Access & Engagement Unit, Academic Year 2024-25

Overview:
The Access & Engagement Unit encompasses Access Services and Reference Services. Within each of these areas, supporting our patrons and forming connections with them is crucial. In Access Services in the Main Library and Gary Strong Curriculum Center (GSCC), we seek to "connect [in-person and virtual U of I affiliate and community members] to library resources," course reserves, spaces, and technology.[1] In Reference Services, we seek to "assist, advise, and instruct [in-person and virtual U of I affiliates and community members]" in finding, accessing, and evaluating information related to their information and research needs.[2] The work of this unit occurs synchronously and asynchronously.

Library KPIs:
- Primary Responsibility
  - Building Usage
  - Course Reserves
  - Research and Reference Assistance
- Relevant
  - Online Catalog
  - Physical Circulation
  - Student Savings

Fall 2024
- Fall 2024 Metrics: AccessEngagementUnit-Metrics_2024-Fall.xlsx
- Fall 2024 List of Reference Model Options: 2024 Reference Model Options.docx

Spring 2025
- Spring 2025 Metrics: AccessEngagementUnit-Metrics_2025-Spring.xlsx

Continuing metrics
- Longitudinal Reference Metrics: ReferenceMetrics_Longitudinal.xlsx
- Binder Project Tracking: Binder Project Tracking.xlsx
- Mending Tracking: Mending Tracking.xlsx
- Main Library Space Count: Space Count Fall 2024 & SPRING 2025.xlsx
- Main Library Access Services Desk Count: UI MAIN LIBRARY FRONT DESK TALLY 2024-2025.xlsx

AY 2025 – 2026 Objectives Document: Access-and-Engagement_ObjectivesKPIs_AY25-26.docx

Objectives (includes timebound goals and projects):

Facilitate physical and electronic Course Reserves
- **Why:**
  - Save students money and increase access to required and recommended course materials
- **How:**
  - Support faculty and instructors in their use of Course Reserves

- o Ensure that website information is kept up-to-date
- o Collaborate with the Open Strategies Team to advertise Course Reserves services
- o Seek feedback from the campus community
- **Success looks like:**
  - o Continued or increased usage of Course Reserves by faculty and instructors
  - o Positive interactions with faculty and instructors
  - o Continued cost-savings for students
- **Fall update (8/19/2024 - 12/31/2024)**
  - o 89 instructors (excluding those teaching ENGL 101/102 and MATH 170/175/275) across 103 courses and 40 subjects utilized Course Reserves for required and/or recommended readings in fall 2024. These courses served approximately 6,969 enrolled students and in total, physical course reserves circulated 107 times, Controlled Digital Lending items were viewed 4,646 times, and four additional ebook licenses were purchased based on turnaway notifications. We estimate that Course Reserves saved enrolled students over $474,000 on the purchase of required and recommended physical items across all courses utilizing this service. Cost-savings by discipline ranged from $718.40 across all Biological Engineering courses to $83,109.90 across all English courses, with the average cost-savings by discipline equaling $11,871.56. These data are affected by the number of courses utilizing course reserves, within each discipline, and the number of students enrolled in these courses. Estimated cost-savings of items on Course Reserves, by all discipline is available in Sheet 2 of the Fall 2024 metrics spreadsheet. This is the first year that we've gathered data on all courses using Course Reserves, instead of just courses who utilize this service for required readings. As such, a comparison between fall 2024 and AY 2023 – 2024 data is not feasible. However, current usage of Course Reserves by instructors as well as the number of circulations and views of items on Course Reserves appears to indicate that the Library is filling a need on campus. Data gathered for future reports will allow us to more clearly identify if usage continues or increases over time.
- **Spring update (1/1/2025 - 5/9/2025)**
  - o 76 instructors (excluding those teaching ENGL 101/102 and MATH 170/175/275) across 91 courses and 41 subjects utilized Course Reserves for required and/or recommended readings in spring 2025; these courses served approximately 5,396 enrolled students.
  - o In total, physical course reserves circulated 253 times, Controlled Digital Lending items were viewed 3,653 times, and two additional ebook licenses were purchased based on turnaway notifications.
  - o We estimate that Course Reserves saved enrolled students over $417,000 on the purchase of required and recommended physical items across all courses utilizing this service.
  - o Cost-savings by discipline were the largest for History courses and smallest for Curriculum & Instruction courses. These data are affected by the number of courses utilizing Course Reserves, the number of items on reserve for each course, and the number of students enrolled in these courses.

- The estimated cost-savings of items on Course Reserves, across all disciplines, are available in Sheet 2 of the Spring 2025 metrics spreadsheet.
- Current usage of Course Reserves by instructors as well as the number of circulations and views of items on Course Reserves appears to indicate that the Library is filling a need on campus.
- **Final outcomes**
  - Over the last year, Course Reserves were utilized by instructors across more than 40 subjects. Physical items were checked out 360 times and Controlled Digital Lending items were viewed more than 8,200 times. These data appear to indicate that the Library is filling a need on campus.
  - The cost-savings metric we use for physical items demonstrates that Course Reserves saves students across campus a combined total of more than $400,000 per semester. Savings appear to be largest for students enrolled in English and History courses and smallest for students enrolled in Biological Engineering and Curriculum & Instruction courses. However, these cost-savings data are not perfect and vary based on the number of courses utilizing Course Reserves, the number of items on reserve for each course, the number of students enrolled in these courses, and the accuracy of the average book cost used.
- **Challenges and opportunities for next year**
  - Moving forward, it would be useful to investigate whether other cost-saving metrics could provide a more accurate picture of the impact of Course Reserves on student costs. Right now, we are using an average book cost to determine cost-savings, but in the future, it could be worth exploring whether we could use actual book costs (as shared on the bookstore's website or Amazon) for each course to determine cost-savings. This would require much more time on the part of staff to gather these data and calculate the cost-savings, but it might lead to more accurate data.
  - There might also be an opportunity to partner more closely with liaisons, who can contact faculty of courses with high enrollment prior to the semester and offer to purchase required texts for Course Reserves.
  - One ongoing challenge is gathering qualitative feedback from instructors and students on Course Reserves. Starting in Fall 2025, the Library will conduct focus group with students across campus and we hope that these conversations will result in data that can inform our services.

Review and maintain physical collection stacks
- **Why:**
  - Save patron time
  - Increase usability of physical collection stacks
  - Reduce patron confusion
- **How:**
  - Shelve returned and new items in a timely manner
  - Conduct ongoing review of physical collection stacks for accuracy, damage, cleanliness, and order
- **Sucess looks like:**

- o Reduction in un-loaned items labelled as missing
- o Orderly and accurate physical collection stacks
- **Fall update (8/19/2024 - 12/31/2024)**
  - o Main Library Access Services continued their review of physical collection stacks, reviewing the A-G call number ranges. During their review, they identified more than 500 missing/lost items, 20 mis-shelved items, 8 items with call number issues, and 134 items not in Alma. Throughout the course of the semester, they pulled 296 items for mending and 602 duplicate items for review by subject librarians. They also identified 686 un-loaned items as missing. This time-consuming collection maintenance work ensures that patrons are able to find what they need when they visit our stacks. In Fall 2024, the Gary Strong Curriculum Center (GSCC) added 696 items to their collection and removed/deleted 819 items. Again, this work ensures that our collections are usable and relevant for our patrons.
- **Spring update (1/1/2025 - 5/9/2025)**
  - o Main Library Access Services continued their review of physical collection stacks, reviewing the E-F call number ranges.
    - During their review, they identified more than 1,200 missing/lost items, 19 mis-shelved items, 28 items with call number issues, and 53 items not in Alma.
    - Throughout the course of the semester, they pulled 878 items for mending and mended 332 items
    - 665 duplicate items or multiple editions were also pulled for review by subject librarians.
  - o The Gary Strong Curriculum Center (GSCC) added 1,214 items to their collection and removed/deleted 333 items.
- **Final outcomes**
  - o Reviewing and maintaining the Main Library's and GSCC's physical stacks is a time-consuming, but beneficial task that ensures that our collections are usable and accessible for our patrons.
  - o The comparison between Alma and the Main Library's physical stacks has resulted in the identification of more than 1,700 missing/lost items, 39 mis-shelved items, 36 items with call number issues, and 187 items not in Alma.
  - o Over the course of the year, more than 600 items were mended, and more than 1,200 duplicates/multiple editions were pulled for review by subject librarians.
  - o This was also a busy year for the GSCC, with the addition of more than 1,900 new items. This year's curriculum adoption was English Language Arts.
- **Challenges and opportunities for next year**
  - o The project workflow for comparing Alma and the Main Library's physical stacks will shift slightly based on discussions between the Access Services Manager, Unit Head for Access & Engagement, and the Associate Dean of Operations & Access once the fourth floor is complete.
    - Continue the comparison between Alma and the stacks
      - Identifying mis-shelved items, missing items, etc.
    - Reduce mending criteria

- Only pull those items that are falling apart, moldy, or needing a new label
  - Reach out to liaisons once to ask about duplicates/multiple editions
    - Ask if they want a list to review for any of their call number areas, or if they want to keep/remove all duplicates and older editions, keeping the most recent

Provide relevant and timely point-of-need Reference and Circulation services
- **Why:**
  - Ensure that Access & Engagement service points reflect the current needs of patrons
- **How:**
  - Track and analyze point-of-need service point interactions
  - Track and analyze data on hold requests
  - Seek feedback from the campus community
- **Success looks like:**
  - Positive interactions with patrons
  - Monitoring usage of point-of-need Reference and Circulation services and making recommendations based on data
  - Completing IDOC resident students' 'Requests For More Sources' within one week of receipt
  - Filling hold requests for physical items (held by U of I Library) in timely manner
- **Fall update (8/19/2024 - 12/31/2024)**
  - Reference, Main Library Access Services, and GSCC employees staffed their service points at various hours throughout the semester. In Fall 2024, Reference received 1,691 questions (a 2.2% increase when compared to Fall 2023) and the GSCC received 380 questions (a 55% increase when compared to Fall 2023). In Fall 2024, 68% of reference questions were classified as READ level 2 or higher, while only 54% were classified similarly in Fall 2023. Main Library Access Services continued to utilize LibAnswers to track questions and began a basic desk count in late October, reporting more than 2,000 interactions with patrons. These data are currently being used to inform schedules and service models, with both Reference and the GSCC considering changes to their hours in future semesters. In fall 2024, the Reference Coordinator, Access Services Manager, and Unit Head also began discussing cross-training Access Services students on known-item reference assistance. So far, we've surveyed students about their knowledge and experience answering reference questions and met to discuss our goals for training. An initial training is planned for February 2025 and will include Main Library and GSCC Access Services student employees, with the goal of holding smaller/shorter check-in trainings in the future. Four IDOC requests were received in fall 2024, with librarians completing these requests within 2.5 days, on average, and the entire request being completed within 9 days. ~~Hold requests for physical items were filled at a consistently fast rate, with the time between request submission and placement on the hold shelf averaging 30.9 hours, or 1.2 days (this data is available~~

> ~~in Alma Analytics/Shared Folders/University of Idaho/Reports/Access and Engagement/AverageTime-HoldsProcessed).~~

- **Spring update (1/1/2025 - 5/9/2025)**
  - Reference received 1,074 questions (a 21% decrease when compared to Spring 2024).
    - 68% of reference questions were classified as READ level 2 or higher, while only 63% were classified similarly in Spring 2024.
    - When looking at questions by format and READ Level, 89.6% of IM questions were rated as READ Level 2 or above, compared to 52.8% of in-person questions.
      - In Spring 2024, 81.9% of IM questions were rated as READ Level 2 or above, compared to 48% of in-person questions.
  - The GSCC received 278 questions (a 17% increase when compared to Spring 2024).
  - Main Library Access Services continued to utilize LibAnswers and a basic desk count to track questions, reporting more than 3,601 interactions with patrons.
  - The Reference Coordinator provided a cross-training session for Access Services students on known-item reference assistance. Unfortunately, only a small number of students were able to attend.
  - Reference support of IDOC requests for more sources ended in Spring 2025 as the Idaho Department of Correction was able to participate in the JSTOR Access in Prison Initiative.

- **Final outcomes**
  - In AY 2024 – 2025, reference received 2,765 questions, an 8.5% decrease when compared to AY 2023 – 2024.
    - READ Level 2 questions and higher increased by 7.9% in AY 2024 – 2025 when compared to the previous academic year.
    - Most questions in AY 2024 – 2025 came from U of I affiliates (89%) and more than half of all questions were asked in-person (57.6%). These statistics are on par with what was reported in AY 2023 – 2024.
    - When looking at questions by format and READ Level, 91.7% of IM questions were rated as READ Level 2 or above, compared to 53.7% of in-person questions. In comparison, in AY 2023 – 2024, 73.7% of IM questions were rated as READ Level 2 or above, compared to 44.9% of in-person questions
  - The GSCC received 658 questions, a 39% increase in questions when compared to AY 2023 – 2024.
    - A plurality of questions in AY 2024 – 2025 were related to book requests (24.3%), most questions came from students (65.3%), and almost all questions were asked in-person (93%).

- **Challenges and opportunities for next year**
  - Errors in the Alma Analytics report created to track timing for fulfilling hold requests and the inability to separate out Summit requests meant that the data associated with this metric were inaccurate in Fall 2024 and could not be reported in Spring 2025. Looking ahead, more time will need to be spent within Analytics to see if this

data can be generated. If not, it will be necessary to identity other metrics to track the rate of filling hold requests for physical items (held by U of I Library).
- o Starting in Fall 2025, we plan to schedule shorter, check-in trainings with Access Services students throughout the semester.

Provide timely access to the Main Library and Gary Strong Curriculum Center (GSCC)
- **Why:**
    - o Ensure that Main Library and GSCC building hours reflect the current needs of patrons
- **How:**
    - o Gather and analyze gate count data
    - o Analyze space usage gathered by other Units/Teams
    - o Seek feedback from the campus community
- **Success looks like:**
    - o Continued or increased usage of the Main Library and GSCC during open hours
- **Fall update (8/19/2024 - 12/31/2024)**
    - o Between August 2024 and December 2024, the Main Library gate count reported more than 122,527 visitors, a 7% decrease when compared to Fall 2023. However, these numbers are lower than expected as the gate counter malfunctioned and stopped counting at various times throughout the semester. Even with these issues, data do indicate an 11% increase in footfalls in October 2024 when compared to October 2023. The GSCC also had consistently high usage with a total of 924 visitors, with 365 footfalls in September 2024 alone. Space tracking undertaken by Main Library Access Services also indicates consistently high usage of the Library's open and reservable spaces. Data collection last year was inconsistent so a comparison is not feasible, but data from Fall 2024 indicate that first-floor open spaces averaged more than 4,000 users per month, with October being the busiest month. The open and reservable group study rooms on the first, third, and fourth floors averaged 105 users per month, while the reservable individual study rooms averaged 34 users per month. Although a few study carrels were used frequently, overall, these spaces showed limited use, with occupants identified as using these spaces only approximately 7 times per month, on average.
- **Spring update (1/1/2025 - 5/9/2025)**
    - o Between January 2025 and May 2025, the Main Library gate count reported approximately 129,316 visitors, a 22% increase in footfalls when compared to Spring 2024.
        - ▪ The open spaces on the first floor were the most used area in the Main Library and the first-floor reservable group study rooms had the most usage, on average, when compared to other reservable and open study rooms.
        - ▪ Usage of the Data Hub space increased 85% between Fall 2024 and Spring 2025.
    - o Space tracking undertaken by Main Library Access Services also indicates consistently high usage of the Library's open and reservable spaces.

- Data indicate that first-floor open spaces averaged more than 3,400 users per month, with February being the busiest month.
- The open and reservable group study rooms on the first, third, and fourth floors averaged 82 users per month, while the reservable individual study rooms averaged 27 users per month.
- Space tracking identified users in all 12 study carrels at least once during the semester. Overall, these spaces showed limited use when compared to the two reservable individual study rooms, with occupants identified as using these spaces approximately 4 times per month, on average.
- The GSCC reported fewer visitors in Spring 2025 (670 visitors) than in Fall 2024, with January and April being their busiest months.

- **Final outcomes**
  - In AY 2024 – 2025, the Main Library gate count reported approximately 251,843 visitors, a 3% decrease when compared to AY 2023 – 2024. We did experience gate counter malfunctions in Fall 2024 and consider this decrease minor.
  - Space tracking undertaken by Main Library Access services indicates that the open spaces on the first floor were the most used area in the Main Library.
    - The first-floor reservable group study rooms had the most usage, on average, when compared to other reservable and open study rooms.
    - Usage of the Data Hub space increased approximately 84% between Fall 2024 and Spring 2025.
    - On average, carrel usage was low when compared to the usage of the two reservable individual study rooms.
  - The GSCC's tracking sheet indicates 1,594 visitors during AY 2024 – 2025, with a total of 12 class visits.

- **Challenges and opportunities for next year**
  - After collecting space tracking data for an entire academic year and being more diligent in confirming that the gate counter is functional, we can begin the process of examining the Main Library's open hours to determine if they still meet the needs of our campus community as well as considering whether we need more student employees at specific times of time of the day. We might also be able to leverage the upcoming focus groups to gauge the times when students use or want to use the Library.
    - Based on the space tracking data, we also have the information necessary to justify transitioning additional carrells to reservable individual study rooms.
  - Across the Main Library and GSCC, we can potentially use gate count and space tracking data to inform when we want to host Library events.
  - Consistency in completing space tracking in the Main Library improved in Spring 2025, but gaps in data collection remain. As we move into the next academic year, we will need to ensure that student employees remain diligent in this work and that gaps are minimized.

Timebound: Investigate new reference model options

- **Why:**
  - Ensure that the reference model used meet the needs of patrons based on point-of-need interaction data
- **How:**
  - Review reference models at other academic libraries
  - Review point-of-need reference interactions
  - Discuss model options with Reference group and Library leadership
- **Success looks like:**
  - By the end of the year, develop a list of reference model options, with pros and cons for each option, and a recommendation for AY 2025 – 2026
- **Fall update (8/19/2024 - 12/31/2024)**
  - Reference librarians generated a list of three reference models with pros and cons for each option. These were shared with the Dean of Libraries and Associate Dean of Operations and Access.
- **Spring update (1/1/2025 - 5/9/2025)**
  - Following additional conversations with the Dean of Libraries and Associate Dean of Operations and Access as well as meetings with the Reference group, Reference Services will pursue a pilot project for AY 2025 – 2026.
    - This will include moving the Reference Desk to the second floor, having two librarians staff a larger portion of open hours, and inviting colleagues outside Access & Engagement to staff the desk.
- **Final outcomes**
  - Reference Services spent the year exploring the philosophical and practical implications of changes to our reference model.
  - We believe that shifting to a model where two librarians staff a larger portion of open hours, rather than equally dividing hours amongst the Reference group, ensures that we maintain a high level of service, while also ensuring that librarians have sufficient time to step away from the desk and engage in other aspects of their jobs.
- **Challenges and opportunities for next year**
  - Moving to a new location on the second floor could create space for more in-depth reference questions and allow for greater opportunities to collaborate with the Writing Center and Tutoring Services.
  - There are concerns about whether patrons referred from the Circulation Desk to the Reference Desk will follow through. There are also concerns about whether returning patrons will notice our empty space at the first-floor desk, miss the new directional signage, and assume that the Reference Desk is closed, rather than located elsewhere.

Unit/Team Metrics:
- Objective 1: Facilitate physical and electronic Course Reserves
  - # of courses using course reserves
  - # of faculty/instructors using Course Reserves
  - # of students enrolled in courses using Course Reserves

- o # of times course reserves items circulated
- o # of times course reserves items were viewed (Controlled Digital Lending items)
- o # of additional ebook licenses for Course Reserves items requested and purchased during the semester (based on turnaway notifications)
- o Estimated cost-savings of items on Course Reserves, by course discipline and semester
- o Feedback from campus community
- Objective 2: Review and maintain physical collection stacks
  - o Call number ranges reviewed
  - o # of physical items pulled for mending
  - o # of duplicates and older editions pulled for review by subject librarians
  - o # of physical items not in Alma
  - o # of physical items with call number issues
  - o # of physical items mis-shelved
  - o # of physical items labelled missing
  - o # of physical items labelled lost
  - o # of new and returned items
  - o # of shelving assignments completed
  - o # of un-loaned items labelled as missing
  - o # of items added to the GSCC collection
  - o # of physical items deleted/removed from the GSCC collection
  - o Data from other projects involving physical items
- Objective 3: Provide relevant and timely point-of-need Reference and Circulation services
  - o # of service point interactions by location, READ level, mode, etc.
  - o # of IDOC requests received and completed, by timeframe
  - o # of hold requests for physical items held by the U of I Library
  - o Average time between request submission and placement on hold shelf
  - o Feedback from campus community
- Objective 4: Provide timely access to the Main Library and Gary Strong Curriculum Center (GSCC)
  - o Gate counts by month
  - o Reservable space bookings by month
  - o Feedback from campus community
- Objective 5: Timebound: Investigate new reference model options
  - o List of reference model options, with pros and cons for each option, and a recommendation for AY 2025 – 2026

Membership:
- Jylisa Kenyon (lead)
- Suzie Davis
- Aarika Dobbins (through 1/2/2025)
- Hanwen Dong
- Haley Hunter
- Victoria Kerr
- Pam Martin
- Alisa Melior
- Kelly Omodt

- Diane Prorak
- Tyler Rodrigues
- Rochelle Smith
- Lex Van Horn (as of 3/24/2025)

Reporting to:
- Jylisa Kenyon (Unit Head)
- Rami Attebury (Associate Dean, Operations & Access)

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[1] Warren, B., Armstrong, D., Boucher, A., Harper, J., Pierard, C., Thoulag, J., & Ketchum, D. (2020). *A framework for access services librarianship: An initiative sponsored by the association of college and research libraries' access services interest group* [Report]. Association of College and Research Libraries. https://alair.ala.org/handle/11213/17206

[2] Huling, N., Dallas, L. J., Kinder, R., Whitlatch, J. B., & Woodard, B. (2017, September 17). *Professional competencies for reference and user services librarians*. Reference & User Services Association (RUSA). https://www.ala.org/rusa/resources/guidelines/professional