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Using Gimlet to Improve Service at the Library

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Abstract

In 2011, Johnson County Community College's Billington Library first piloted and then implemented a low-cost online reference statistics tool called Gimlet. The system replaced an outmoded and inaccurate pen-and-paper statistics system. This paper details the struggles and advantages of this change. Implementation and training programs are discussed, as well as strategies for generating staff buy-in. Both the expected and unexpected advantages of a Gimlet based online system are explored, and future directions for the system are described.

Libraries looking for a very low cost, easy to implement electronic statistics solution should consider Gimlet. The experience of JCCC's Billington Library can serve as an effective road map.

Introduction and History

In 2011, Johnson County Community College's Billington Library was looking for a solution to a common problem at reference desks – how to track and manage question and answer statistics. The library was still using a paper-based system with hashmarks for statistics, adding them up manually every day. It was time to move into the twenty-first century. Luckily, a solution presented itself at Library Camp Kansas in July of 2011. The State Library of Kansas did a short presentation on Gimlet, an inexpensive option that was able to track reference statistics as well as create a knowledgebase (Schulz). This was seen as incredibly valuable as the library had two new librarians at the time. The knowledgebase would help these new librarians to better answer patron's questions about campus as well as help all staff members assist students with tricky

assignments.

For previous years, activity at the Reference and Information desks have been recorded with a pencil-and-paper tally system, as presented in Figure 1. Horizontally divided by full hour, one would make a series of vertical hashmarks each time a question was asked: one in the first area to indicate if the question was in-person or via phone; another in the second area to indicate the type of question being asked; and the third area indicates whether one used print, electronic, or "other" resources in answering the question.

In its most straight-forward interpretation, each question asked would therefore have a total of three hashmarks made on the sheet, and each third of each hour column would therefore have an equal number of hashmarks. The information one could determine would be the traffic per hour, the types of questions being answered, and the frequency with which print and electronic (and "other") resources were being used to answer patron questions.

Johnson County Community College *K.C. State*

Day <u>Tuesday</u>		Date <u>10/18/11</u>													
	7:30	8:00	9:00	10:00	11:00	12:00	1:00	2:00	3:00	4:00	5:00	6:00	7:00	8:00	9:00
Desk			(3) 	(3) 	(3) 	(9) 	(14) 	(11) 	(9) 	(9) 	(9) 	(8) 		(4) 	
Phone									(1) 	(1) 					
Reference			(2) 	(3) 	(4) 	(3) 	(4) 		(3) 	(2) 	(2) 	(3) 		(3) 	
Technical			(2) 	(1) 		(1) 	(2) 				(2) 			(1) 	
Direction			(1) 			(2) 	(5) 	(3) 	(4) 		(5) 	(3) 			
Print				(1) 			(1) 	(1) 							
Electronic			(2) 	(2) 	(2) 	(3) 	(2) 	(3) 	(2) 	(2) 	(2) 	(3) 		(3) 	
Other			(1) 	(1) 		(6) 	(10) 	(7) 	(8) 	(9) 	(6) 	(3) 		(1) 	

WU work Nov. 6.

Fig. 1. A typical sheet documenting one day's interactions at one service point.

In its actual implementation, several issues arrived in documenting, interpreting, and reporting interactions. Column thirds did not always add up, librarians citing that they used both print and electronic resources for a particular question. Some would also count each part of a user question as different questions. While that may have lead to its own inconsistency, the librarian may or may not have then counted the resource format multiple times (say, for example, if both parts of a question were both answered with the same electronic resource). Thus, the actual number of questions could not be determined. Creating an actual picture of desk activity was impossible.

Also, using the hand-entered hashmarks did not reflect a full portrait of our service output. Each sheet represented one day for one service point, and three total service points were documented. In order to convey the usage to the college Board of Trustees, an administrative assistant in the library would manually discern the individual questions, total them up per sheet, then report the month's total. With three service spots over 30 days, months would create about 90 sheets to count a month. The 1,080 sheets contributing to our annual total have already been illustrated to require some interpreting between the three hash zones to find a semi-accurate depiction of question totals. Because of the encumbrance on one's time, the extra gathered data (hours in which questions were fielded, materials used, even types of questions) were not extrapolated.

With a sizeable number of paper statistic sheets already printed, alternative reference methods were discounted in the document forms. Email reference and chat reference were eventually integrated into the library's services, but without a fast, ready method for documenting those interactions, ad hoc systems were developed. These systems existed outside of the reporting sheets, and the participation rate in documenting them was much lower.

Also absent is a way to indicate which service point the questions were being fielded from. With no way of distinguishing between Information or Reference desks, the totals reflect an overall use and not a service points' usage in any given data segment. One could also, then, not tell if a particular point were not generating data (for example, if a position were temporarily vacant during a measured time frame).

Literature Review

Many libraries struggle to efficiently measure patron interactions. In 2002, Eric Novotny conducted an extensive survey of reference service statistics and assessment for the Association of Research Libraries. Libraries were very dissatisfied with their reference systems. As a group, the libraries Novotny surveyed rated themselves as "below the minimum performance level" for the analysis and use of reference transaction data and just "above the bare minimum performance level" for recording reference transactions (11). At that time, 99% of libraries were paper tally sheets to record transactions.

Since 2002, many libraries have moved towards electronic statistics tools, and their struggles have been well documented in the literature. In 2006 Texas A&M University Libraries built a web-based statistics system to replace a paper statistics sheet (Smith). The library at the university of Queensland developed LibStats, an open source application to replace their paper statistics sheet in 2008. (Jordan) In 2010, the Zimmerman Library at the University of New Mexico evaluated reference tracking systems on several facets including method of recording, reporting, and time absorbed by recording and determined that an electronic database best met their needs. (Augilar) Helmke Library at Indiana University conducted a similar study and built their own online statistics database in 2010 as well (Garrison) In January of 2012 Western Washington University published a case study on their transition to LibAnswers, another online reference collection system.

In their papers, each library mentions the efficiency improvements that come with an electronic system. These libraries also found that the flexibility of online reference statistics systems is a distinct advantage. Traditional reference desk transactions have been declining for over a decade, as libraries move toward new discovery services and reference tools. (Murgai) As the University of Richmond library noted in 2004 “desk-centric reference statistics fail to take into account all the modes through which [libraries] currently deliver reference service.” (Rettig 7) Online systems can reflect all the ways reference librarians and library staff provide reference service.

Implementation and Training

The Reference and Information desks started their trial of Gimlet in July of 2011, mostly during the evenings and weekends. This time was chosen as these were the slower times at the desk which made it easier to trial a new product before implementing it during the day. Staff members recorded questions both in Gimlet and on paper statistics sheets in the beginning to make sure that data was being recorded and maintained correctly. Other staff members were slowly introduced to Gimlet and trained. In October, the library did a pilot project where all staff members used Gimlet instead of the paper statistics sheets. This went reasonably well and it was decided that the library would make a complete switch in November of 2011.

As Gimlet is an easy system to use, it only takes minutes to train someone on it. Training staff individually at the desk was found to be the easiest and simplest way to educate everyone on the new software. Handouts were also provided via email and in print as references. When the project team decided to expand the use of Gimlet to other service points in the library, team members held short training sessions so that multiple staff members could be educated at one time.

Both free and fee-based accounts are available in Gimlet. With the free account, one receives access to the knowledgebase functions, is able to have unlimited users of the service and is secured by SSL encryption. The fee-based account allows all of this plus access to the reports, a feature the library has found quite valuable in determining the busiest hours at the desk, the types of questions received and more. The library started out with a one month trial, and then went for the paid account which is \$120 for the year (“Gimlet”).

There are five fields available in Gimlet – Duration, Question Type, Asked by, Format and Location in addition to spaces for the question and answer, tags, time of question and initials of staff member. In the beginning of Gimlet, all five fields across the top of the screen were used as it was believed the more information gathered, the better. Those five fields are customizable and the Gimlet project team at the library have made many changes to them since the library started using Gimlet. As the project team examined what data the library may actually use to make decisions, the amount of information gathered about each question has been reduced.

The screenshot shows the original Gimlet interface for Billington Library. At the top, there is a dark header with the library name "Billington Library" and a "Change name" link. To the right is a "Sign out" link. Below the header is a navigation bar with buttons for "Add question", "Search", "Reports", and "My account". The main content area contains five dropdown menus for "Duration", "Question type", "Asked by", "Format", and "Location". Below these are two large text input fields for "Question" and "Answer". There is also a "Tags" field with a "Space separated - Showing promoted tags: More?" note and an "Edit tag list" link. At the bottom, there is a "Time of question" field with a "9:31 am" value and a "Save" button. A small example text "Ex: 3:15 pm, 4/15/09 8:03 am" is visible below the time field.

Fig. 2. Original Gimlet interface.

As one can see in fig. 2, librarians had a choice to make in every field when Gimlet was first implemented at the desk. Librarians would click on the appropriate response in each of the five fields, type out a question and answer if needed, add tags if needed, type out their initials, and then click on save.

The project team also had librarians typing out most of the full questions and answers. While all of this data was interesting, it was very time-consuming at the desk. After looking at the data from July through November, the project team also learned that certain categories of data did not

make sense being collected. Most patrons coming to the Reference and Information desks were students as noted in fig. 3 so taking the time to choose student, faculty/staff, public or unknown from a list did not make sense. Also, most questions were in the range of zero to nine minutes as seen in fig. 4 so this was another category that was removed. It was decided that unless the library had a real purpose for collecting the data and was going to use it to make a decision, it did not need to be gathered.

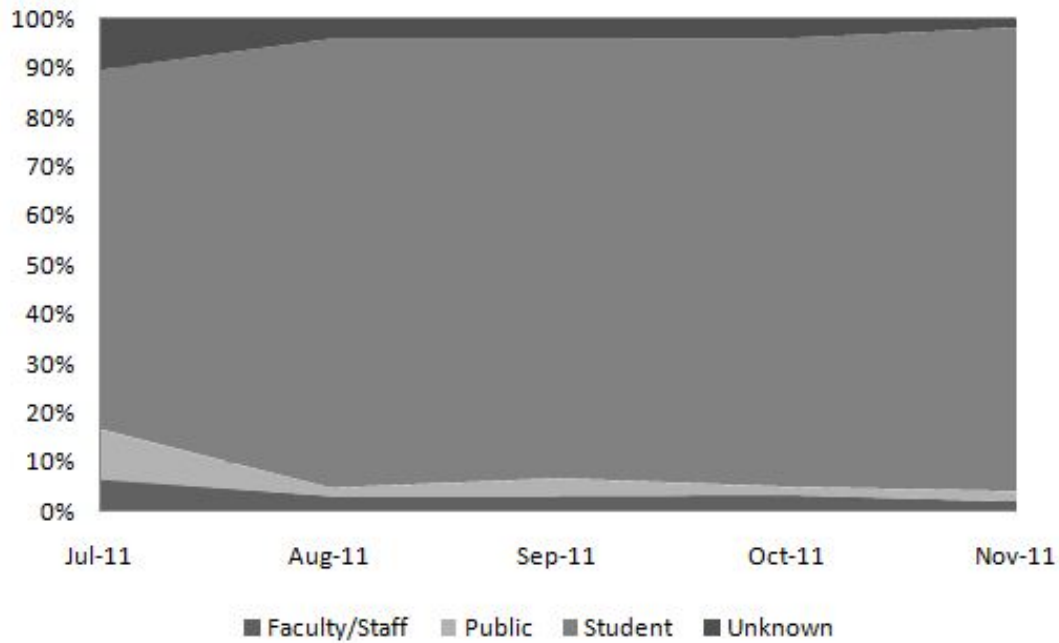


Fig. 3. Interactions by patron type: July - Nov 2011.

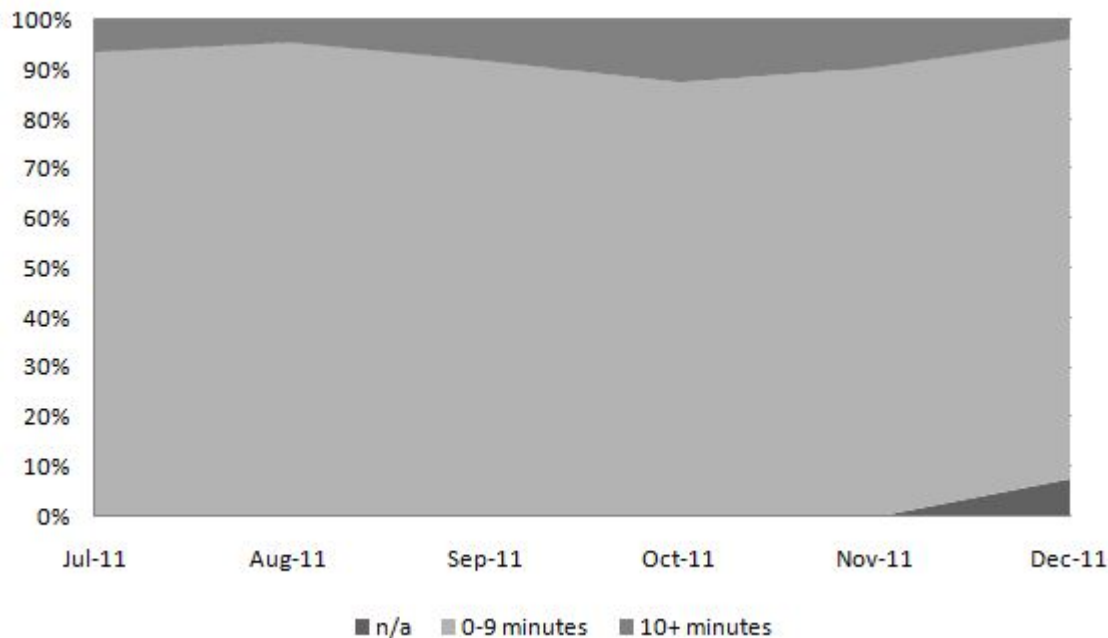


Fig. 4. Interactions by duration: July - Nov 2011.

The data collection in Gimlet has been streamlined since the first trial and initial roll-out. Figure 5 shows the library's current interface for the system.

Fig. 5. Current Gimlet interface.

Librarians now only fill out the question and answer fields when something unique or something that another librarian will need to know later comes up. The use of the tags field is now only for

when the library is doing a short-term study of an issue. The project team also decided to stop determining if librarians answered reference questions using a print or an online resource as this data can be easily pulled from other sources.

Issues

There were a number of issues that the library came across as this new service at the desk was implemented. Many librarians and staff members felt that Gimlet was too time-consuming. There was also some confusion as to what tags to use, when to type out a question and how to determine the type of question. Simplifying the input form and asking people not to tag questions or type out questions and answers unless absolutely necessary reduced the problems in this area.

Human error occurred when remembering to use Gimlet. It was not unreasonable to predict that occasionally one may forget to open the program when logging into their service point's computer, or perhaps begin manually keeping written statistics out of habit. Remembering to log statistics was an occasional issue with paper statistics, so it was not an unreasonable assumption this would be encountered with Gimlet. This became less of an issue as people grew accustomed to using electronic documentation.

Without a formal incident report system, the Email Forwarding feature in Gimlet could be of great service when sharing interactions. However, several IT issues prevented messages from being successfully delivered, involving how the JCCC campus recognized the incoming emails. It should be pointed out that this is a campus-specific issue, and not an error with Gimlet itself.

Buy-in

Feedback on the product was given informally through one-on-one conversations as well as through anonymous surveys. While an arguably sizeable amount of buy-in was produced by letting the period of adjustment play out, legitimate concerns were brought up in collecting feedback. To allow these concerns adequate weight, the use of Gimlet was first introduced on a trial basis, concluding with a survey to collect issues and assess satisfaction with the product and new process.

A primary concern amongst those who would be utilizing Gimlet involved the actual use of information and data collected within Gimlet. A discernible difference between adjusting staffing needs with justifying current employment seemed to exist. By explaining how the library could better track reference needs and service points, the opportunity to use Gimlet data to expand

service became a focus of the implementation. Others addressed time consumption and data loss (sometimes connected) as concerns in moving away from the paper system. An isolated comparison between a month of Gimlet data and that same month the previous year captured in paper static sheets showed nearly identical totals for questions being asked. It also revealed many of the issues in guesstimating the actual number of questions asked when using paper, as well as the limits of the data. Revealing this exposed possibilities to increase types of changes that could be implemented based on the extra information.

When a second, nearly identical survey was given months after Gimlet had become a regular part of on-desk duties, the overall opinion of Gimlet as a useful collection device was rated higher than at the end of the trial. The importance placed on the categories of data collected was higher, and the objections were fewer and perhaps less impassioned than before.

When extending data collecting to the lone 2nd floor service point, it was again implemented on a trial basis, not only allowing users time to become acquainted with the tool, but also allowing the Gimlet implementation team to determine if the data gathered was valuable. Face-to-face conversations with those executing data collection, by a great majority, indicated that it was not an encumbrance to record interactions. The primary issue for those involved was remembering to log-in when arriving at the desk. Given the lack of intrusion for collectors and the benefits of recording the interactions, it was determined to be implemented as a permanent measure.

Library Gains due to Gimlet

As indicated before, it was the previous responsibility of a sole employee to add the interactions across hundreds of sheets, and attempt to extrapolate data. With no need to manually calculate these interactions, the work-hours given back to the college justifies the cost of the product, likely a few times over. The data is also instantly more meaningful, with ability to export; view data by segments such as question type, hour, and location; easily compare date segments; and keyword search text and tags used for questions. With agreed-upon tags, the library can track issues (such as recurring technological support needs) and provide a comprehensive picture to appropriate supervisors and departments when communicating needs. The use of the tag “librarian911” has also created an opportunity for librarians to flag questions which they may not be satisfied in their answers. Given the repetitive nature of questions in academia (as many students have the same assignments), this allows collaboration and preparation in better supporting the reference needs of the campus user base.

By tracking repetitive questions as asked, librarians can address information seeking behaviors and create better paths between patrons and resources. One example of this involves students who would ask for an article their professor wrote, which many understood as being located “in the databases.” The article was actually in the electronic course reserves, which is not accessible via direct url. Tracking this question reveals dozens of at-desk requests per semester. To simplify

the access, librarians were able to move the article into JCCC's Institutional Repository, give the link to the professor, and simplify the discovery process for students.

A side benefit of collecting and recording interactions is the creation of a knowledgebase. By having an easily searchable collection of questions, employees have documented answers that can be of service for rapid response to patrons. As this continues to be bolstered, the ability to sort by date ensures that it will continue to be useful as resources and services evolve.

Another realized benefit of the move to Gimlet is that it has allowed the library to track issues at the desk in a much more manageable and reportable way. Rather than just relying on subjective reports from librarians and other staff, the library now has objective data that can be used in decision-making. For instance, when students were having problems with printing from ANGEL, the college's online course management system, the library was able to set up a tag to track how often the problem came up and then share that data with the college's information services staff. (fig.6)

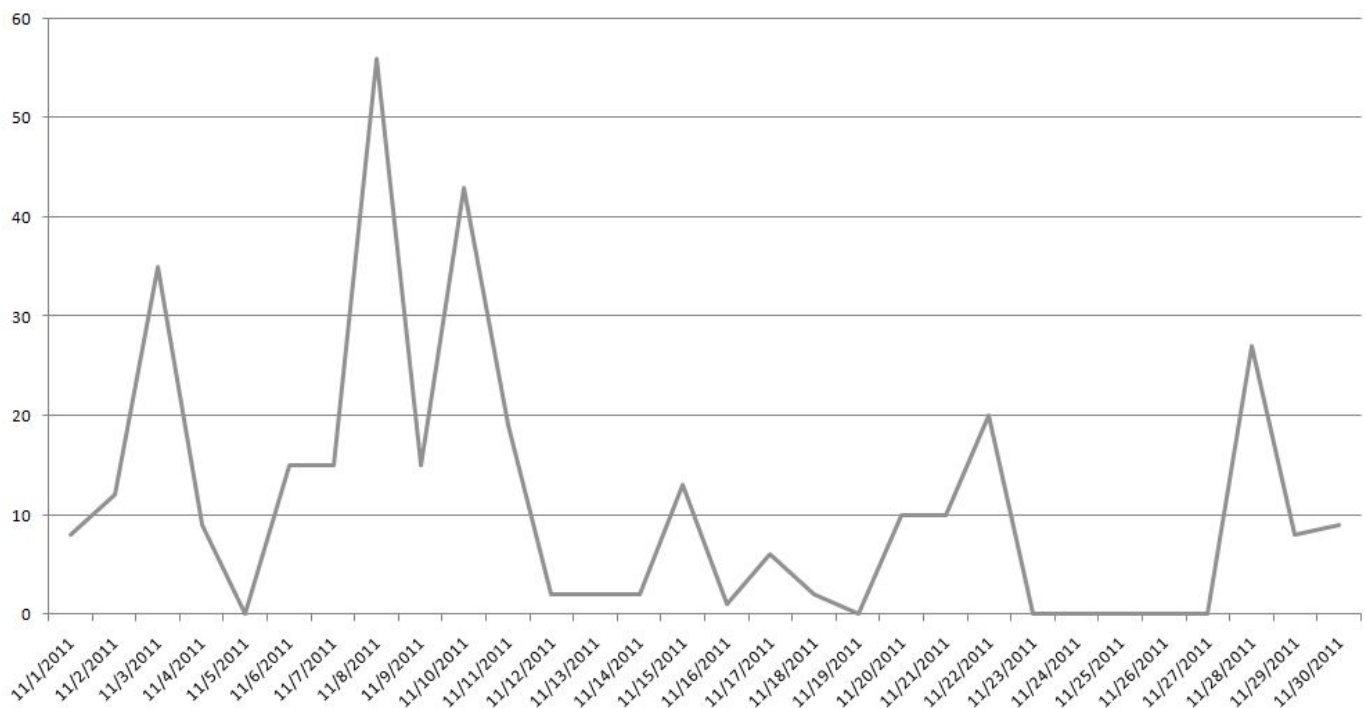


Fig. 6. Interactions tagged with ANGEL printing problem - Nov. 2011.

Gimlet also allows the library to see the types of questions received at the desk and to visualize the ebb and flow of research papers and projects throughout the semester. More intensive assignments tend to be due around midterms, thus leading to more reference questions at the desk during these times as evidenced in fig. 7.

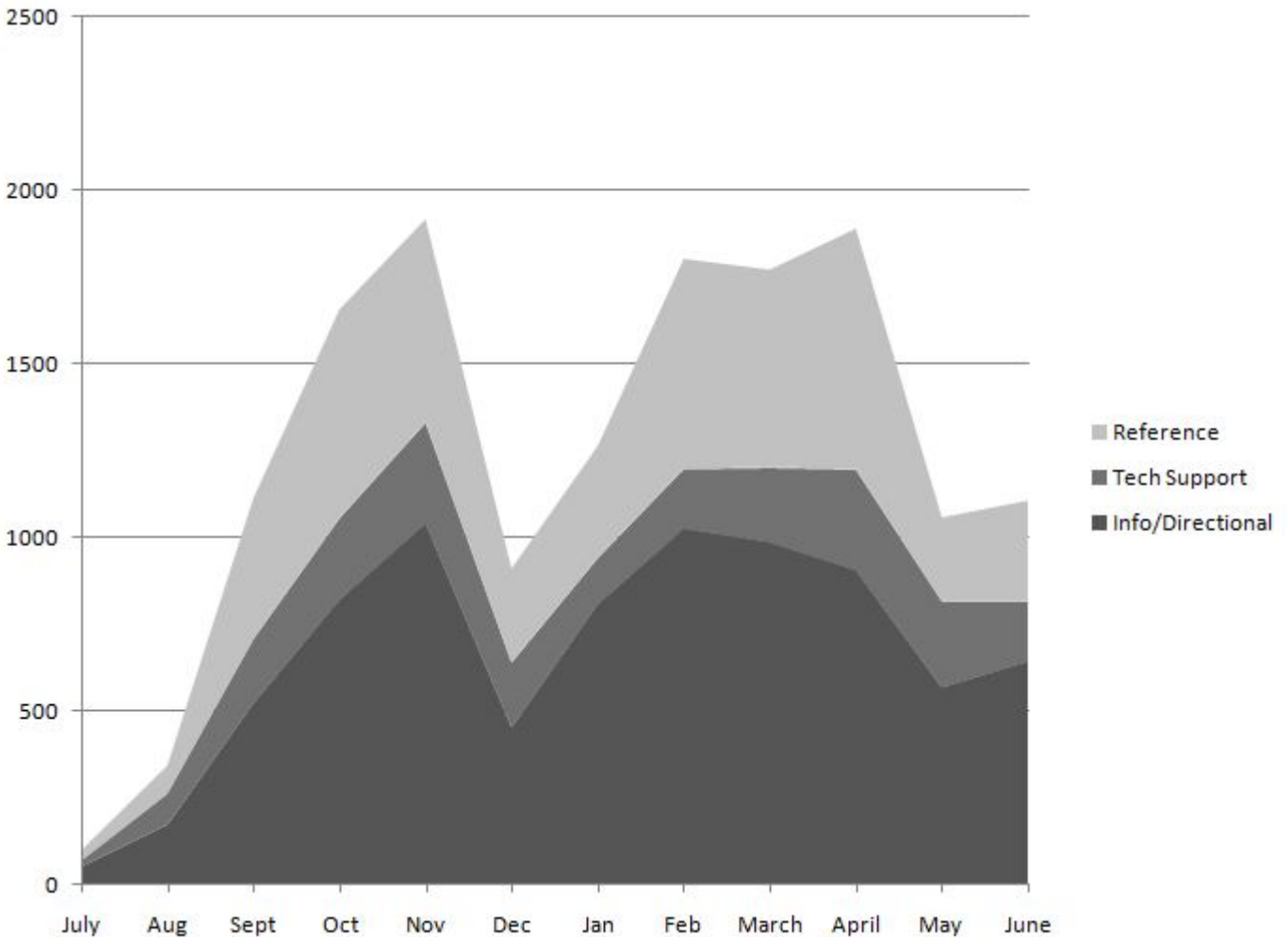


Fig. 7. Interactions by question type: July 2011 - June 2012.

The Future of Gimlet

As Billington Library’s use of Gimlet progresses, the expected future gains have the ability to outweigh its few hindrances. The Email Forwarding continues to be an off and on issue. Some additional statistics, such as bibliographic instruction classes taught, would ideally been streamlined into a single statistical tool. Unfortunately, Gimlet is not always compatible. At the time of submission, the chat reference service, Meebo, is set to be retired on July 11, 2012 (“Meebo Discontinued Products”). As the library looks for alternative chat reference services, an ideal solution would have an option to export directly into Gimlet. This may seem slightly unreasonable, but the added step of re-documenting what will be captured in chat-logs of an eventual replacement product is a duplication that will almost certainly have to be accepted.

However, with added data collected, there are great opportunities to expand and optimize our services. By tracking typically busy and slow times, the library could adjust active on-desk

reference support, freeing staff time to implement services like roving reference, off-desk chat-reference monitoring, embedded librarianship or a number of other things that may or may not be reference-specific. Gimlet also will allow staff to track common or confusing issues in the library and help in determining what improvements can be made. The library has changed some of its course reserve procedures and is also looking at signage changes due to issues that have come up in Gimlet.

The only service location currently not collecting information is the front location which houses reserve materials, creates student IDs, and handles circulation service (affectionately called “Megadesk”). Documenting circulations in Gimlet would be time consuming and redundant since stats can be acquired through our OPAC, and many questions they receive are deferred to the reference desk. However, there are interactions of value to collect, and the library is currently investigating the appropriate workflow to accommodate this.

Information from Gimlet will also play a vital role in the library’s ongoing metrics initiative. In the Fall of 2011, in response to JCCC’s strategic goal to make “data and evidence..an essential part of our decision-making,” Billington Library formed a group to improve and streamline library-wide metrics (“JCCC Strategic Plan”).

The library’s plan for improving metrics has two parts. The first part is to create a “Dashboard” of key operational metrics. This dashboard will allow librarians, staff, and administration to easily track the progress and business of the library. An example of one JCCC’s dashboards is seen in fig. 8. The dashboard will allow all library staff at all levels to measure the impact of their work.

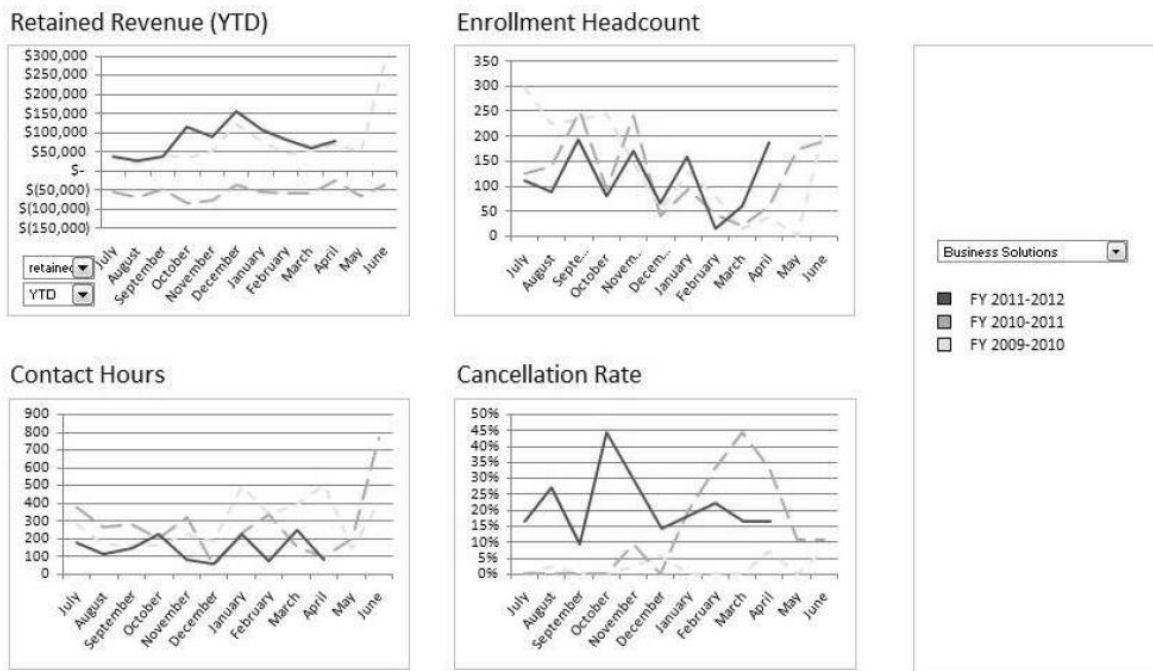


Fig. 8. Example JCCC departmental dashboard. Courtesy of JCCC Office of Institutional Research.

Gimlet will also play an important role in the second part of the library’s metrics initiative: an ongoing program of one-off data collecting projects targeted towards a particular service, need, or potential change. Each semester, the library will design a research project, collect data, and then use the data to make management recommendations. Library staff are extremely wary of collecting unnecessary, unused data and therefore no project will be undertaken without a specific policy or procedure change in mind.

Potential ideas have already sprung up from all corners of the library including: analyzing the usage of library study rooms, exploring patron usage of streaming versus physical A/V material, and counting patron interactions at particular library service desks to maximize staff impact.

Gimlet’s flexibility as a data collecting tool will be extremely valuable in designing these research studies. Gimlet’s tags, fields, and reports can be used to collect specific data for these projects, and there will be no need to have to re-design a metrics system for each one. For example, patron interactions involving problems with the library’s printing system, PaperCut, can be marked with tags for a single semester. Then, all marked entries could analyzed to show when and where printing problems occur and how printer trained staff can be used best.

Library staff hope that through these two parts of the metrics initiative the library can count fewer statistics and use them more effectively. Ideally, all library metrics will fall into one of the two categories. Either they are one of a small number of library statistics that appear on the dashboard and are used regularly, or they are collected temporarily to explore a potential policy or procedure change.

Gimlet is sure to play a decision-making role in the future directions of Billington Library.

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