University of Arkansas Libraries
Public Services Group, May 31, 2012

Present: Molly Boyd (minutes), Donna Daniels, Tess Gibson, Phil, Jones, Kathleen Lehman, Lora Lennertz Jetton (chair), Luti Salisbury, Joshua Youngblood, and Tim Zou.

Desk Tracker
At the last meeting, the Public Services Group discussed inconsistencies with gathering statistics and made two decisions. 1) to cease counting pulling items for patrons from behind the desk as directional contacts but instead count as circulation. When items are pulled in relation to a reference question the transaction will still be counted as a reference transaction. Use Innovative to count as I use in lieu of the directional transactions if patrons do not check out the item. 2) to broaden definitions and field changes to include a fuller description and clarify what is being counted.

Clarifications: If you walk a student to the shelves, when they would have obtained an item themselves without your intervention, count that as a directional transaction. Count the transaction as a “teachable moment” if instruction accompanies and mark as a reference transaction. “Information contact” counts as reference. Count each transaction only once.

We need to devise standardized training for recording statistics that would cross over departments.

Desk Tracker Data Dictionary
Lora generated the list by taking all the tabs from all separate department Desk Trackers. Some tabs are used for all locations; others are specific only to one location.

Activity Tab: “Music Question” is added to PAM Desk Tracker because that number has to be maintained and reported for accreditation. The Reference Department will discuss any clarification needed for the “reference” tab at their next meeting and Donna will report back.

Contact Tab: Discuss what happens when we have multiple media in a single reference question. Special Collections records the media of origin, unless the follow up media involves substantial work and is dominant. If contact is to set up a consultation, only record as a consultation once. The general rules are the first mode of contact is what is recorded. The goal is to count accurately and consistently across the board without double counting.

“Duration of Question”: count only initial transaction, even though follow ups may last for days. This should morph into “consultation” if it is of long duration. It is better to collect the data even if it is not reported at this time, as it may be used as need arises. We will leave this tab as is on estimated times. Special Collections will standardize how time is recorded.

When does it become another transaction? Special Collections records a separate transaction if the researcher poses another question than the original research topic, one that uses another collection. The transaction is counted once if it is an open and ongoing question regardless of the duration, but counted again if the original question was considered terminated, and the same researcher asks another question.

We will ask Lynaire to define the Periodicals: Type of Machine fields.
Satellite location need not be defined.

“Text of question” could be used if a study is being made, based on projects and need.

*Other Tabs*: Used by individual departments or branches, who will define and send to Lora to complete the data dictionary. We can have more tabs in this version of Desk Tracker if we need to move some items to tabs.

“Venue was booked for the preferred time” is meant to track how often classes had to be moved in place or time or because members would not fit in Room 102. This currently only appears on the Reference login. We should record the number of turnaways for the administration because they reflect need and demand. We should also track this number for the group study rooms. We will create a “turnaway” tab after consultation with the Reference Department.

“Classes” tab: Edit documents to line up with Desk Tracker. Add “other” answer for participants. In addition, add “elementary and middle school” and “community” as options. Define “non-mediated instruction” as something that is delivered via Web or video that does not include the presence of a librarian. We record our video tutorials on electronic transactions, along with social media. Interactive tutorial is also counted with electronic transactions. “Non-mediated” should only be used after 2012 after a full discussion and definition and if it is used in lieu of personal contact. May be something that we develop in the future.

Do not double count something that is counted elsewhere.

We will add a box to put “additional instructors” which should be searchable so that individuals can compile their statistics and reports.

Location is ok as defined.

Do not count any classes for which there were no participants (no students showed up=no instruction).

Guest tab: maintain guest ids when they use the computer lab; is purged every two weeks. Should define ID as “government issued ID.”

For the next meeting, Lora will make edits in the dictionary, and the group will edit the documents on reference and instruction statistics.

Announcements: The first and third Wednesdays are reserved for Reference Department meetings, but the second, fourth, and fifth Wednesdays are available for vendor presentations or training.