

Using Springshare's LibCal to Move Librarians off the Reference Desk

Karen Munro

ABSTRACT

In 2022, a task group at the University of Victoria Libraries moved reference service off the desk and into an appointments model. We used Springshare's LibCal to create a public web calendar and booking system, with librarians setting office hours and appointments done over Zoom, phone, or in person. LibCal allows us to send feedback follow-up requests to appointments and to keep stats and assess usage. This article is a practical case study in implementing a service model change, with emphasis on how we adapted LibCal to support the service to serve librarians and students.

ORIGINS

The University of Victoria (UVic) is a public research library in Victoria, BC, Canada. It enrolls about 21,000 students annually, who are served by about 33 librarians. Until spring 2022, University of Victoria librarians staffed a reference desk from Monday to Friday, 10 a.m. to 4 p.m. The reference desk took a just-in-case approach to research help questions, providing librarian expertise for 30 hours per week to answer drop-in questions—there was no requirement for users to book an appointment in advance to use the service. Staffing the reference desk was considered a core librarian duty, one that had been part of librarian work as long as the library had existed.

However, statistics showed that traffic at the desk had been declining for decades, as it has done at most academic libraries worldwide. From fall 2014 until spring 2015 (the earliest available dates on our digital platform), 6,093 questions were asked at the desk. The following year that number dropped to 5,382, and the next year to 4,699. That trend continued until 2020, when COVID closed library buildings and walk-ins dropped to zero. When buildings reopened, the numbers didn't rebound. From fall 2021 to spring 2022, only 152 questions were asked at the reference desk.

But even as the reference desk was losing traffic, individual consultations with librarians—by email, phone, or office visit—were going strong. From fall 2014 until spring 2015, we recorded 2,873 individual consultations with librarians. Between fall 2019 and spring 2020, that increased to 4,808. In 2020, COVID increased individual consultations to 6,410. That number fell slightly after buildings reopened, but it still far outpaced the traffic at the reference desk.

Clearly, there was still a demand for the valuable research help that librarians provide—but the drop-in, just-in-case model of the reference desk was no longer working. And while the desk was getting quieter, librarians were being asked to build skills in new areas such as data management, open scholarship, and grants and awards support. With librarian time and expertise so vital in so many areas, it no longer made sense to schedule them on the reference desk on a just-in-case basis for a decreasing number of drop-in visits.

About the Author

Karen Munro (kemunro@uvic.ca) is Associate University Librarian, Engagement and Learning, University of Victoria. © 2025.

Submitted: 20 November 2024. Accepted for Publication: 14 May 2025. Published: 15 September 2025.

This article outlines the work of a 2022 task group charged with moving UVic Libraries' research help services away from the just-in-case reference desk model, and into a just-in-time appointments model. We used Springshare's LibCal app to create a public web calendar and booking system, with librarians setting office hours during which they're available. In the new model, appointments are offered over Zoom or in person. LibCal also allows the library to send feedback and assessment requests to users, to keep automatic stats, and to more easily see usage trends.

This article is a practical case study in implementing a change to a service model, with emphasis on how our library adapted LibCal to support the service, and on how individual librarians configured LibCal and Zoom to serve their needs. End users, such as managers, reference librarians, and any staff or librarians involved in Springshare support, may find it a useful precedent or complement to their own work.

LITERATURE REVIEW

The American Library Association's Office for Research and Statistics has documented the long-term decline in library research help statistics—a drop of almost 50% from 1994 to 2008 across all reporting libraries.¹ Laura Rose Taylor shows how this trend continues to play out in academic libraries, summarizing the Association of College and Research Libraries' (ACRL) survey of 1,533 academic libraries which shows that “[t]he average number of transactions and the average number of consultations [has] continued to decline.”²

In this context, the traditional reference desk model has been the topic of much study. Dennis B. Miles writes that, “[m]any librarians have complained that reference service from the desk is an inefficient method in providing service to patrons and needs to be drastically changed or eliminated.”³ However, he also notes that the reference desk is still widely used and championed, even as it is studied and critiqued.

Many studies examine the challenges of the reference desk model. Jodi Jameson, Gerald Natal, and John Napp's survey of over 200 students found that while the students experienced some barriers to using the reference desk—such as not knowing how to identify librarians, having library anxiety, and not understanding the services that librarians offer—overall they felt able to ask librarians for help.⁴ Bøyum, Byström, and Pharo observed patrons' questions at the Oslo Metropolitan University and found that most interactions at academic library reference desks could be categorized as directional, technological, and known-item, rather than reference.⁵ Dennis B. Miles also notes a preponderance of non-reference transactions as a critique of the reference desk model to be found in the literature, setting it in the context of “the rise of the Internet as a tool to find information, [meaning] patrons no longer needed to go to the library to find information.”⁶ Miles's own survey of librarians who have been moved off the reference desk finds that a top reason for this move is “not enough questions that require a librarian's expertise.”⁷ Jason Coleman, Melissa N. Mallon, and Leo Lo provide a concise summary of challenges to the reference desk model, including patrons' greater reliance on remote service, the need for librarians to focus more on individual consultations and group instruction, and budget and staffing pressures.⁸

Christina E. Holm and Sarah Kantor consulted librarian-recorded service data to understand users' preferred reference service models, finding that patrons “respond positively to staffed and visible reference desks as well as to 24/7 chat services” and that “[w]hen librarians are removed from the reference desk and replaced with an on-call model (or if the reference desk is eliminated

completely), face-to-face reference transactions decrease overall.”⁹ However, their study considered removal of librarians from the reference desk as part of an overall reduction in research help, rather than a shift in mode without a net loss in service hours. Hazel McClure and Patricia Bravender studied 1,567 questions asked at Grand Valley State University over seven semesters when librarians visibly staffed the reference desk and when they were on call but not visible, finding “the average number of reference questions answered by on-call librarians was the same as the number answered when the reference desk was staffed.”¹⁰

The literature reflects how changes in technology and post-pandemic research habits have led many libraries to explore and adopt research help consultations either in addition to or instead of the reference desk model. Jackie Stapleton, Caitlin Carter, and Laura Bredahl reviewed 43 studies on changes to library research consultations between 2013 and 2020. Fifteen of these studies reported on platforms for web conferencing, scheduling, or note taking, and six specifically addressed using LibCal for scheduling.¹¹ Of particular relevance to this article, Gregory Nelson provided an early review of LibCal’s features, including calendars, widgets, and forms.¹² Ngoc-Yen Tran provided a subsequent account of implementing Springshare’s Appointments Scheduler feature for research help consultations at San Jose State University, highlighting its ease of use, integration with other Springshare tools, and strength in providing service data.¹³ In her summary of ACRL’s 2021 survey of academic libraries’ reference services, Laura Rose Taylor notes that “the portion of these delivered as virtual reference services continued to rise,” and that while in 2019 only 16% of research help consultations were provided remotely, by 2021 54% of consultations were remote.¹⁴

In her review of a decade of library literature on the changing role of reference librarians, Anna Marie Johnson maintains that the reference desk “still looms large in the psyche of reference librarians” and that staffing a reference desk holds enduring symbolism despite “statistics that no longer support this model and the resulting call in the literature that it is time to let it go.”¹⁵

VISION

At UVic Libraries, the Library and Research Help Model Task Group (LRHMTG) was formed in March 2022 and was charged with rolling out a new model for librarian research help. Library administration provided the following vision:

In the new service model, library help will be provided by staff at frontline service points (desk, chat, email) during regularly scheduled service hours, while research help will be provided by librarians via appointment. This is a shift away from just-in-time or drop-in research help service.

The task group was charged with implementing this plan before the start of classes in September 2022.

Because the reference desk had been traditionally considered a core duty for librarians, this change constituted a major cultural shift. Fortunately, UVic Libraries had recently developed guiding principles for research help. These principles were co-created with librarians, through a consultative process that explicitly articulated some of our shared assumptions about how and why librarians do research help.

The guiding principles include commitments to continual learning and service improvement, visible and accessible service delivery, and experimentation, creativity, and risk-taking in

providing research help. They helped to frame the internal conversation about this change, as well as all of the logistical discussions that follow, below. They are publicly available on the UVic Libraries website at <https://www.uvic.ca/library/about-us/policies/index.php#ipn-library-use-guidelines-policies>.

SERVICE CONTEXT

At UVic, only MLIS-holding librarians provide research help, meaning help with tasks such as developing research strategies, locating and assessing information, and understanding citation styles. Non-librarian staff can provide other types of library help, such as help with tasks such as printing, retrieving reserves, and looking up known items. Non-librarian staff are trained to refer all research help questions to librarians.

The triage model used at UVic is based on the article “A New Classification for Reference Statistics” by Debra G. Warner, which divides user questions into four tiers of increasing complexity.¹⁶ In the UVic library context, questions at the Warner 1–2 level can be answered by non-librarian desk staff, while questions at the Warner 3–4 level must be referred to librarians. The new research help appointments model and the technological system used to support it needed to integrate with the Warner triage model, allowing non-librarian staff to continue to answer questions at the 1–2 level, and to refer questions at the 3–4 level to librarians.

To accomplish this, the task group created a framework for most research help questions. The framework categorized questions into one of two categories: either the researcher needs simpler help right away (e.g., a student needs last-minute help finding sources when an assignment is due) or the researcher needs specialized, in-depth help but can wait for it (e.g., a faculty member needs a consultation on advanced research.) The new model needed to accommodate both of these priorities—urgency and expertise.

SOFTWARE

UVic Libraries already used several Springshare apps, including LibCal and LibAnswers. LibCal is a calendaring, booking, and event management tool that we used primarily for event and workshop management. However, some librarians had voluntarily adopted it for appointment booking and were sharing their booking links publicly. Anecdotally, LibCal was also the tool used by most academic libraries for booking appointments, both locally and in the literature.

Given these facts, the task group didn’t seriously consider using any other platform. Instead, we focused on deciding how LibCal should be configured and integrated with other tools, including LibAnswers and Outlook.

LibAnswers is Springshare’s email ticketing system, which we use to receive and track emailed reference questions. The library was already using LibAnswers to provide general reference help via a common email address, askus@uvic.ca. Emails were triaged by staff using the Warner system. Because LibCal and LibAnswers are both Springshare products, librarians could access both with a single username and password, and assessment data could be viewed easily across both tools. While LibAnswers wasn’t part of the appointments model, it was another service mode for research help and it was helpful to have both modes integrated into a single provider and interface.

Librarians also needed to integrate LibCal with their personal work calendars, in order to avoid double-booking or missing appointments. UVic Libraries uses Outlook email and calendaring, and

the handful of librarians who had already adopted LibCal appointments had successfully integrated LibCal and Outlook. The integration allowed LibCal to check their availability in Outlook and show them as available for appointments during any free times in their Outlook calendar, without the need to maintain two calendars.

CONFIGURING LIBCAL APPOINTMENTS

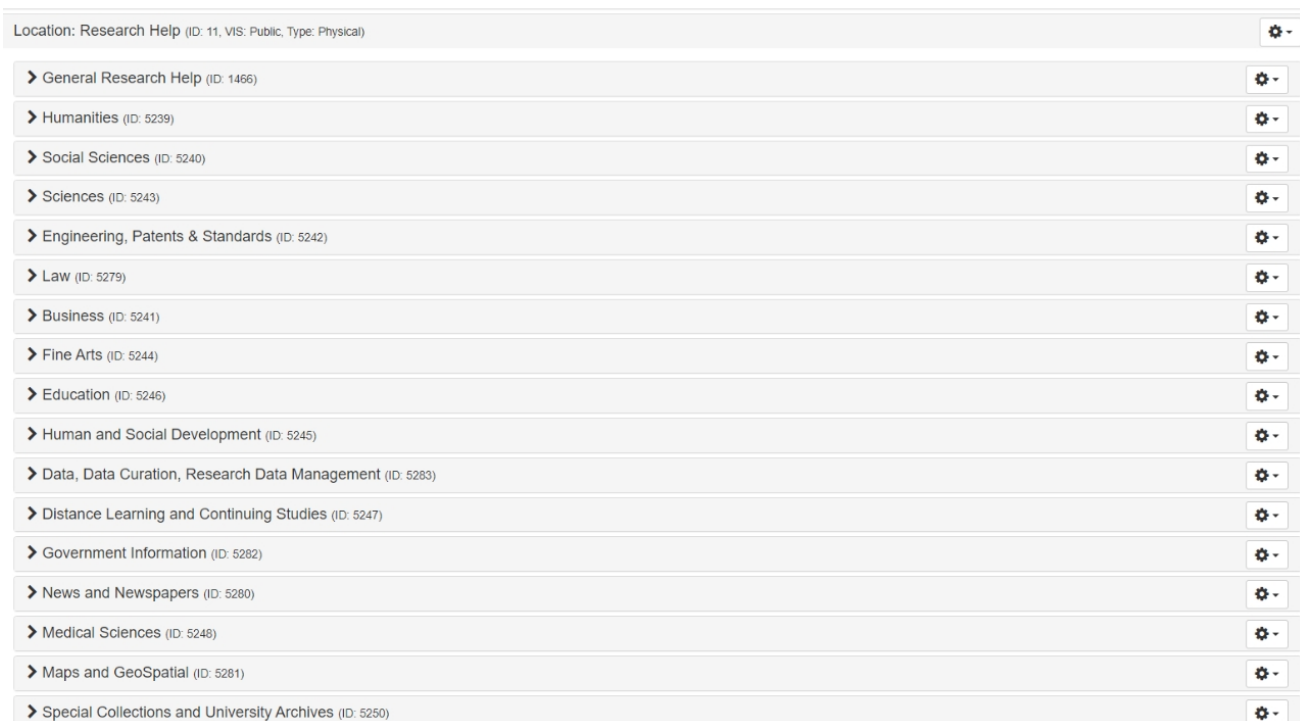
Although LibCal was already in use by a few librarians, the task group needed to roll it out to the full group of reference librarians. All reference librarians needed to have accounts and their accounts needed to be configured consistently. Librarians needed training and documentation to manage and maintain their accounts.

On the admin side, LibCal allows appointments to be structured through locations, groups, or individual accounts. Our configuration of these options needed to accommodate both urgent questions and questions requiring more expertise. The configuration also needed to respect the setup of the handful of librarians using LibCal already.

The task group reviewed the public configurations of LibCal at multiple academic libraries and took the following approach (see fig. 1):

- A single location was created, called Research Help. This resided at the same level as the existing librarian accounts.
- Multiple groups were created within Research Help. One was called General Research Help. This group included all librarians providing non-specialized, non-disciplinary research help.
- Other groups in the Research Help location were named for the university's faculties and departments, and for areas of expertise such as data management and government information.

Figure 1. LibCal's Research Help location, showing multiple groups within it.

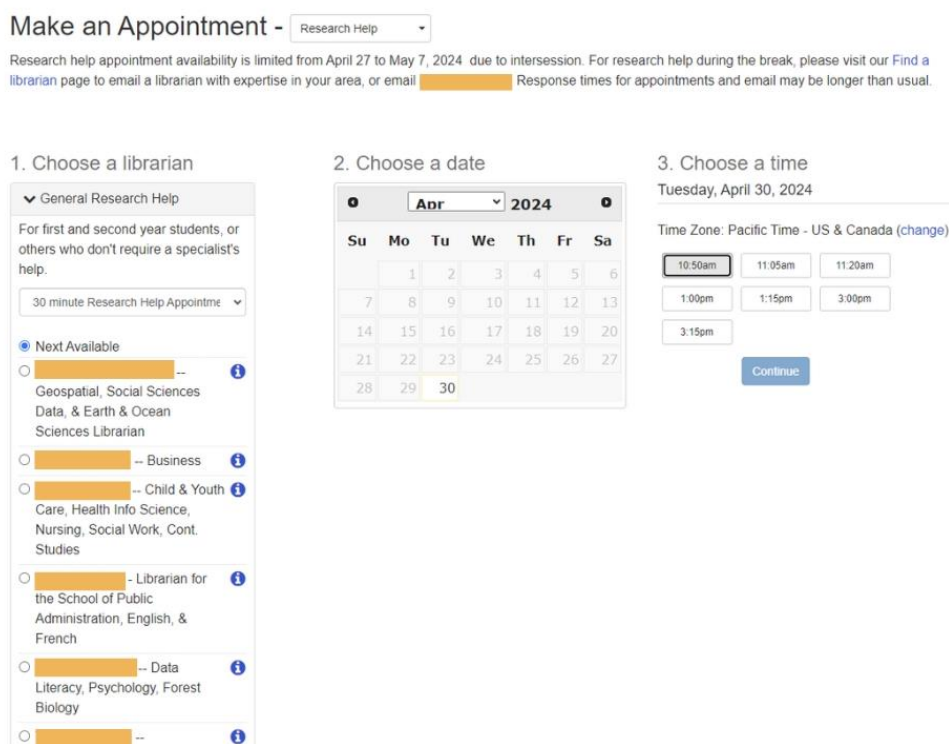


Most librarians belonged to more than one group—e.g., General Research Help as well as Humanities. Librarians in each group were listed in a consistent way using LibCal’s nickname function. Nicknames consisted of librarians’ full names, followed by their departments or areas of specialty.

This configuration created a new general appointments interface without disturbing the small number of existing librarian appointment interfaces. It also gave users the option either to book the next available librarian in the General Research Help group or to choose a specific librarian by their specialty. This was a vital aspect of the configuration as it allowed us to support the two user priorities we had identified: urgency and expertise.

If users chose General Research Help, all reference librarians’ calendar availability would be shown, meaning more availability and a quicker appointment time. If users chose a specific librarian for their expertise, they would see less availability and likely a longer wait for an appointment (see fig. 2).

Figure 2. Public view of LibCal, showing availability for general research help.



Each level of the configuration (location, group, and individual) has a stable, permanent URL that can be used to promote the service. This flexibility allowed individual librarians to link to their own booking availability in their email signatures or on their help materials, while still allowing us to promote the overall service to the campus as a whole.

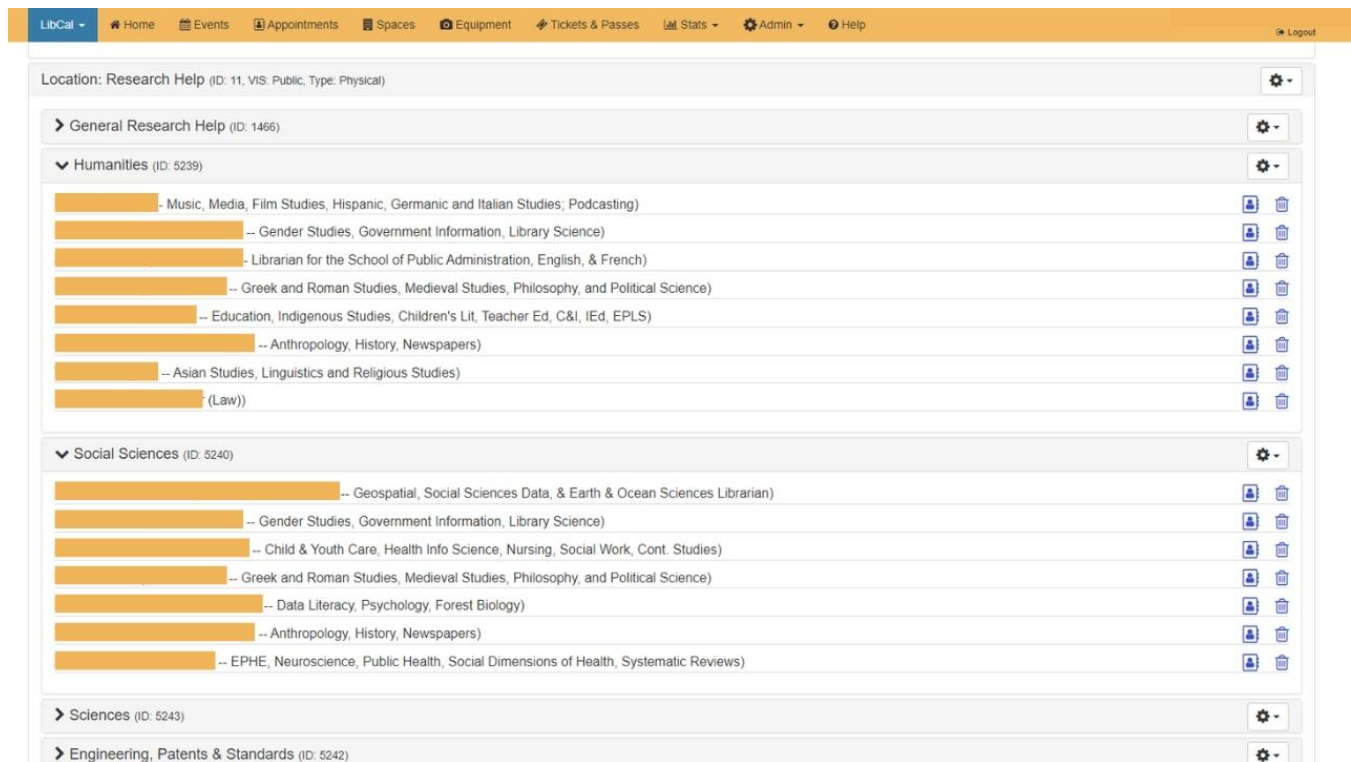
CONFIGURING LIBRARIANS’ LIBCAL ACCOUNTS AND TRAINING

LibCal allows librarians a significant level of customization in setting up their appointment booking interface, and the task group needed to decide where to standardize and where to allow flexibility and variation. Wherever allowing librarians flexibility was likely to create a challenging

experience for users, the task group decided to standardize. Wherever allowing librarians flexibility was likely to have little to no negative impact on users, the group decided to allow flexibility.

As mentioned above, consistent nicknames were created for all reference librarians to reflect their areas of expertise (see fig. 3.) Consistency was considered important here in order to prioritize comprehensibility for users on the main booking page.

Figure 3. Image of LibCal librarian view, showing librarian names and nicknames.



LibCal also allows librarians to write a brief statement about themselves or their services, which is presented to users behind an “i” icon beside the librarian’s name. Because this information wouldn’t be presented automatically to all users on the main booking page, the task group allowed flexibility and variation.

LibCal provides several parameters for the booking of appointments. The task group made recommendations regarding these, including the following (see fig. 4):

- **Advance notice:** The group initially asked all librarians to require three hours advance notice before an appointment could be booked. This was intended to allow librarians to prepare but to preserve flexibility for users to book same-day appointments.
- **Look and feel:** The group recommended all librarians use the default color scheme.
- **Booking window:** The group recommended that users be able to book a maximum of 30 days in advance. This was intended to prevent users from monopolizing a librarian’s calendar or making appointments so far in advance that they forgot or missed them.
- **Appointment duration:** The group recommended 30 minutes but allowed flexibility for librarians’ discretion, as consultations showed that some disciplines generally needed longer times.

- **Cushion:** The group recommended 15 minutes between appointments, to allow time for librarians to refresh and prepare.
- **Location:** The group recommended librarians provide both remote (Zoom or phone) and face-to-face appointments but initially left it to librarians' discretion about where to meet. The task group created a common directional digital map for librarian offices that was uploaded to LibCal and sent to users with their booking confirmation.
- **Appointment instructions/description:** The task group left this to librarians' discretion since research needs vary widely.
- **Appointment form file uploads:** The task group recommended that librarians allow users to upload files such as assignments or syllabi, to help the librarian prepare.
- **Follow-up email to patron:** The task group initially left this to librarians' discretion. Some librarians chose to create their own assessment tools for their research help appointments and included links in their follow-up emails.

Figure 4. View of LibCal's configuration options for librarian appointments.

The screenshot displays the LibCal 'My Settings' interface. At the top, a navigation bar includes 'LibCal', 'Home', 'Events', 'Appointments', 'Spaces', 'Equipment', 'Tickets & Passes', 'Stats', 'Admin', and 'Help'. Below this, the 'Appointments' section is active, with sub-links for 'My Appointments', 'Availability', 'Calendar', 'Booking Explorer', 'My Settings' (highlighted), 'Booking Forms', 'Integrations', and 'Widget/Embed Code'. A message indicates the user is editing their account. The 'Booking Limits' section offers three options: 'Use the system-wide booking limits' (selected), 'Do not use any booking limits', and 'Set your own custom booking limits'. The 'Appointment Settings' section includes dropdown menus for 'Patron Must Book In Advance' (1 hour), 'Patron Can Cancel Appointment' (0 hours), and 'Patron Booking Window' (14 days). It also features text input fields for 'Public Nickname' (with a preview), 'Friendly URL', and 'Map Image'.

Initially, librarians were instructed to use the configuration that would automatically integrate LibCal with their Outlook calendar. This meant that whenever the librarian's Outlook calendar showed availability, LibCal would also show them as available for an appointment (assuming other criteria were met, such as cushion time and advance notice.)

The task group provided librarians with detailed account setup documentation as well as individual setup help and training in LibCal's appointment change, referral, and cancellation features.

However, a final major training and documentation challenge occurred in August 2022, immediately before the service was due to launch. It came to light that although a handful of UVic

librarians had been using the LibCal appointments module with Outlook integration, the integration method itself did not actually meet the university's information security requirements. Because the university did not at the time support OAUTH2, librarians were using a deprecated "basic authentication" method that contravened security requirements, and the process had to be discontinued.

The task group had to find a new way for librarians to integrate their Outlook and LibCal availability. The new method required librarians to designate three to four office hours per week in their Outlook calendar and then manually designate their availability in LibCal for the same hours. This was suboptimal, as it meant training librarians to make these changes and reminding them to maintain their availability in two locations (e.g., during vacation time, observing holidays, managing schedule changes, etc.). However, the task group and librarians were able to make the transition, and the launch proceeded as planned for September 2022.

PROMOTING THE SERVICE

During the era of the reference desk, there was no mention of research help on the Libraries' website. With the change to appointments, it was essential for users to discover and use the online bookings form, so this was an opportunity to highlight a valuable service that hadn't received much promotion in the past.

The task group placed a "Book a librarian" link on a persistent "Quick Links" sidebar that appears on the home page as well as throughout the website (see fig. 5.) A new "Book a librarian" page was created as a landing page for the link, and links were added to relevant pages throughout the website. This change alone hugely increased the visibility of the service.

Figure 5. The UVic Libraries "Book a librarian" page, with persistent sidebar.

The screenshot shows the UVic Libraries website's "Book a librarian" page. The page layout includes a top navigation bar with "Contact us" and "What's new?" buttons. The main content area features a breadcrumb trail: "home » get help » find a librarian". The title "Book a librarian" is prominently displayed. Below the title, a paragraph states: "Librarians are available to help you at any stage of your research process! Book an appointment for help with:" followed by a bulleted list:

- developing your research topic
- crafting your search strategy
- managing your data
- understanding how to cite your sources
- and so much more!

The "Book now" section follows, with the text: "Book an appointment to get help from a librarian in person or via Zoom. You can book online in advance according to your schedule. Most appointments are 30 to 45 minutes, but you're welcome to just use a few minutes if that's all you need." Below this, it says: "Just need help fast? Book the next available librarian." and "Looking for help on a particular subject? Book an appointment with a subject liaison librarian or browse our list of specialists. You can always email librarians directly if you don't see an appointment here that fits with your schedule."
The right sidebar contains three sections:
1. "FIND ARTICLES, BOOKS & MORE" with a search bar and "More search options" link.
2. "ASK US" with contact information: "Email askus@uvic.ca", "Chat with a librarian", and "Phone 250-721-8230", plus a "More ways to contact us" link.
3. "QUICKLINKS" with a list of links: "My library account", "Book a librarian", and "Request an".

Because the new service model was launched in September, promotion efforts were wrapped into the usual fall orientation activities in the form of handouts and bookmarks, mentions in the faculty and staff newsletters, scripts for tour providers, and posts to the Libraries' social media.

ASSESSMENT, USAGE, AND INITIAL FEEDBACK

The task group established multiple measures of success, including:

- How many appointments were made, compared to the previous model?
- How much librarian availability was there, compared to the previous model?
- How aware were students of the availability of research help appointments?
- How often did students decline to make an appointment when referred?
- How many appointments are done remotely vs, in person?
- What was the user experience of making appointments?
- What was the staff experience of triaging and referring to appointments?
- What was the librarian experience of providing appointments?

LibCal was helpful in answering some, but not all, of these questions. Because LibCal automatically records appointment bookings, it was relatively straightforward to assess how many appointments were made. In fall 2022, users booked 216 appointments, compared to 209 interactions recorded on the reference desk in fall 2021.

LibCal doesn't provide an easy accounting of librarians' availability (as opposed to their appointment bookings). In order to know whether librarian availability was keeping pace with the past standard of 30 hours per week, staff manually tracked this in a spreadsheet. Librarians were available for 567 hours in fall 2022, or about 35 hours per week of the academic term.

Because we tracked availability separately from appointment bookings, we could also calculate the proportion of appointments to availability. If a greater proportion of available time booked indicated greater need, this could be used as a proxy measure of student need at different times of the term. The group found that proportional use—or need—peaked in late September, late October, and to a lesser degree in mid-November and early December.

To know how many students declined to book appointments when they were referred to them, staff were asked to hand-tally turnaways using an existing widget outside of LibCal. In fall 2022, 52 students declined to make appointments when referred to the online form. The number of declines was highest in September and diminished through the term. In spring 2023, only six students declined to make appointments when referred.

To assess students' awareness of the appointments service, staff surveyed students in the library and at three other high-traffic campus locations: a new first-year residence, the student union building, and the campus dining hub. In mid-October and again in late November, students were asked if they knew that they could book a research help appointment with a librarian. If students weren't aware, they were offered a handout describing the service. Over one thousand students were surveyed overall, and between the first and second surveys, their awareness of the service increased from 16% to 41% of those surveyed.

LibCal can easily report the proportion of in-person vs. remote appointments. However, our initial configuration didn't support this, so staff manually calculated it using the Booking Explorer at the end of the academic year. Over the year, more than half of all research help appointments were

done remotely. However, most remote appointments were done by one or two librarians who served distance students. Somewhat surprisingly, most other librarians did more in-person than remote appointments.

To assess students' experience of making appointments, a short LibWizard survey was sent to users who booked research appointments in March–April 2022, using LibCal's automatic follow-up email function. Students who responded were entered into a drawing to win a UVic Bookstore gift certificate. The survey received 22 responses. Respondents perceived the appointment service as "very welcoming" (86%) or "slightly welcoming" (14%). Ninety-five percent of respondents said they would use the service again. Ninety-five percent said that it was clear to them what types of help they could get from the appointment when they booked it. One user pointed out that the appointment confirmation email didn't include a clear indication of the location of the appointment (e.g., remote vs. in person).

To assess how staff experienced the new service model, a survey was sent to them and an in-person meeting was held. Staff shared that some students showed reluctance to book appointments or seemed to need immediate help, some students got lost trying to find their appointment, and not enough same-day appointments were available.

To assess how librarians experienced the new service model, a survey was sent to them and an in-person meeting was held. Many librarians felt that they were receiving fewer research help questions than in the past, while some felt they were receiving more or the same number. Some librarians didn't feel confident referring appointment requests to their colleagues in LibCal, or canceling requests after they were referred. Some librarians missed the frontline experience. Others commented that because students changed appointment details frequently, it was challenging to keep track of whom they were meeting and when. Some also reported that students booked remote appointments but then came in person, or booked in person but failed to arrive or arrived too late to meet.

IMPROVEMENTS

In response to the assessment data, the following changes and improvements were made, either in LibCal or procedurally:

- To address a shortage of same-day appointments, we changed LibCal's three-hour advance appointment notice to one hour. This meant that students seeking an appointment early in the day had a greater chance of seeing librarian availability later the same day, while still preserving prep time for librarians.
- To address student reluctance to book appointments, we changed appointments to one of three standard durations: 15, 30, or 60 minutes. The shorter appointments were intended to be less intimidating for students who felt their questions "didn't merit" a longer appointment. We changed website wording to be more welcoming and to clarify all the services librarians could provide. We also asked the coordinators of the campus writing requirement course to help promote appointments, since they could reach thousands of students each year.
- To address students getting lost on their way to in-person appointments, we changed policy and wording so that librarians met all users for in-person appointments at a single, consistent location. We removed the digital map from LibCal and increased appointment cushion times slightly to allow for librarian travel time.

- To address staff and librarian perceptions that appointments weren't being used, we shared usage stats, which showed similar rates of usage to the reference desk.
- To address librarians' lack of confidence with referring, changing, and canceling appointments in LibCal, we created more documentation and offered one-on-one support. We also created an internal LibGuide (another Springshare app) that housed all the training documentation in a single location.

FOR THE FUTURE

As we continue to use and assess the research help appointments model, we have many improvements and changes still to make.

We will continue to develop longitudinal assessment data related to students' awareness and use of research help appointments, through collecting usage data from LibCal and from continuing our promotion and communication work. In particular, we will seek ways to make appointments clear, welcoming, and accessible for students who are shy, introverted, equity-deserving, inexperienced with academe, or who have language or cultural barriers.

We are looking forward to a near-term campus transition to Microsoft Exchange which will allow us to integrate LibCal with Outlook in a secure way. This will allow us to dispense with librarian office hours in LibCal and will instead show librarians as available for research help appointments whenever they are free in Outlook, reducing administrative overhead and increasing accessibility.

While assessing appointment modes, we realized that allowing flexibility in librarians' appointment booking forms creates a challenge for assessment. Because LibCal treats every librarian's form independently, downloading appointment data for all librarians results in enormous spreadsheets of near-duplicate data. Both to streamline assessment and to make for a more consistent user experience, we have recently adopted a single streamlined appointment form.

We have found Springshare to be a responsive vendor and are hopeful that they will consider making some changes to LibCal that will increase its utility for us. An automated way to track librarians' availability would be helpful, since it could be crosstabbed with appointment bookings, mode of booking, time of appointment, and other information facets to learn far more about user preferences and habits.

CONCLUSION

Transitioning away from the reference desk to a research help appointments model was important for many reasons, including responsiveness to user behaviors and strategic use of librarian time. However, it was a significant and complex transition to manage. It involved not only changes to the location and mode of a service, but also changes to individual and unit workflows, the relationships and communication habits of staff and librarians, and the shared culture and principles of one of the library's longest-running services.

While the technological aspect of the change was essential, it was in some ways the least challenging to manage. LibCal proved relatively simple and flexible to adopt and was able to accommodate practically all of the needs we identified at the outset of the project. Its reporting tools are particularly useful. When some staff and librarians maintained reservations about the change, we were easily able to pull data that demonstrated success. Librarians are also able to pull their own data to assess their usage trends, or to report on their activities. The automatic

collection of appointment statistics provides much more reliable data about this service area than we had previously, when reference desk statistics were made and collected manually.

Overall, the transition to the research help appointment model with LibCal has accomplished our goals of making more strategic use of librarian time while preserving or enhancing service to users. It has improved the accessibility of our research help service because it allows students to make appointments remotely. It has improved the visibility of the service, which is reflected in stable or increasing usage numbers. It has also improved the reliability of our statistics and allowed us to assess this service area more effectively. While implementing the change took time and effort, we have now successfully transitioned to an operational phase and look forward to continued improvements in future.

ENDNOTES

- ¹ “Academic Libraries in the United States: Statistical Trends,” American Library Association, accessed July 19, 2024, <https://www.ala.org/tools/research/librystats/academic/academiclibraries>.
- ² Laura Rose Taylor, “2021 ACRL Academic Library Trends and Statistics Survey: Highlights and Key Academic Library Instruction and Group Presentation Findings,” *College & Research Libraries News* 84, no. 4 (April 3, 2023): 149, <https://doi.org/10.5860/crln.84.4.149>.
- ³ Dennis B. Miles, “Shall We Get Rid of the Reference Desk?” *Reference and User Services Quarterly* 52, no. 4 (2013): 320–33, <https://doi.org/10.5860/rusq.52n4.320>.
- ⁴ Jodi Jameson, Gerald Natal, and John Napp, “Evolving and Enduring Patterns Surrounding Student Usage and Perceptions of Academic Library Reference Services,” *College & Research Libraries* 80, no. 3 (April 3, 2019): 366, <https://doi.org/10.5860/crl.80.3.366>.
- ⁵ Idunn Bøyum, Katriina Byström, and Nils Pharo, “Is the Reference Desk Used for Reference Interviews,” *Reference Services Review* 49, no. 1 (2021): 79–93, <https://doi.org/10.1108/RSR-11-2020-0066>.
- ⁶ Miles, “Shall We Get Rid of the Reference Desk?”, 321.
- ⁷ Miles, “Shall We Get Rid of the Reference Desk?”, 328.
- ⁸ Jason Coleman, Melissa N. Mallon, and Leo Lo, “Recent Changes to Reference Services in Academic Libraries and Their Relationship to Perceived Quality: Results of a National Survey,” *Journal of Library Administration* 56, no. 6 (August 17, 2016): 673–96, <https://doi.org/10.1080/01930826.2015.1109879>.
- ⁹ Christina E. Holm and Sarah Kantor, “Reference Is Not Dead: A Case Study of Patron Habits and Library Staffing Models,” *portal: Libraries and the Academy* 21, no. 2 (2021): 299–316, <https://doi.org/10.1353/pla.2021.0017>.
- ¹⁰ Hazel McClure and Patricia Bravender, “Regarding Reference in an Academic Library: Does the Desk Make a Difference?”, *Reference & User Services Quarterly* 52, no. 4 (2013): 306, <https://doi.org/10.5860/rusq.52n4.302>.

-
- ¹¹ Jackie Stapleton, Caitlin Carter, and Laura Bredahl, "Research Consultations in the Academic Library: A Scoping Review on Current Themes in Instruction, Assessment and Technology," *The Journal of Academic Librarianship* 46, no. 4 (July 1, 2020): 102156, <https://doi.org/10.1016/j.acalib.2020.102156>.
- ¹² Gregory M. Nelson, "LibCal: A Product Review," *The Reference Librarian* 57, no. 1 (January 2, 2016): 57–72, <https://doi.org/10.1080/02763877.2015.1096226>.
- ¹³ Ngoc-Yen Tran, "Leveraging Springshare's Appointments Scheduler for Research Consultations: Experiences and Recommendations," *The Reference Librarian* 60, no. 4 (October 2, 2019): 277–87, <https://doi.org/10.1080/02763877.2019.1631938>.
- ¹⁴ Taylor, "2021 ACRL Academic Library Trends and Statistics Survey," 151.
- ¹⁵ Anna Marie Johnson, "Connections, Conversations, and Visibility: How the Work of Academic Reference and Liaison Librarians Is Evolving," *Reference & User Services Quarterly* 58, no. 2 (Winter 2018): 92, <https://doi.org/10.5860/rusq.58.2.6929>.
- ¹⁶ Debra G. Warner, "A New Classification for Reference Statistics," *Reference and User Services Quarterly* 41, no. 1 (2001): 51–55.