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Note for bottom of page: **Luke Vilelle** is Public Services Librarian, Wyndham Robertson Library, Hollins University, Roanoke, Virginia. Vilelle was the Outreach Librarian at the Virginia Tech Libraries from August 2004 to August 2007. **Christopher C. Peters** is Stacks Manager, the University Libraries of Virginia Tech, Blacksburg, Virginia. Submitted for review February 28, 2007; accepted for publication April 10, 2007. This manuscript is an expanded version of a poster session given at the 2006 American Library Association Annual Conference on June 24, 2006, in New Orleans.

Don't Shelve the Questions: Defining Good Customer Service for Shelvers

<abstract>Many library customers' questions never reach designated service points such as circulation and reference desks. These questions may be addressed to personnel untrained in customer service such as student shelving staff in an academic library. This article presents data from a 2005 study investigating where and when shelvers received questions (and what types of questions they received) in Newman Library at Virginia Tech. Results showed that these students primarily received directional and item location questions. Follow-up workshops helped shelvers improve their ability to accurately refer questions when needed, and to increase their accompaniment rate when answering customers' queries.**</abstract>**

<h1>Introduction</h1>

For most of their existence, libraries have offered reference and information desks to answer their customers' questions. For probably just as long, customers have had questions that did not reach these designated service points – either the customers never asked their questions, or they asked someone who was not a designated reference provider. As libraries consolidated service points, more spaces in the library became barren of designated spots for asking questions.

Newman Library at Virginia Tech, like many research-sized libraries, has floors with no

apparent place to ask for help. In the absence of service points, have customers found somebody else to ask?

In an effort to account for all questions asked in the library, the Newman Library shelving unit began asking its student workers in October 2003 to count each question they received. This count has shown that student shelvers, who received no customer service training, answered more than 1,500 questions in both the 2004-05 and 2005-06 academic years.

The authors of this study believed they needed to respond to this large number of questions. Before a response could be fashioned, though, the investigators needed to discover the details about the questions being asked. The investigators explored the types of questions asked of shelvers, and when and where those questions are asked. They also attempted to measure the effectiveness of shelvers in answering questions. Results of initial studies prompted the investigators to hold customer service workshops for students. Another round of data gathering followed, to examine if the workshops had any effect.

<h1>Background</h1>

The University Libraries of Virginia Tech serve a population of approximately 22,000 undergraduate students, 6,000 graduate students, 3,000 faculty, and 3,500 staff members, and are open to local and state residents. The library system includes one main building, Newman Library, three smaller branch libraries and a remote high density storage building with a total collection exceeding two million volumes.

The main campus library, Newman, consists of five public stacks floors spread over 200,000 square feet. Only two of the five floors, floors one and four, offer service points. The first floor includes a reference/help desk in the building lobby and a desk for circulation/reserve functions. An additional reference/help desk is located on the fourth floor, close to an entrance

from an adjacent building. Both reference desks are staffed during all operating hours of the building – 7:30 a.m. to midnight Monday-Thursday, 7:30 a.m. to 8 p.m. Friday, 9 a.m. to 8 p.m. Saturday, and noon to midnight Sunday. Reference staff on the first floor can only accompany library customers to other parts of the building if two staff members are on the desk; the fourth floor reference staff person must remain at the desk. A photocopy service desk is also located on the fourth floor, although its primary function is to assist with customer copy needs. As indicated in table 1, floors two, three, and five offer no service points, but house significant parts of the Newman collection.

The Shelving Unit of Newman Library consists of three full-time employees and thirty-five to fifty-five part-time student employees, depending on the academic semester. The three full-time workers, long-term employees familiar with the collection and policies of the library, have received multiple customer-service training opportunities in prior years, so the investigators focused their study on student employees. Student shelvees include both undergraduate and graduate students, and both domestic and international students. Operating hours vary for the Shelving Unit, but usually run from 8 a.m. to 9 p.m. Monday through Thursday, 8 a.m. to 5 p.m. Friday, and noon to 9 p.m. Sunday.

Unrelated to the investigators' study, the Virginia Tech Libraries began compiling data on the number of questions shelvees receive in October 2003 in an attempt to make sure that all questions asked in the library are counted. Shelvees place a tick mark on their shelving slips for each question received. The student shelvee supervisor compiles and reports the totals monthly.

During the first full academic year of data collection, 2004-05, the shelvees recorded 2,172 questions. In 2005-06, shelvees recorded 1,522 questions. The investigators believed these numbers to be significant amounts.

<h1>Literature Review</h1>

For as long as students have worked in academic libraries, publications have offered advice on how to train them. A 1995 issue of the *Journal of Library Administration*, titled *Libraries and Student Assistants: Critical Links*, focused exclusively on the topic, and Black's introduction to the issue included this assessment: "Student workers are commonly the first individuals seen by the user and their interactions frequently form the basis for patron opinion of the library."¹

White's 1985 article provides an historical overview of the expanding role of the part-time student employee in the library. Increasingly, students have not only shelved and checked out books, but have also provided information services. White finds the beginning of this trend in the 1970s, a "decade of increased reliance upon student assistants for more responsible and demanding job performances."²

Of particular interest to this research was the University of New Hampshire's 1973 initiative to place reference aides in the stacks to provide assistance both in locating specific materials and in referring questions to appropriate service points.³ Chosen from undergraduates already working in the library, the students worked two-hour periods during hours of heaviest library use. The reference aids, with identifying badges, roamed the stacks and approached people to ask if they needed help. Over a period of ten weeks, the aids contacted 4,436 people and answered 2,411 questions. Although the students recorded questions in one of three categories – direction (questions that required a simple locational answer), referred (those inquiries that required the help of the reference librarian), and search (simple reference questions that student aids could answer after a short search) – Tebbetts and Pritchard did not indicate the most frequent types of questions.

When the topic was student shelvees, authors focused on how to ensure the students are shelving materials properly. However, shelvees are also among the most visible library workers. Spending most of their time in public stacks in the library, shelvees are convenient and easily approachable for customers who have questions.

Swope and Katzer conducted a study at Syracuse University's Carnegie Library in 1973 that explored whether library users had questions, and if they did, whether they would ask a librarian. Of 119 randomly selected users, forty-nine had questions, but only seventeen of those would ask a librarian. Most important to this research, "of the thirty-two 'non-askers,' twenty-three indicated that they would ask a fellow student for aid."⁴ Gregory echoes the idea that students may be more comfortable asking questions of their peers. His 1995 article suggests that peer-to-peer interaction often facilitates communication, meaning student employees are frequently the library's best hope for educating fellow students on use of the library.⁵

In addition, library customers often do not understand the various employee roles in the library. Crowley and Gilreath reported that focus groups conducted to better understand LibQUAL+ findings at Texas A&M revealed a lack of customer understanding of the various employee roles in the library. "Patrons expect a broad range of help and do not understand the detailed structure and roles of library staff, and resort to guessing where they should go."⁶ The focus groups also singled out student workers, and shelvees in particular, as providing poor answers in response to questions. This qualitative study did not explore the numbers of questions student shelvees received.

The investigators found no research that formally addressed the number and type of questions shelvees received, though some articles indicated an interest in this information.

Reilly and Browning conducted an informal survey of stacks personnel at Oregon State in the mid-1990s, asking each staff member, “How many times during each hour would you estimate that you are asked questions by library patrons?”⁷ The average response was 2-3 questions per hour, and the anecdotal response indicated the most frequently asked type of question dealt with locating specific library materials. Based on this survey, Oregon State instituted additional training for stacks personnel stressing customer service and point-of-use assistance.⁸

Loughborough University in England, which made student shelvees wear large badges saying, “Welcome, can I help you?”, recorded the number of questions asked during the first four weeks of a term. The shelvees received 366 queries, of which 347 were directional questions.⁹ The authors could not say whether this was a larger number of questions than in previous years, but shelvees felt anecdotally that they had answered more questions.

The Warren-Newport Public Library District in Illinois expects shelvees to respond to customer questions.¹⁰ This library, which has a budget of \$4.7 million and holds 232,000 items, tallies the number of questions answered by shelvees, and found that it “is in the hundreds each month.”¹¹ The article did not reveal the types of questions asked.

<h1>Methodology</h1>

This study aimed to discover the types of questions, and to explore how well the shelvees handled those questions. The investigators designed a data slip, similar in size to the shelving slips that the shelvees used every day, that provided space for a shelver to record the question received, date/time, location, answer/referral, and sources consulted (see Appendix 1).

To ensure anonymity, the shelvees did not identify themselves on the slips. The investigators also had the shelvees sign a consent form before participating in the study. The

investigators gained the approval of the Institutional Review Board (IRB) on campus before proceeding with the study.

The investigators knew from the question totals from previous months that, on average, the shelving staff received two hundred to three hundred questions a month. Assuming a shelving staff of about forty, that meant each shelver was receiving five to eight questions a month. Asking shelvers to record each of those questions seemed to be a reasonable request, and indeed, the shelvers' supervisor heard no complaints from shelvers about filling out the slips.

One drawback to this data collection method is that the data is dependent on the thoroughness of shelvers in recording the transactions. Because the data is incomplete, no analysis could be done on percentage of correct/incorrect answers, though some answers could be identified as incorrect. Instead, the data gave insight into such issues as the types of questions, where shelvers received the questions, whether shelvers accompanied customers to their destination, what types of questions shelvers referred, and to whom they referred questions.

The first data collection period was March and April 2005. Upon the completion of these two months, the investigators coded the questions. Because the investigators wanted to make finer distinctions than the traditional directional/reference split, the following coding structure was used.

Directional: Question that could be answered with a map or signage.

Location: Question that requires knowledge of the LC classification structure to answer.

Policy: Question that requires knowledge of library rules, regulations or procedures to answer.

Reference: Question that requires the use of one or more information sources to answer.

The directional/location distinction was made so as to ensure differentiation between questions such as “Where are the bathrooms?” (directional) and “Can you help me find this book?” (location).

The investigators repeated the study in October 2005. After analyzing the combined data, the investigators identified areas of possible improvement. Working with the shelving staff supervisor, the investigators designed a one-hour customer service workshop to address issues identified in the data. Following the workshops, the investigators repeated the data collection for one more month, from March 21 to April 21, 2006. They analyzed this data and compared it to the previous months to see if service improved.

Findings From First Two Survey Periods

The student shelvees in Newman Library filled out the question data forms for each question asked in March and April of 2005, and again in October 2005. The findings below represent a compilation of this data.

The investigators first explored two basic questions: where and when did the shelvees receive questions? Not surprisingly, the shelvees received the most questions on the third floor (see table 2). The third floor, which has no service points, holds 40.8 percent of the volumes in Newman. Not only are more students likely to come to this floor to retrieve books, but more shelvees are likely present on the floor because of the number of books.

The fourth floor, home of 25 percent of the Newman collection, also received a large number of questions. The fourth floor has a photocopy center and an information desk, but the information desk is located down a hallway and away from the collections. The remoteness of the information desk, and the presence of the current periodicals section on this floor, are likely contributors to the number of questions on the fourth floor.

The time of questions generally reflected the same pattern seen at the library service points. The peak hours for questions are in the mid-afternoon, just as they are at the reference desk (see table 3). The most likely time for an information desk to receive a question, 3-5 p.m., is also the most likely time for a shelver to receive a question.

The investigators next explored the types of questions. If the only questions the shelvers received dealt with the location of the bathrooms, or how to find a call number, then the library could expect these questions to be answered correctly. The shelver training includes a tour of the library, and shelvers must be able to read Library of Congress call numbers to do their jobs.

Directional and location questions constituted a clear majority of the questions asked of shelvers. From the combined data of the spring and fall 2005 surveys, directional questions constituted 35 percent of all questions, and location questions accounted for 47 percent (see table 4).

From the literature review, which indicated a frequent lack of understanding of what types of questions should be directed to which library employees, the investigators had concern that shelvers would be receiving large numbers of reference questions. However, this did not prove true. Only 9 percent of the questions asked of shelvers were reference questions. A study conducted in Newman Library in spring 2005 showed that 38.9 percent of all questions asked at Newman Library service desks (including all information, circulation and photocopy desks) are reference questions.

The final 9.3 percent of questions asked of shelvers were policy questions.

How are shelvers responding to these questions? Assessments of effectiveness in answering questions, drawn from reference service literature, generally fall into one of two categories. The first category is a quantitative measurement of correctness, based on whether the

answer matches what has been predetermined to be an acceptable answer. The second category is a qualitative measurement, which attaches a personal judgment – usually, some indicator of customer satisfaction – to the result.¹²

For this study, no quantitative measurement of accuracy could be taken, because the investigators did not have complete information on questions and answers. In a few cases, the investigators could identify clearly wrong answers (to be addressed in later training) but no comprehensive quantitative analysis of correctness could be done.

The second method of evaluating effectiveness depends on a wealth of factors external to the actual question and answer, such as approachability and other behavioral aspects. Radford investigated the importance of the relational dimension (as opposed to the content dimension) in the reference transaction in academic libraries, and found that students valued the relational aspects higher than the content aspects in their perceptions of a reference transaction.¹³

The Reference and Adult Services Division (now the Reference and User Services Association) of ALA recognized the importance of these factors with the publication of the first Behavioral Guidelines for Reference and Information Services in 1996, writing that “the positive or negative behavior of the librarian (as observed by the patron) becomes a significant factor in perceived success or failure.”¹⁴ Several studies over the previous two decades have explored the importance of interpersonal skills and service orientation to the success of the reference transaction.¹⁵

The study’s methodology precluded an in-depth assessment of the shelvers’ behavioral performance. Nobody observed the shelvers as they responded to questions, and nobody asked the customers for their level of satisfaction with the transaction.

However, the investigators could easily extrapolate from the question/answer slip whether the shelver accompanied the customer in retrieving the desired information. Murfin wrote in 1997 that accompaniment is one of the three behaviors shown by research to be associated with success of outcome.¹⁶

Of the 302 non-policy questions (policy questions were excluded from this analysis, because accompaniment is generally not needed to answer a question such as, “how many books can I check out?”), shelvers went with the customer in answering 144 of the questions (48 percent).

The investigators also developed a second proxy method to assess the effectiveness of shelver responses. Because the investigators expected that the shelvers would receive questions they did not know the answer to, the investigators wanted to assess the effectiveness of the shelvers’ referrals. Are shelvers referring customers when appropriate, and are those referrals to the proper desk?

Directing customers to a desk that cannot help them sours them on their library experience. As seen at Texas A&M, “a strong sentiment coming from the focus groups was for users to be able to ask any library staff member in a public service environment a basic question and receive at least an accurate referral to the service point where the question could be answered.”¹⁷ The investigators found that the shelvers lacked the knowledge to make accurate referrals. Of forty-two shelver referrals, twenty-five went to circulation, nine to reference, and eight to a variety of other locations (including interlibrary loan, special collections, and such jumbled references as “circulation desk or reference desk – one of the librarians on the first floor”).

Many of the referrals to circulation were for questions that would be more appropriately handled at the reference desk. Other circulation referrals came on questions for which the

circulation desk could do nothing more than point a user to a Web form (for example, if a book could not be found after searching the stacks and the reshelving room, the customer will need to fill out a “Request a search for a missing item” form. However, shelvers often referred customers to circulation, which could not do anything more for them). Overall, the investigators believed the number of referrals to circulation was too high, and the number of referrals to reference too low.

<h1>Discussions/Expectations</h1>

After reviewing the results of the two initial surveys of questions, the investigators decided that improved performance and a greater degree of consistency in the student employees’ customer service was desirable. The investigators decided to hold workshops to provide student employees with the information and tools to handle customer questions in an appropriate and consistent manner.

Prior to the workshops, expectations of student involvement with library customers needed to be defined. The investigators and shelving staff supervisor discussed student employee priorities. Even though the first priority of student shelvers is maintenance of the stacks, a secondary customer service role is explicit in their positions. In other words, shelvers could continue to use their iPods and headphones, but they would be expected to make eye contact with customers approaching them and not to avoid possible questioners. To express these sentiments, the investigators and shelving staff supervisor developed the following guidelines.

General guidelines for working with library customers:

- Allow the customer to make the first contact. We do not expect shelving staff to routinely ask customers if they need assistance.
- Be polite. Be concise.

- If you do not know the answer, refer them to an appropriate service point (i.e. Circulation, Reference desk, Photocopy center).

For specific types of questions:

- For customers asking directional questions (i.e. bathroom, classroom, elevator) please provide directions or, if appropriate, walk them to the desired destination.
- For customers looking for a general section of the library (i.e. BF call numbers, magazines, newspapers), please accompany them to the desired destination.
- For customers seeking policy information, check the back of your shelving slip. We will begin printing some general policy information on the back of the slip. For all other policy questions, refer the customer to circulation.
- For customers looking for a specific call number, please accompany the customer to the exact location and help them retrieve the desired item.
- For customers looking for a general subject area (i.e. biology, chemistry, engineering), please refer them to either the Reference desk on the first or fourth floor.
- For customers having difficulty finding a specific book or journal, and you have checked the shelf and confirmed it is not there, you might consider using Addison (the library catalog) to check to see where the book or journal should be located. If you do not feel comfortable using Addison, it is perfectly appropriate to refer the question to either the Reference Desk on the first or fourth floor.

<h1>Workshops (including outcomes of follow-up study)</h1>

Following the agreement upon student expectations, the investigators arranged the workshops.

Because the shelving unit employed approximately thirty-five student assistants at the time,

multiple sections would be needed. Not only would a common time be impossible to find, but the investigators also wanted to keep the groups smaller so that all attendees could participate in the discussion.

Of the thirty-five students, twenty-nine attended one of four one-hour workshops, scheduled in the afternoon on a Tuesday and Wednesday in March 2006, about four months after the initial study concluded. Information regarding workshops was distributed to student employees a week prior to the sessions. The workshops were mandatory, but could be in lieu of or in addition to regularly scheduled hours. The investigators served refreshments.

The workshops began with a request to the attendees to write down questions that they had recently received that could be classified in one of the three following categories: (1) most common questions received, (2) weird or unusual questions received, and (3) questions to which the shelver did not know the answer. Each shelver shared their questions during the ensuing group discussion. During this period, the workshop leaders corrected many shelver misconceptions about library services and resources.

The second part of the workshop focused on unit expectations, library policies, and the functions of the various library service points. This part of the workshop included role playing exercises. The workshop leaders first provided humorous examples of how NOT to respond to questions (including such poor behaviors as appearing uninterested in the question and pointing customers to another section without accompanying them), then had the shelvers model better customer service behaviors.

The final part of the workshop focused on the use of Addison, the library catalog. The investigators wanted to give the shelvers the ability, if they so desired, to handle a basic title search in Addison for a book or journal. Anecdotal evidence, including previous catalog usability

studies in which shelvees participated, indicated that shelvee knowledge of Addison was extremely limited. Thus, the final fifteen minutes included a brief demonstration of the catalog, an Addison handout, and role-playing exercises requiring Addison searches.

From the written evaluations, three particular aspects of the workshop stood out in the shelvees' minds. When asked "What, if anything, did you learn from this workshop," ten shelvees' responses included Addison searches (example: "I learned more about how Addison works on the Web site."), nine included online service request forms (example: "I learned more about where the forms were for searches, etc. And the turnover time for searches."), and seven identified service desk responsibilities (example: "Primarily, I learned the different roles of the reference desk and circulation desk. I didn't realize that each served different purposes.").

The follow-up study, which took place the month after the workshops, showed positive gains, particularly in the two areas the investigators had identified as measures of effectiveness in answering questions. The accompaniment levels increased, as shelvees seemed to make a greater effort to ensure the customers could find the books they needed. In the two studies prior to the workshops, shelvees accompanied the customer 144 out of 302 times (47.7 percent). In the study immediately following the workshops, shelvees accompanied the customer fifty-seven out of ninety-three times, a 61.3 percent accompaniment rate (see figure 1).

Referrals also improved, not surprising given the comments on the workshop evaluation forms. The investigators achieved their goal of increasing reference referrals and decreasing circulation referrals. As shown in table 5, shelvee referrals to reference increased from 21 percent of all referrals (nine of forty-two) before the workshops to 67 percent (eight of twelve) following. Referrals to circulation dropped from 60 percent of all referrals (twenty-five of forty-two) to 25 percent (three of twelve).

<h1>Further Opportunities for Research</h1>

The investigators recognize that their study methodology had limitations. The study's data is based entirely on self-reporting by shelvers, with no feedback from the customers whom the shelvers assisted. The study focused mostly on assessing the types, locations, and times of questions asked of shelvers, so that shelvers could be better equipped to answer those questions. Much research could still be done in analyzing the effectiveness of shelver responses.

One instrument for probing the effectiveness of reference transactions, the Wisconsin-Ohio Reference Evaluation Program (WOREP), has both the reference provider and customer fill out a survey evaluating the reference transaction.¹⁸ Miller, at the University of Pittsburgh, also had both the reference provider and the customer evaluate the transaction.¹⁹ These types of obtrusive studies have proven valuable in identifying the factors that have a significant impact on the success of a reference transaction (Novotny and Rimland showed how one library improved its reference success rates through the use of WOREP) and could be adapted for use in evaluating a question/answer transaction between a shelver and a customer.²⁰

An unobtrusive study alternative could be the use of "mystery shoppers," researchers designated to ask particular questions. This is a common type of study for assessing the percentage of correct answers given by reference providers, as the questions and correct answers are predetermined and library staff members are unaware they are being evaluated. Hernon and McClure used this approach in their landmark study that established the 55 percent rule of reference accuracy.²¹ Durrance used a similar unobtrusive technique, although without the predetermined questions and answers, in her studies of customers' willingness to return to the same reference provider.²²

Yet another approach could probe the mindset of the student workers. How much value do they place on the customer service portion of their job? Such measurements could provide an indication of how likely they are to help customers.

<h1>Conclusions</h1>

Monitoring the number and types of questions shelvers receive – just as libraries have always done at the reference desks – is a valuable tool in maintaining a strong customer service focus in the library.

Student shelvers in Newman Library at Virginia Tech receive a significant number of questions. Most of those questions simply require knowledge of the library building and/or the workings of Library of Congress call numbers. However, shelvers should not overestimate the capabilities of the customers, and should always at least offer to accompany them to their desired destination (be it a book or a study room). In addition, shelvers receive questions that require higher-level reference skills. In this study, the percentage of these questions was low, but shelvers had trouble answering them. Giving shelvers the knowledge to make correct referrals helped them handle these questions better.

Regardless of the type of question received, shelvers should recognize that responding to customers and their questions is an important part of their job. Because questions will be asked of any library employee who spends time in a public space, libraries should not neglect customer service training for those whose primary duties may not require interaction with the public.

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