base, a help desk and a customer relations management system.

Most importantly it is incumbent on MSL to communicate effectively to all stakeholders about our continued availability to meet their reference needs.