Call Us: development of a library Telephone Enquiry Service

Liz Burke and Lea Beranek

The authors detail the trial and piloting of a telephone enquiry service (TES) at the Bundoora Campus Library at La Trobe University in order to attempt to resolve the balance between telephone and face-to-face enquiries at the library service desk. They investigated various options throughout 2001 and 2002 and settled on a centralised service model where telephone calls are redirected to a central number. This model was trialled and piloted in 2003 and 2004 before being implemented as a permanent feature of the library's service in 2005.

> With each new technology librarians have been able to expand services. With the invention of the electric light bulb, library hours were extended into the night. The telephone allowed librarians to serve patrons remotely. Over time, these innovations created greater demand for service (Barnello, 1996:8).

ACHIEVING THE RIGHT BALANCE BETWEEN FACE-TO-FACE ENQUIRIES AND TELEPHONE queries at library service desks can be challenging. If this balance is not achieved, there is the potential for time delays, frustrated patrons and stressful situations for staff. Kern (2004:6) quotes a 1958 column in the *Library Journal* by Robert Rolf which expressed concern that 'in-person patrons receive short shrift due to the interruptions of telephone patrons. Telephone patrons also have to wait on hold while in-person patrons are assisted' (Rolf 1958). To minimise occurrence of this situation, with its potential for inferior service, the Bundoora Campus Library at La Trobe University investigated various telephone service models throughout 2001 and 2002 and settled on a centralised service model where telephone calls are redirected to a central number. This model was trialled and piloted in 2003 and 2004 before being implemented as a permanent feature of the library's service in 2005.

The authors describe the experiences of the trial and pilot and what led to the implementation of the permanent service. Issues which emerged are described, including the staffing model for the centralised telephone enquiry service (TES), the training model adopted, and how the service continues, staffed by well-trained casual and continuing staff volunteers from a number of departments within the Library including librarians, library technicians and paraprofessional staff.

Background

The library at the Bundoora campus of La Trobe University serves the academic community at both the Bundoora and City campuses. Table 1 indicates the size of the community served.

Table 1: Community served by the Bundoora campus library, La Trobe University

	Students (persons)	Staff (persons)*
2005	18162	2267
2004	17220	2164
2003	17437	2116
2002	16626	2046
2001	15921	2006

* Staffing figures do not include casual staff.

Library staff at the Bundoora campus of La Trobe University library began investigating possible models for a centralised TES in 2001 by participating in a project organised by CAVAL Collaborative Solutions. A working group was established to explore the issues involved in setting up a Victorian academic libraries call centre to respond to queries about the reciprocal borrowing program. Participants included Deakin University, La Trobe University, the University of Melbourne and Victoria University of Technology.

A trial was conducted in September 2002 to test a number of technical and practical features for improving telephone service to clients through co-operative effort. Rather than a 'call centre' as such, the trial involved 'transferring' calls between the participating institutions. The features tested included technology for switching calls, a roster of operators from the participating libraries and defining and standardising the services available. The trial operated from 10 am to 4 pm five days per week and rotated between the three participating academic libraries on a two-hourly basis. A website composed of links to information on participating library websites such as opening hours, borrowing services, photocopying, and workstation access at the participating libraries was developed.

The trial successfully demonstrated that technology could deliver a more efficient way of dealing with client enquiries. However, it was not an ideal model for responding to queries relating to the reciprocal borrowing program. The experience of participating in this trial nonetheless led the Bundoora campus library at La Trobe University to investigate the feasibility of establishing a centralised TES for the library. The existing service model of six distinct service points meant that staff at each service point would often answer the same question from different patrons. The intention of a telephone service was to answer in a central location those repetitive directional queries such as opening hours and queries about library holdings.

Visits were arranged to a number of Melbourne academic libraries with established centralised telephone services. These included Monash University library at Clayton and Deakin University library at Burwood. The Monash service had been described in an *Australian Library Review* article (Pernat 1994) following a twelve-month pilot. During these visits, library staff discussed their respective telephone services and their experiences in establishing and maintaining such services. Victoria University of Technology library was also contacted to discuss their use of software that provided an automated telephone menu service and allowed patrons to renew books by telephone. La Trobe University library did not pursue the automated telephone software, as the intention of setting up a centralised telephone service was to maintain or improve the level of service currently offered. The options offered by this software were not seen as an improvement in service.

The 2003 trial

Following investigations into possible service models, a proposal was developed to conduct a trial between 10:00am and 3:00pm weekdays in the first three weeks of second semester, 2003. This timing allowed three weeks of planning and preparation during the preceding mid-semester break.

In preparation for the trial, the two busiest service points – the Loans Desk and the Information Desk – conducted surveys of incoming telephone calls. These surveys provided detailed information on the types of queries received by telephone at each service point.

The trial service was located in a separate room in a staff area where a workstation was set up with appropriate equipment and furniture. An additional telephone line was installed and advice sought from the university switchboard on the purchase of an appropriate telephone handset and headset so that operators had their hands free to use the computer workstation.

The four service points participating in the trial were the Loans Desk, Information Desk, Audiovisual Desk (AV) and Serials Desk. The Interlending and Document Delivery Services telephone remained separate from the centralised service, as did the Reserve Desk telephone, as most calls to these services were quite specialised. Each of the four sections contributed a staff member for one hour each day. Reserve staff also contributed to the roster although their service desk was not affected by the trial.

Each section involved in the trial identified a list of queries that would be handled by the telephone operators. For each section there was a list of queries that could be identified as being representative of the types of queries handled within the section.

Guidelines and training

As operators could come from any section of the Client Services area of the library, and could be a librarian, a library technician or a paraprofessional staff member, guidelines were developed and each section prepared appropriate training for questions related to their area. (See Appendix 1: General guidelines for the centralised telephone service). Training sessions were divided into two presentations: Loans/AV and Serials/Reference. These were logical pairings as Loans and AV use the circulation system extensively and Serials and Reference use the catalogue and library web pages

extensively. Separate training sessions were conducted in the use of the telephone handset and headset.

There were 20 operators involved in the trial, in addition to the Reference and Information Services Librarian and the Resource Delivery Services Librarian[1] who co-ordinated the trial. This was a significant number of people to keep informed of developments and plans, so an e-mail distribution list was established to communicate quickly and efficiently.

The guidelines assisted staff of the centralised telephone service in handling calls, including personal calls and calls from those wanting other departments within the university. Much of the information needed by operators was available on the library's website. Training sessions by Reference staff ensured that operators were aware of where to locate information on either the intranet or the public web pages. In addition, an information manual was prepared containing copies of the guidelines, notes from each training session, and a 'cheat sheet' of frequently used numbers.

During the trial, telephone operators were encouraged to remember that they were the first point of contact for the library and needed to present a suitably professional and confident service. It was also important that the TES should offer the same level of service, irrespective of the individual rostered at the time, and their expertise in a specific part of library services.

Evaluation

The telephone operators answered a total of 565 calls during the trial and the survey revealed a relatively even distribution of calls over the week (Figure 1).

Figure 1: Distribution of telephone calls each weekday 2003

A survey form was completed for each call (see Appendix II). During the trial
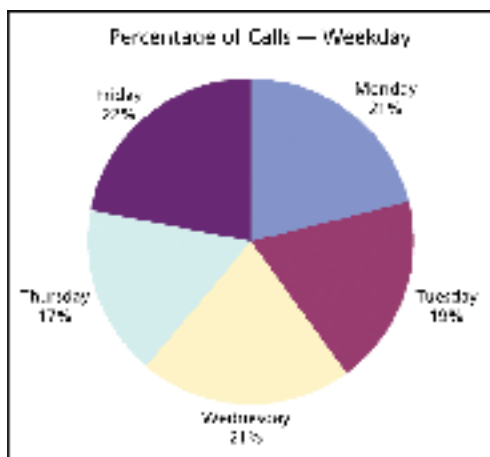
period, each of the four service points also completed a survey form for all calls transferred. This second form allowed examination of the types of queries being referred back to specific service points. Each service point used an individual form. (Appendix III shows the survey form used by the AV Desk.) In effect, two surveys

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1   The Resource Delivery Services Librarian is responsible for a number of teams within the library: Loans, Reserve, AV, Attendants, and Interlending and Document Delivery

were undertaken during the trial – one of the incoming calls and the second survey provided information on the nature of the calls transferred for 'expert' intervention. It was agreed that the data entry would be undertaken by an external contractor using the software package SPSS.

Table 2 shows a breakdown by query type. Miscellaneous calls included requests about library membership, opening hours, campus or library location and other general queries.

Table 2: Types of queries, 2003 trial

Section	% of queries
Loans	40.7
Reference	15.0
AV	6.6
Serials	2.7
Calls to a specific staff member	15.0
Miscellaneous	20.0
Total	**100%**

Feedback sessions were conducted with staff participating as TES operators. Comments included:

- Enjoyed the challenge of something new
- Knowing the queries of other departments and then learning how to answer them was satisfying
- Enjoyed using the technology
- Enjoyed own room, peaceful, was able to get some of own work done
- Found it useful to learn about library web pages and see what others are doing
- I liked being a part of a team with people from other divisions

Feedback was also sought from each section affected by the telephone trial. This indicated overall approval; staff appreciated being able to concentrate on face-to-face encounters with users without the distraction of a ringing telephone.

Although no formal feedback was sought from library patrons regarding the TES, the absence of negative feedback from users on the telephone was taken as an indication that the service was operating satisfactorily from their perspective.

The 2004 pilot

The successful trial in 2003 led to a proposal for a year-long TES during 2004, to incorporate the telephones of the Audiovisual Desk, Information Desk, Loans Desk, and Serials Desk. The telephones for the Reserve and Interlending and Document Delivery Services (ILDDS) service points were not incorporated into the service due to the specialised nature of most of the calls to these service points.

The service commenced at the beginning of 1st Semester, operating from 10:00am to 6:00pm Monday to Friday. This was later amended to 11:00am to 6:00pm to ease

the burden of rostering. The service was suspended during the mid-year break and was concluded at the end of 2nd Semester.

During the 2003 trial, statistics were taken on every in-coming call. For the 2004 pilot, statistics were taken during four sample periods: two weeks into the beginning of each semester and the final week of classes at the end of each semester.

Feedback from operators indicated that the service positively affected work areas due to fewer interruptions, but the majority of staff felt that the drain on staff resources in supporting an additional roster was too heavy. This strain became more obvious when there was already a shortage of staff due to illness, meetings, flexi days etc.

Co-ordinator role

The experience of the 2003 trial led to the appointment of a co-ordinator for the 2004 pilot, responsible for the day-to-day operations of the TES including preparation of the roster. While the Reference & Information Services Librarian and the Resource Delivery Services Librarian were responsible for the overall development, implementation and ongoing management of the service, the need for someone to oversee the day-to-day operations had become evident.

In preparation for the 2004 trial, expressions of interest were sought from library staff from client service areas of the library, who would be prepared to assume the co-ordination of the TES in addition to their regular duties and responsibilities. The duties and responsibilities of the co-ordinator were to:

- Participate in the selection of staff to act as operators for the service

- Prepare and co-ordinate the roster for the TES

- Liaise with the Reference and Information Services Librarian and the Resource Delivery Services Librarian on the delivery of the service, training needs and relevant staffing issues

- Undertake administrative tasks in relation to the service, including maintaining the room and equipment in which the service is located, overseeing the supply of stationary, forms and other requirements, maintaining the procedures and information manuals that support the operators

Evaluation

Table 3 illustrates the number of calls handled by the TES during each of the four sampling periods. The first sampling period of the academic year received the highest number of calls. Over succeeding sampling periods, this number diminished and levelled out toward the end of the academic year. Similarly the total calls for the four sampling periods show that most calls occurred on a Monday with a reduction of approximately 10 per cent on Tuesday and again on Wednesday. Thursday had the lowest total calls and Friday had a similar call rate to Wednesday. It should be noted that this trend is not consistent in the four periods sampled.Only the fourth sampling period is similar, with the first and third sampling periods showing higher levels on Tuesdays and the second sampling period having a markedly lower number of calls on Tuesday.

Table 3: Number of calls per sampling period by weekday, 2004 pilot study

	Sample week	Mon	Tue	Wed	Thu	Fri	Total
1	29 Mar–02 Apr	80	87	73	62	65	367
2	31 May–04 Jun	63	39	43	54	37	236
3	23–27 Aug	37	49	43	42	44	215
4	25–29 Oct	64	48	39	20	51	222
	Total calls	**244**	**223**	**198**	**178**	**197**	**1040**

Table 4 shows that the total calls and the calls for each sampling period, with the exception of the second sampling period, peak in the noon to 3 pm brackets. This distribution appears to be fairly common in relation to demands on other library services, for example, computer workstation demand statistics.

Table 4: Number of calls per sampling period by time of day, 2004 pilot study

Time	29 Mar – 02 Apr	31 May – 04 Jun	23–27 Aug	25–29 Oct	Totals
11:00	48	43	21	23	135
12:00	66	30	38	42	176
13:00	56	32	35	33	156
14:00	55	40	35	36	166
15:00	66	36	29	34	165
16:00	40	30	31	29	130
17:00	36	25	26	25	112
Total	**367**	**236**	**215**	**222**	**1040**

Table 5 shows that, in general, the Information Desk and Loans Desk had the highest number of referrals followed by AV and then ILDDS. Switch (the university switchboard) had a very large number of calls in the first sampling period of the academic year and very few in the subsequent sampling periods, presumably as patrons became more familiar with the university and where and to whom they could direct queries.

Table 5: Number of calls per sampling period by referral point, 2004 pilot study

Service Point	29 Mar – 02 Apr	31 May – 04 Jun	23–27 Aug	25–29 Oct	Totals
AV	22	13	14	8	57
ILDDS	13	8	7	11	39
Info desk	31	18	18	12	79
Loans	33	23	27	22	105
Reserve	1	0	1	9	11
Serials	14	2	6	8	30
Switch	43	0	1	1	45
Other	10	10	5	14	39
Total	**167**	**74**	**79**	**85**	**405**

Feedback sessions were again conducted with staff who acted as operators. Some of their comments included:

- The call centre relieves some of the pressure at service points – less stressful – fewer interruptions – most days can achieve more work.
- Can concentrate on the person who is in front of us (at the service desk) instead of being distracted by the phone ringing.
- The desk is less hectic and [the TES] has made desk work more manageable.
- Staff who volunteer for the TES gain more knowledge about the library system, library policy, and find it interesting work.
- If the TES was discontinued it would mean a huge step backwards in terms of service.

Staff wanted the service to continue, however, most felt that certain issues would need to be addressed including:

- A dedicated room as there was too much noise in the present location due to the proximity of a photocopier and staff coming and going.
- Additional casual hours were needed to contribute to the roster.
- A more up-to-date computer with faster response time.
- An updated mobile telephone headset.
- Consistent training for all staff who work on the TES and more 'hands on' training.

Operational service from 2005

Following the success of the 2004 pilot, it was decided to implement the TES as a permanent feature of the library's service model, using a combination of continuing and casual staff. The casual staff who worked at the TES also worked regular shifts at the Loans Desk, ensuring they had a good grasp of library policies and procedures which assisted them in answering telephone enquiries.

Training

After evaluating the training sessions conducted by the team leaders of each service area (Loans, AV, Serials, and Reference) in 2004, and after the introduction of the co-ordinator role, it was decided to streamline the training process by giving this responsibility to the co-ordinator. The Guidelines for operators were also reviewed and updated (see Appendix 1).

Evaluation

Table 6 shows call levels throughout the year are relatively constant. The highest total was 898 in March. It should be noted that the data for November does not refer to a full month as the survey ended on 18 November. The low total shown for July is due to the three-week semester break. Similarly, the highest number of calls referred was in March (340 calls). No apparent trends are evident in the data collected to date. We are interested to note that telephone operators were able, on average, to deal with over 68 per cent of calls.

Table 6: Summary of 2005 calls

Month	Calls referred	Calls dealt with by TES	Total calls taken
March	340	558	898
April	241	560	801
May	289	583	872
June	233	611	844
July	67	137	204
August	265	545	810
September	247	584	831
October	268	537	805
November	135	411	546
December			
Total	**2085**	**4526**	**6611**

By mid-2005, the need for a deputy to assist the co-ordinator was clear. Expressions of interest were sought from client services staff to assume this role in addition to their regular responsibilities for 2nd semester 2005. This role, and that of the co-ordinator, were continued in 2006.

In preparation for the 2006 service, expressions of interest were sought from staff interested in assuming the roles of co-ordinator and deputy co-ordinator for the TES.

The establishing of these important roles has ensured the smooth operation of the service. By 2006 the co-ordinator had fully assumed responsibility for training operators and offering refresher sessions to continuing operators. It has been found that offering the roles of co-ordinator and deputy co-ordinator for the TES is also an important staff development opportunity, providing experience in co-ordinating staff from various areas of the library and negotiating their availability, preparing rosters and dealing with situations where rostered staff are unexpectedly absent, liaising with the two managers responsible for the overall operation of the service and maintaining statistics to provide data for a report at the conclusion of each semester.

Conclusion

The service operates with a mixture of continuing and casual staff. Operators have been trained to answer a range of general, straightforward enquiries. Issues requiring specialist assistance are referred back to the appropriate service point. Given that operators may come from any section within the library and may be a librarian, library technician or a paraprofessional staff member, guidelines have been produced so that patrons receive the same level of service via the TES, regardless of the individual to whom they speak.

The implementation of the TES at the Bundoora campus library was motivated by the desire to improve service to clients as well as developing a more flexible client service model for the library. It was a very deliberate decision to staff the TES with both librarians and paraprofessional staff. The majority of operators are sourced from those Sections which benefit most directly from the TES, namely Loans and

Reference and Information Services. However the opportunity to act as operators is offered to all library staff in all sections.

It has been suggested in the professional literature that the development of library call-centres 'is part of a disturbing trend towards deskilling of the library profession' (Dilevko 2001: 222). He cites Harris' definition of 'deskilling': 'the delegation of routine activities to less qualified personnel, leaving the complex and difficult problems to the trained professional' (Harris 1992: 223). The establishment at La Trobe University Bundoora campus library of a TES rather than a call-centre, the use of all staff as potential operators, and the implementation of firm guidelines on the types of queries which it is appropriate to answer and those which should be referred to service points, works to address the fear that those acting as operators are somehow less skilled than their colleagues and therefore less valued.

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Appendix I: guidelines for the TES at La Trobe University library

La Trobe University Library

General Guidelines for the centralised telephone service

The service operates during teaching weeks in 1st and 2nd semester Monday to Friday, from 11:00am – 6:00pm.

The service points involved and their telephone numbers are:

- Information Desk   2922
- Loans   2937

Some general guidelines:

1. The first person rostered at 11 am must phone the service points to ensure that the telephones are diverted.

2. The changeover for each shift is on the hour but you are expected to report 5 minutes before your starting time so that any messages, concerns, ongoing issues can be passed on.

3. The recommended way to answer the telephone, or something similar, is: 'La Trobe University library, may I help you?'

   - Each phone call should not last more than 2–3 minutes, if the call is any longer, you should transfer the call to the appropriate service desk.

   - For each call that you receive, you need to note it on the statistics sheet.

4. There is a diary for you to record any problems that you encounter.

Appendix II: Evaluation of calls to the TES

La Trobe University Library
Telephone Service Trial 2003 — Evaluation Questionnaire

1. When? (circle)   Day of the week: Mon   Tue   Wed   Thu   Fri

2. Time of day:

1	2	3	4	5
10:00am–11:00am	11:00am–12:00pm	12:00pm–1:00pm	1:00pm–2:00pm	2:00pm–3:00pm

3. Types of questions (circle):

   3.1 AudioVisual Queries

Information about AV bookings	6
'Do you hold this video?'	7
'How do I find the audio lectures online?'	8
'Do you set up equipment in classrooms?' (Transfer to COMET)	9
Complex query – transferred to AV Desk	10

   3.2 Loans Queries

Renewals	11
Deleting PIN's	12
Placing a hold	13
'How many items do I have on Loan?'	14
'When are my items due back?'	15
'What fines have I accrued?'	16
Cancellation of a hold or booking	17
Complex query – transferred to Loans Desk	18

   3.3 Reference Queries

Catalogue checking for holdings	19
Catalogue checking for bibliographic information	20
Complex query – transferred to Information Desk	21

   3.4 Serials Queries

'Do you hold this journal?'	22
Information about borrowing serials	23
Information about renewing serial loans	24
Information about holds on serials	25
Information about storage requests	26
Complex query – transferred to Serials Desk	27

   3.5 General

Opening hours	28
Membership of the library	29
Transferring to a specific library staff member	30
Transferring to another department	31
Location of the Library on campus	32
Location of the University campus	33

3.6 Other
Other (please specify)   34

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10 July 2003

Appendix III: evaluation of transferred calls from the TES

La Trobe University Library

Telephone Service Trial 2003

AudioVisual Desk — Evaluation Questionnaire

This survey form will chart the types of calls handled by the AudioVisual Desk during the centralised telephone service, ie. Monday 21 July to Friday 8 August from 10:00am to 3:00pm.

This is a survey of queries, not of people so if a caller has more than one query, you will need to fill out a form for each of those queries.

1. When? (circle)   Day of the week: Mon   Tue   Wed   Thu   Fri

2. Time of day:

1	2	3	4	5
10:00am–11:00am	11:00am–12:00pm	12:00pm–1:00pm	1:00pm–2:00pm	2:00pm–3:00pm

3.   Types of questions:
Queries regarding off-air recordings   6
Requests for off-air recordings   7
Queries regarding AV Reserve   8
Queries regarding AV online   9
AV interlibrary loan and intercampus loans queries   10
Complex AV reference queries   11
Bookings for academic staff   12
Bookings for Equity and Access Room   13
AV ordering queries   14
AV collection development queries   15
Queries regarding AV borrowing rights   16
Personal calls   17
Other (please specify)   18

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18 July 2003