PaLA | College & Research
Division (CRD)

Pennsylvania Libraries: *Research & Practice*

Practice

Online Appointment-Scheduling for Optimizing a High Volume of Research Consultations

Carmen Cole and Lauren Reiter

Carmen Cole is Information Sciences and Business Liaison Librarian at Penn State University, ccc143@psu.edu

Lauren Reiter is Sally W. Kalin Librarian for Learning Innovations and Business Liaison Librarian at Penn State University, lmr29@psu.edu

Librarians at Penn State University piloted the online appointment-scheduling tool YouCanBook.me to determine its effectiveness in facilitating a high number of research consultations and improving an embedded service model. Librarians sought to leverage the tool to work with as many students as possible while balancing other duties. This article details using YouCanBook.me for this specific application, provides data and evaluation of the pilot, and explores possibilities for scaling usage of this scheduling tool in other library settings, both large and small.

Introduction

Since 2013, Penn State library personnel have worked directly with over 5,000 students enrolled in an entry-to-major course through an ongoing partnership with a faculty member in the Smeal College of Business. The course incorporates the library's embedded service model, which involves a semester-long commitment to providing highly individualized reference and instruction support. Students enrolled in Management 301 are required to complete a company research assignment and meet with a Schreyer Business Library research consultant. In order to work closely with a high volume of students, the research consultations need to be well-organized to ensure the optimal experience for both students and library personnel.

In spring 2016, we introduced YouCanBook.me, an online appointment-scheduling tool, to tackle the challenges of working with a large class. Specifically, this solution allowed us to balance a high volume of research consultations with other day-to-day duties while offering additional benefits to students. With the introduction of this scheduling tool into the embedded service model workflow, we observed significant improvements in efficiency and presented our initial findings in a poster at the 2016 Pennsylvania Library Association Annual Conference (Cole & Reiter, 2016). This article will describe our application of this scheduling tool, share outcomes, and suggest ideas on how this tool can be used in other applications and settings.

Pennsylvania Libraries: *Research & Practice*
Online Appointment-Scheduling for Optimizing a High Volume of Research Consultations

palrap.org

Background

The Schreyer Business Library has been working with the Management 301 course for over three years. As a part of the service model for this partnership, full-time librarians and staff as well as part-time student employees meet with students enrolled in Management 301. For clarity, we will use the term "research consultants" to refer to all of the librarians, staff, and students that contribute to this service.

The ongoing partnership involves research consultants being available at designated times for consultations with students enrolled in the course. Students may meet with research consultants at the service point in the atrium of the Business Building or in the Schreyer Business Library. Previously, in order to meet with a research consultant, no appointments were offered; rather, students could walk up to the designated service points. Overwhelmingly, the Business Building service point was most popular.

However, the popularity of the Business Building location presented challenges, such as long lines and wait times. In addition, each research consultation could last from five to 45 minutes. The lack of a time limit exacerbated the long lines and wait times. Based on comments received from students, research consultants learned that students were dissatisfied with having to wait in line for 30 minutes or more.

Additionally, the unpredictability of the walk-up service model made scheduling research consultants for the Business Building service point difficult. For example, there were anywhere from zero to 109 research consultations on a given day, and often, staffing did not align with demand. We tested several staffing approaches, such as assigning extra research consultants per shift and tracking student patterns to predict future staffing needs.

Ultimately, we wanted to continue the project, because of faculty buy-in and student impact, but needed a solution to improve the experience for students while improving our ability to staff the service. Prior research regarding the Schreyer Business Library and Management 301 course partnership suggested that a scheduling tool could improve our embedded service model for students and research consultants as well as accommodate high-volume scheduling needs (Reiter & Huffman, 2016).

Literature Review

Scheduling tools receive limited attention in the library literature, often focusing on those used by librarians for internal purposes, such as staff and meeting scheduling (Dworak, 2014; Michaelson, 2014; Wintermute, 2015). Michaelson provides an overview of scheduling software tools, including some that highlight patron-initiated features (e.g., D!BS from Evanced Solutions and rm.Insight from Library Insight) to book event and group study rooms. Patron-initiated tools allow users to book their own reservation without human interaction or cumbersome email exchanges. Literature on tools with patron-initiated features is growing with the development of new scheduling technology. In particular, how these tools help patrons book appointments with library personnel, and how they are becoming more widely adopted is often discussed.

For example, libraries now commonly use Springshare's LibCal, a multi-use tool to manage events, set library hours, and book appointments, spaces, and equipment (Springshare, 2017). Nelson (2016) provides an ample overview of the integration of LibCal with other Springshare products and its many features within the context of academic library use. Librarians at Berea College use LibCal to schedule information literacy workshops and one-on-one consultations with instruction librarians (Peach, 2016). Smith and O'Hagan (2014) discuss using LibCal for class registration, demonstrating its flexibility.

YouCanBook.me bills itself as "a simple online scheduling tool for your team" (YouCanBook.me Ltd., 2017). Although not a tool marketed exclusively to libraries, YouCanBook.me is a free or low-cost alternative to other scheduling software systems. Hess (2014) discusses how librarians at Oakland University adopted YouCanBook.me in

Pennsylvania Libraries: *Research & Practice*
Online Appointment-Scheduling for Optimizing a High Volume of Research Consultations

palrap.org

August 2013 to replace the now defunct Google Calendar Appointments to schedule research consultations. Stonebraker (2016) explicitly outlines using YouCanBook.me to "... manage patron interactions in an increasingly consulting-focused reference environment" (p. 335). Similarly, Lutz (2016) introduced YouCanBook.me as a solution to help streamline scheduling and alleviate the constant back-and-forth of email exchanges with students when arranging research consultations.

Price & Levitan (2015) discuss the increase in efficiency of scheduling with YouCanBook.me at their small liberal arts college but note issues, such as the need to develop workarounds to continue using the free version of the tool. Nielsen (2016) also highlights opportunities and challenges of YouCanBook.me, such as the need for flexibility and constant maintenance of one's calendar. Jones (2016) maintains a LibGuide that provides background on YouCanBook.me and different applications at her library, such as embedding a YouCanBook.me link into a single class and customizing booking forms. While the literature has demonstrated the rising popularity of YouCanBook.me in various library settings, the authors note the lack of in-depth studies on the tool and its application in a high-volume research consultation setting.

Pilot

In 2016, after reviewing the available tools, the research consultants piloted YouCanBook.me with the intent of streamlining the high volume of research consultations. We selected YouCanBook.me, because it allows research consultants to customize the length and time of appointments to match availability and allows students to make and cancel appointments independently.

Cost was an additional consideration when we researched potential scheduling tools. YouCanBook.me offers two account options. For a monthly fee, users are able to access additional features, such as creating multiple booking profiles, sending appointment reminder emails, customizing the look of the scheduler, and sending follow up emails. We elected to forgo the paid option because the free, basic features of the scheduling tool fit our needs.

To set up our profile in YouCanBook.me, we uploaded a photo of our service point and provided details relevant to booking a research consultation for the Management 301 class. We set our times of availability to be in the Business Building atrium Monday to Thursday from 1:30 p.m. to 4:30 p.m. The length and number of appointment slots are customizable in YouCanBook.me. We allotted 72 slots per day, each 20 minutes, and we adjusted the availability according to outside demands (e.g., days we could not occupy the space, days we had limited staff, etc.).

The students' assignment included the link and instructions to book their research consultation. Students selected an appointment time and filled out a customized form that included spaces to put their name and contact information. Once students made an appointment, they received a confirmation email with the details and cancellation instructions. We set our cancellation window to at least 12 hours before the appointment to ensure ample time to coordinate daily staffing schedules.

Research consultants monitored the appointment schedule and adjusted staffing accordingly. We reviewed the number of appointments each morning before going to the Business Building service point and determined how many staff members were required to meet the day's research consultation demand.

Outcomes and Discussion

In spring 2016, 1,600 students out of the 1,683 (95%) enrolled in Management 301 met with a research consultant for an initial visit. Students could meet with research consultants as often as needed, resulting in 252 return visits. In the semester, there were a total of 1,852 research consultations, of which 1,201 (65%) were scheduled via

Pennsylvania Libraries: *Research & Practice*
Online Appointment-Scheduling for Optimizing a High Volume of Research Consultations

palrap.org

YouCanBook.me. Walkups at either location accounted for the remaining 399 research consultations (35%). The data shows students' preference for making an appointment over dropping by, a trend that increased during fall 2016.

Fall is the lower-enrollment semester for Management 301. In fall 2016, 236 students out of the 257 enrolled (92%) met with a research consultant for an initial visit. Thirty return visits were recorded, resulting in a total of 266 research consultations during fall 2016. Of this total, 236 were scheduled via YouCanBook.me (89%), and 30 were walkups (11%). The notable increase from spring 2016 to fall 2016 in research consultations made by appointment encouraged us to continue using YouCanBook.me for the following semester. While we lack data to definitively explain the increase, we suspect that we promoted the tool more enthusiastically as we became more confident in its effectiveness.

In spring 2017, 1,456 students of the 1,559 (93%) enrolled in Management 301 met with a research consultant for an initial visit, and 143 came for a return visit. Of the total 1,599 research consultations, 1,397 (87%) were made via YouCanBook.me. The remaining 202 research consultations occurred without appointments (13%).

In fall 2016 and spring 2017, the vast majority of research consultations were scheduled via YouCanBook.me, suggesting that students were comfortable using the tool. Additionally, YouCanBook.me was used at a similar rate during fall 2016 and spring 2017, two semesters with significantly different enrollment figures, providing evidence of the scalability of the online scheduling tool.

Because many students scheduled appointments and arrived on time, they typically had little or no wait time. On most days, there were no lines; however, students who arrived early for their appointments may have had to wait in line while previous appointments concluded. If students arrived late, they may have had to wait, join another student already in consultation, or schedule an appointment for another time. When a 20-minute appointment was clearly not sufficient, research consultants encouraged students to make a return appointment.

Prior to the implementation of the scheduling tool, research consultants had to rely on previous data and predictive patterns to determine staffing needs for the Business Building consultation point (Reiter & Huffman, 2016). With the introduction of the scheduler and students' preference for booking appointments, the research consultants could use real-time data to accurately address staffing needs. Two full-time (non-student) research consultants were scheduled per shift at this service point, one primary and one backup. Part-time student employees' shifts were based on their class schedules and, therefore, relatively inflexible. If many appointments were scheduled, these two research consultants would go to the Business Building as planned and prepare themselves for a potentially fast-paced afternoon. Conversely, on days when fewer students booked appointments, research consultants could reduce staffing there, allowing the backup research consultant to attend to other duties, such as collection development, research, and other projects.

Overall, there was one primary drawback in using YouCanBook.me: missed confirmation emails. Although not prevalent, we noted several "no-shows," or students not keeping their appointment. We tracked the number of "no-shows" and found that 5% of appointments made were missed. After speaking with students, we discovered that sometimes confirmation emails were delivered to the spam or junk folder of students' email. This could explain the missed appointments or confusion about the particulars of the appointment. The paid version of YouCanBook.me includes appointment reminders, which may be a potential solution for the "no-show" problem; however, we determined this issue was not significant enough to warrant the cost of an upgrade. Instead, in collaboration with the course instructor, language to check spam or junk folders for the appointment confirmation email was added to the assignment and mentioned in class. Reasons for "no-shows" other than missed confirmation emails, of course, are beyond our control.

Pennsylvania Libraries: *Research & Practice*
Online Appointment-Scheduling for Optimizing a High Volume of Research Consultations

palrap.org

Other Applications

Applications for YouCanBook.me extend beyond our high-volume scheduling need. This tool has the potential to scale for use in a variety of library settings. Additionally, the tool is user-friendly and may be used at no cost, depending on the functionality required.

YouCanBook.me can facilitate scheduling for in-depth research consultations that require time and preparation. For example, in an academic library setting, the tool can scale to accommodate scheduling research consultations for individuals and teams in classes both large and small. Students may schedule appointments with librarians to consult on a project or multiple projects over the course of a semester. In a public or special library setting, YouCanBook.me may be used for detailed questions on topics like genealogy or business, which demand a great deal of time and focus from the librarian and the researcher.

Space scheduling is a struggle for librarians. YouCanBook.me may be a solution for booking rooms in libraries of all types. Librarians could make multiple YouCanBook.me profiles (a paid feature) for their highly sought-after spaces, such as group study rooms, meeting rooms, classrooms, and interview rooms. Patrons could easily check the availability of the spaces and make a reservation without the librarian acting as the intermediary. YouCanBook.me may also enable patrons to reserve time to use in-house library equipment, such as computers, 3D scanners and printers, and maker space resources. The wide range of possible applications shows the flexibility of this tool.

Conclusion

Based on the effectiveness of the online appointment scheduling tool and positive student feedback, we will continue to use YouCanBook.me in the Management 301 class. Students benefitted from minimal lines and wait times at the Business Building service point, while research consultants benefitted from the ability to efficiently and adaptively staff service locations. After three semesters of observation and heavy use, we were pleased the tool could more than handle our high-volume appointment booking needs and support our embedded service model.

We found that YouCanBook.me scales to function for classes of 257 to 1,683; however, more research is needed to determine how the tool performs for smaller classes and other library settings. Additional studies could investigate other applications of the tool in libraries, such as using it for reserving items or equipment time. Research on patron-initiated scheduling will become more necessary as the demand for these tools increases in libraries.

References

Cole, C., & Reiter, L. (2016, October). *Flexible, scalable, and free! Using an online scheduling tool to meet high reference demand* [poster]. Pennsylvania Library Association Annual Conference. Retrieved from scholarsphere.psu.edu/concern/generic_works/g79407z38z

Dworak, E. (2014). LibStaffer from Springshare. *The Charleston Advisor, 15*(3), 32-35. doi:10.5260/chara.15.3.32

Hess, A.N. (2014). Scheduling research consultations with YouCanBook.me: Low effort, high yield. *College & Research Libraries News, 75(*9), 510-513. doi:10.5860/crln.75.9.9197

Jones, A. (2016, January 18). *YouCanBook.me (YCBM): What the heck is it?* [LibGuide]. Retrieved from libguides.marybaldwin.edu/c.php?g=447675&p=3054639

Lutz, E.E. (2016). *Scheduling consultations using YouCanBook.me* [Power Point slides]. Retrieved from works.bepress.com/ellen_lutz/3

Pennsylvania Libraries: *Research & Practice*
Online Appointment-Scheduling for Optimizing a High Volume of Research Consultations

palrap.org

Michaelson, E. (2014). Scheduling software. *Library Journal, 139*(2), 36. Retrieved from
lj.libraryjournal.com/2014/02/technology/scheduling-software

Nielsen, J. (2016, June). *Booking the business librarian: Automating research consultation scheduling* [Power Point slides].
American Library Association Annual Conference and Exhibition.

Nelson, G.M. (2016). LibCal: A product review. *The Reference Librarian, 57*(1), 57-72. doi:10.1080/02763877.2015.1096226

Peach, A. (2016). Reimaging reference and instruction with LibCalendar. In Ryan L. Sittler & Aaron W. Dobbs (Eds.), *Innovative LibGuides applications* (pp. 131-144). Lanham, MD: Rowman & Littlefield.

Price, C., & Levitan. G. (2015). *Small libraries, big ideas: Using free online tools to enhance library services at a small liberal arts college* [Poster presentation handout]. SUNYLA Conference. Retrieved from
sunyla2015.files.wordpress.com/2015/03/glevitanyoucanbookmeguide.pdf

Reiter, L. & Huffman, J. (2016). Yes Virginia, it will scale: Using data to personalize high-volume reference interactions. *Journal of Academic Librarianship*, *42*(1), 21-26. doi:10.1016/j.acalib.2015.09.011

Smith, S.C., O'Hagan, E.C. (2014). Taking library instruction into the online environment: online health sciences library's experience. *Journal of the Medical Library Association, 102*(3), 196-200. doi:10.3163/1536-5050.102.3.010

Springshare. (2017). *LibCal*. Retrieved from www.springshare.com/libcal

Stonebraker, I. (2016). Special libraries and YouCanBook.me: Easy consultation scheduling through an online booking system. *Public Services Quarterly, 12*(4), 334-338. doi:10.1080/15228959.2016.1229148

Wintermute, H.E. (2015). Doodle; http://doodle.com/. *Technical Services Quarterly, 32(*3), 343-344.
doi:10.1080/07317131.2015.1032083

YouCanBook.me Ltd. (2017). *YouCanBook.me*. Retrieved from YouCanBook.me