KU Libraries

Connecting to KU Teaching & Research Departments

Task Force Report

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CONTENTS

FIGURES

1. INTRODUCTION

We live in an age of transitions. Many aspects of technology such as new hardware, storage capacity, and open access software development continue to grow exponentially and impact how humans communicate and live. Higher education and libraries are both affected as teaching and research evolve in ways that incorporate these new methods of sharing and using information. The KU Libraries *Connecting to KU Teaching and Research Departments Task Force* was charged with reviewing how we, as the KU Libraries, most effectively connect to the teaching and research enterprise at the University of Kansas and also to provide recommendations on steps we can take to enhance our connections to campus academic and research activities.

The Task Force views this report as the outcome of a short period of reflection on the objectives laid out in the charge (Appendix I). It is only an initial step within a larger discussion and planning process that must include all stakeholders. Ultimately, the future effectiveness of the KU Libraries as a strategic asset to the University of Kansas will depend on how well we adapt our services and resources to the evolving needs of our students and faculty.

2. REVIEW OF PERTINENT STUDIES

Several recent studies reveal important trends regarding faculty needs, attitudes, and expectations related to the services of research libraries and their own research, scholarship, and teaching. One of the more noteworthy is the Ithaka *Faculty Survey 2009*. Key findings of this report include trends that both the library building and the online library catalog are in continuous decline as the starting point for faculty research. Instead, general purpose search engines and specific electronic research resources are being used more as the starting points for faculty research (Fig. 1).[1] However, from our

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[1] Roger C. Schonfeld and Ross Housewright, *Faculty Survey 2009: Key Strategic Insights for Libraries, Publishers, and Societies* [report online]; available from http://www.ithaka.org/ithaka-s-r/research/faculty-surveys-2000-2009/faculty-survey-2009; Internet; accessed April 16, 2010.

local experience we know that KU Libraries as physical places are extremely important to undergraduates and have a great symbolic value to the University of Kansas. In regards to the general decline in library catalog use, we understand there are many
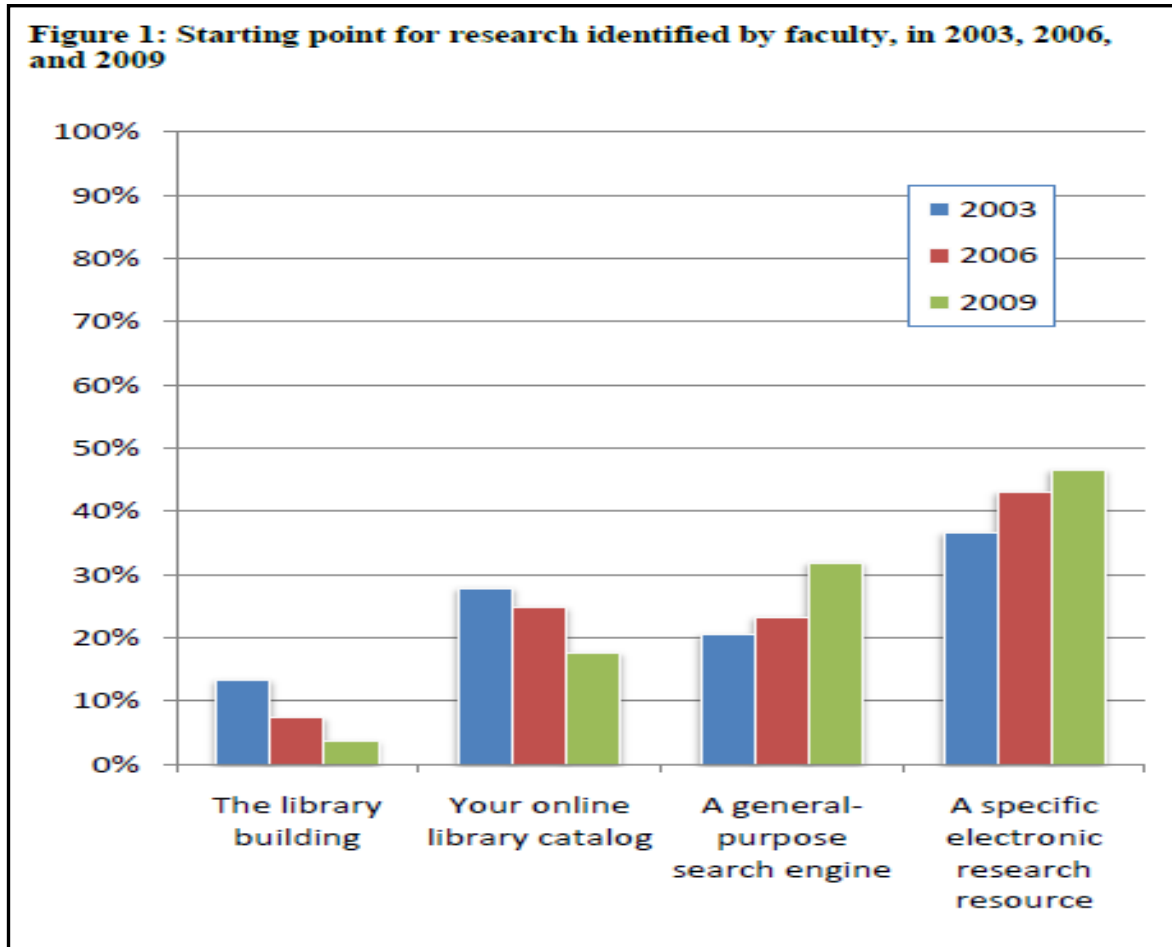
Figure 1: Starting point for research identified by faculty, in 2003, 2006, and 2009

Figure 1: Ithaka Faculty Survey 2009, pg. 5

other important functions of the KU Libraries' cataloging system beyond the gateway role. A number of the findings of the Ithaka faculty survey are consistent with general usage trends of the KU Libraries. For example, we also see a generally flat trend in the use of the library's online catalog but an increasing use of general and subject databases (Fig. 2). Both the dramatic and more modest increases in 2009 of the number of database sessions and visits to the catalog may be due to changes to the library website which made these resources more prominent, and extensive use of the link resolver. It will be important for the KU Libraries to watch these trends carefully over the next few years.
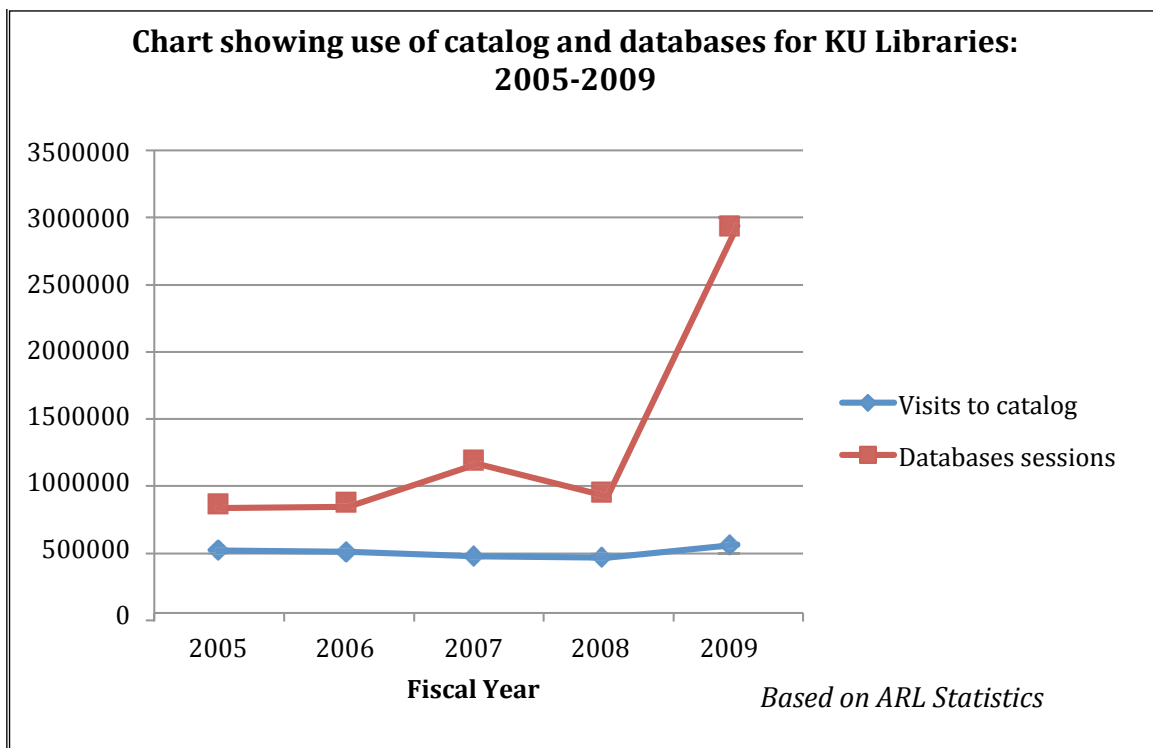
Chart showing use of catalog and databases for KU Libraries: 2005-2009

Based on ARL Statistics

Figure 2: Use of catalog and databases for KU Libraries: 2005-2009

Another pertinent group of trends revealed in the report measures faculty perception of the roles of the library. Notable here is the increasing (or continued) trend of identifying the importance of the library role as a buying agent for resources and the general decline in the perceived importance of the function of gateway (Fig. 3).[2] The decline in perceived role as gateway is true among faculty from all areas (humanities, social sciences, and sciences). Thus the authors of the study state "that libraries need to consider very carefully the investments they make in search and discovery services."[3] However, there are differences among faculty perceptions that are important. For example, a large majority of humanists place a higher value on several roles such as the archival and teaching support roles which are notably different than social scientists and scientists. These finding may be consistent with our experience (anecdotally at least) at KU. Future LibQual+, other surveys, or focus groups could potentially be used to investigate these aspects further.

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[2] Ibid., 9.
[3] Ibid., 12.

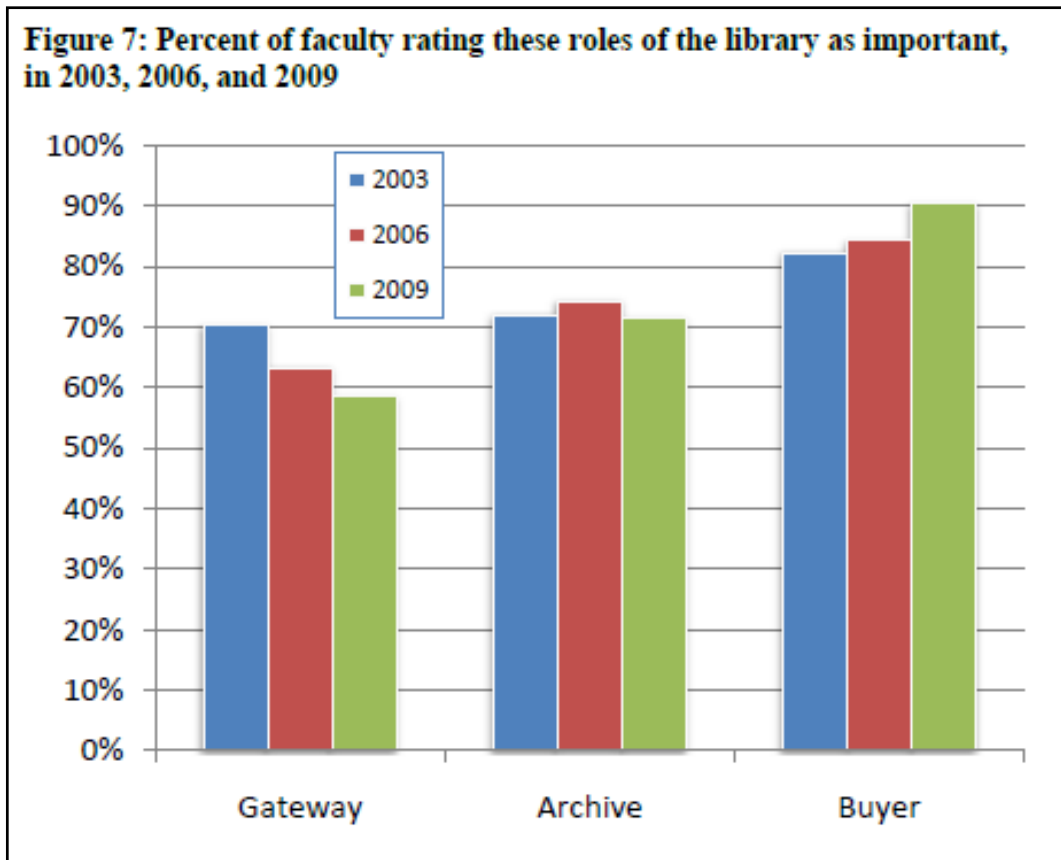**Figure 7: Percent of faculty rating these roles of the library as important, in 2003, 2006, and 2009**

Figure 3: Ithaka Faculty Survey 2009, pg. 9

Other information highly relevant to our Task Force was the series of articles published by ARL in *Research Library Issues no. 265-- A Special Issue on Liaison Librarian Roles.* In general, these articles tended to confirm the liaison model as the dominant outreach paradigm within research libraries while describing new techniques and strategies for broadening liaison librarian roles in order to deliver emerging services. This set of articles were directly related to Objective 2 of the Task Force charge. Particularly noteworthy was the model of the *Position Description Framework* of the University of Minnesota as explained in the article by Williams (Appendix II). The Task Force felt that this model offered great flexibility.[4] Another model noted is the "expert liaison" model under development at Oregon State University (Appendix III).

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[4] Karen Williams, "A Framework for Articulating New Library Roles." *Research Library Issues: A Bimonthly Report from ARL, CNI, and SPARC*, 265 (August 2009): 3–8. Retrieved from http://www.arl.org/resources/pubs/rli/archive/rli265.shtml

3. REVIEW OF MODELS

KU Libraries connects and partners with the KU community in many ways, both formal and informal. Similar to the description of the transitioning University of Minnesota Libraries, the KU Libraries have been transitioning from collection-centered service models (branch libraries and bibliographers) to engagement-centered models (subject liaisons and added services in research and learning such as digital initiatives and scholarly communications) (Fig. 4).

Transition from
"Collections-Centered" to "Engagement-Centered"
Service Model
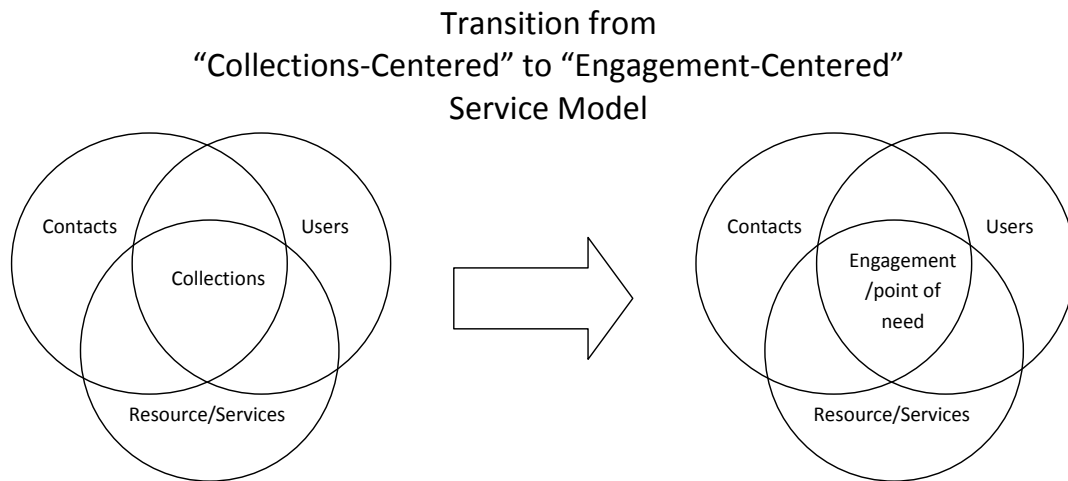
Figure 4: Service Model Transition

In many ways, we are currently sustaining multiple service delivery models which may continue to be desirable. The Task Force has deconstructed the various models from our readings and deliberations into a single list of ways that KU Libraries connects to the KU community (Appendix IV). While there are a wide variety of methods and services through which liaisons and others in the library communicate with and assist faculty, staff, and students, we have identified several gaps that warrant closer attention and potential improvement (see *Recommendations*). After reviewing the literature and summarizing the list of ways KU Libraries are currently connecting to and partnering with KU, three broad service models were identified:

- traditional department liaison

- embedded knowledge team - a team developed around functional support with an individual as the point of contact / face of the library
- resource team - groups working across lines to develop services and provide the "face" of the library

It is noted that these three models do not neatly define all ways we connect; however, they do represent three distinct service models that are used in combination with varying degrees of emphasis in other academic libraries. In each of these models, it should be recognized that library operations behind the scenes are "opaque" rather than "transparent" to the user. In addition, in applying these models, there is a need to balance the utility of contact person vs. a service contact.

The **"Traditional Departmental Liaison Model"** is a formal / structured assignment of one or more librarians to a specific department to meet three traditional roles: collections, reference, and instruction. On the library website, this is visible where specific people are listed as the point of contact on subject-specific pages or guides. There are several positive aspects to this service model which include: subject expertise; single point of contact; opportunities to develop strong working relationships with faculty; and the ability to adapt approaches to meet discipline-specific needs. The negatives evident in this service model lie in the fact that the model was developed and refined in a different higher education environment and may not be sustainable to support today's, and tomorrow's, emerging needs. For this model to remain viable, additional roles, beyond traditional ones, need to be added to meet user needs.

The **"Embedded Knowledge Model"** embodies a transition from the library-collection-centered model to the user-centered-service model. While there is no one standard definition, the understood assumption is that the main focus is meeting user information needs at the immediate point of need. The intent is to be engaged in the institution in roles that likely go beyond the traditional liaison to meet new demands created by the networked environment. The embedded model is evident in contexts not always directly controlled by the libraries, for example a virtual presence in Blackboard and IM reference; librarians as team members on grants, for instructional design, and

multidisciplinary committees; and a strong physical presence outside of the library, to name a few. One specific example of this is the **"Blended Librarian"** model which draws on librarians, faculty, instructional designers and technologists, and other academic support personnel working collaboratively to integrate the library into the teaching and learning process. This model is designed to encourage and enable academic librarians to evolve into a new role that blends existing library and information skills with those of instructional design and technology. Advantages of these models include the ability to build on the existing subject expertise and established relationships. On the other hand, the new skill sets needed to meet expanded roles (scholarly publishing, data management, open access and copyright advocacy, etc.) define the obstacles to adapting and implementing this model without other strong support structures.

The **"Resource Team" Model** has developed to meet expanding user demands, especially where expertise in specific subjects has been lost and/or the library has transitioned away from a liaison model. This is evident on the library website when the directory is sorted by functions instead of subject and the contact is a group email address or form for comments and questions. The University of Guelph Library's reorganization is representative of this model. This model recognizes the difficulty of expecting one person to meet the highly diverse needs of all faculty and students in a given department, and recognizes commonalities along service / functional lines instead of collections, with individual subject experts working behind the scenes to address user demands. One potential drawback in this model could be the perceived loss of the "human face" of the library.

KU Libraries currently delivers services along a continuum of multiple models and methods, including some not noted above (Appendix IV), and each approach has advantages worth preserving. It should be noted that transitioning to new models does not preclude retaining those advantages that serve faculty and student needs, even though specific methods may change over time.

4. THE NEED FOR FURTHER FORMAL ASSESSMENT

For the purposes of this initial review, and given the short time frame and summer season, the Task Force thought it most appropriate to focus on data already at hand. KU Libraries should continue to carefully evaluate the descriptive statistics and survey results that the library already collects (e.g. catalog and database use mentioned earlier). Furthermore, we may need to more closely analyze trends on campus in terms of enrollment, hiring, and other factors. The KU Libraries may wish to conduct an additional survey or a series of focus groups to gage faculty and student perceptions more in-depth. However, these instruments need to be carefully formulated in order to prevent false conclusions.

In reviewing the ARL statistics for KU Libraries we can see a number of trends that can be interpreted different ways. For example, if we look at instruction, we see a general increase in the number of participants and the number of sessions (Fig. 5). However,
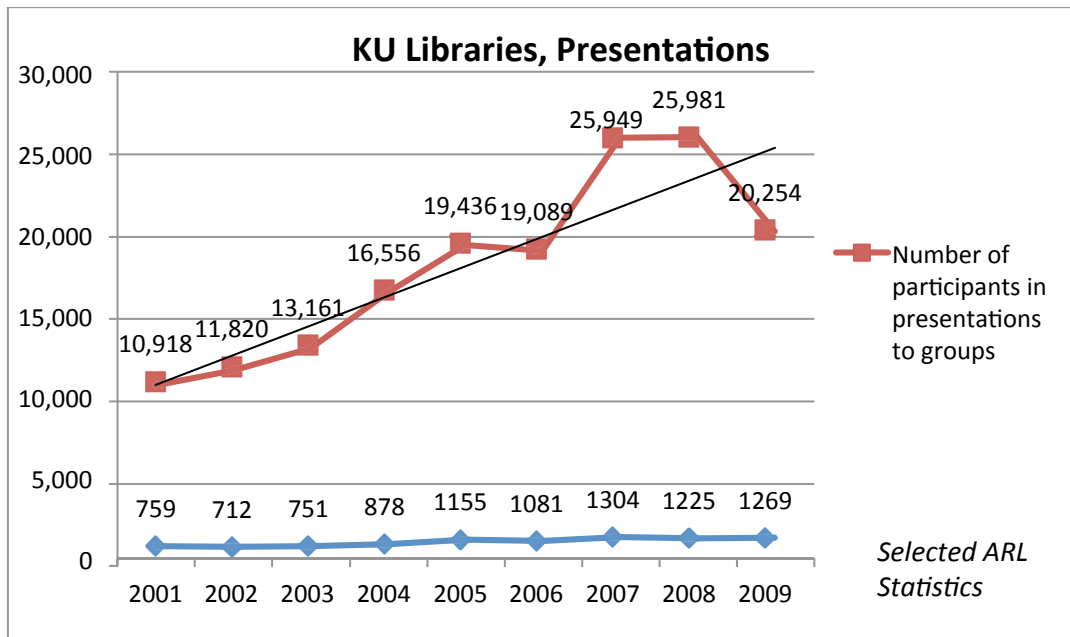

Figure 5: Number of instruction sessions and participants for KU Libraries, 2001-2009

we also see years of dramatic increase (2007 - 2008) followed by a dramatic decrease in 2009 which may warrant additional investigation.

If we also look at metrics for other traditional services such as reference and circulation, we see periods of decline followed by periods where the numbers seem to level off or even increase (Fig. 6).

KU Libraries - Transactions
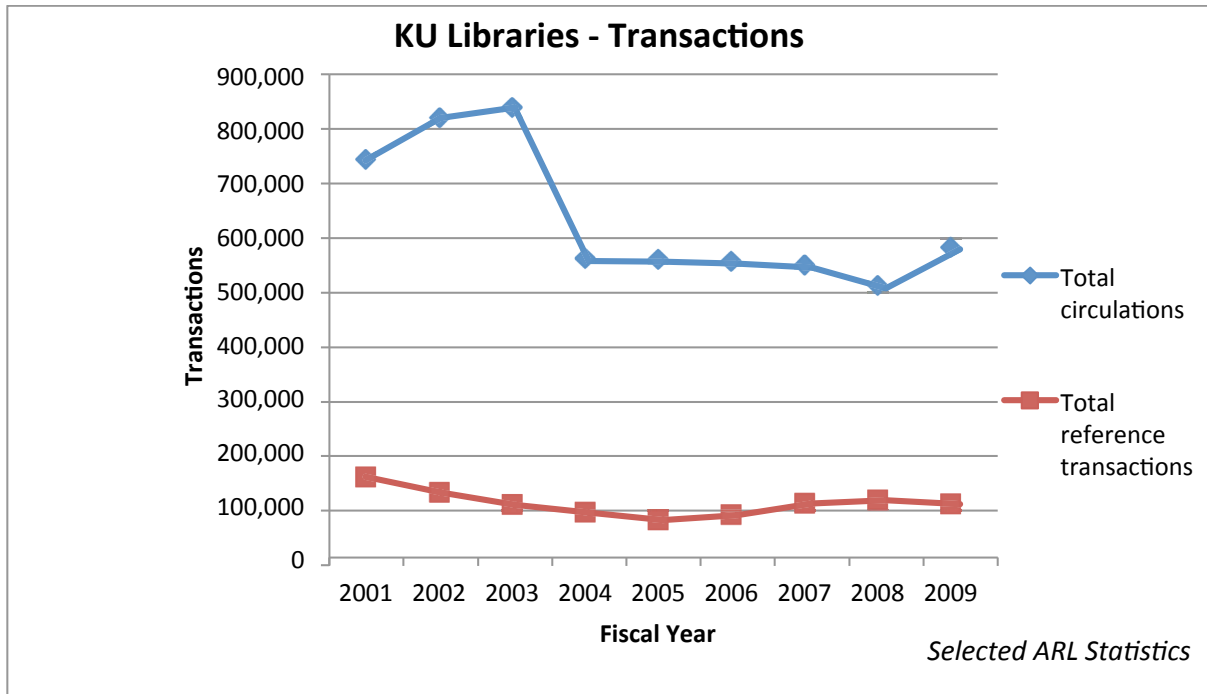
Figure 6: Number of circulation and reference transactions for KU Libraries, 2001-2009

The recent increase in circulation may be linked to the increase in catalog sessions. The increases in reference questions for 2005-2008, that reverses the trend of decreasing reference questions (2001-2005), are likely a result of developments in digital reference services. In the age of the web, it is probable that the numbers will never again reach 2001 levels in circulation or reference. However, these are still huge quantities of transactions with any given transaction capable of making a lasting impact on the educational experience and success of any given student or faculty member.

5. COMPETENCIES REQUIRED

The Task Force tried to define and then deconstruct the fourth objective in our charge. One definition suggests that "competencies are the measurable or observable knowledge, skills, abilities, and behaviors (KSABs) critical to successful job performance."[5] Many other institutions around the country are discussing competencies that may be desirable for librarians. See, for example, the *Competencies for California Librarians in the 21st Century*, which were developed in 1997 and remain relevant today (http://www.cla-net.org/resources/articles/r_competencies.php). With this in mind, we propose the following (not in order of importance):

Knowledge of Scholarly Communication issues and trends, including:

- Broad understanding of copyright
- Knowledge of Open Access
- Knowledge of scholarly publishing structures, both broadly and in your area of responsibility
- Knowledge of issues about archival preservation

Teaching abilities/knowledge of instructional trends, including:

- Instructional design abilities
- Knowledge of Information Literacy (IL) concepts and standards
- Curriculum integration of IL concepts
- Pedagogical knowledge as applied both broadly and to your area of responsibility
- Teaching trends both broadly and in your area of responsibility

Knowledge of data resources and services, including

- Metadata knowledge
- Data literacy
- Data preservation
- Digital manipulation/management/e-publishing

Knowledge of Assessment, including

- Ability to participate in assessment of work both broadly and in your area of responsibility

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[5] Source: http://www.dop.wa.gov/strategichr/workforceplanning/competencies/pages/default.aspx

Possession of technological fluency skills, including

- Ability to generally interact successfully with internal (i.e., KU Libraries) and external faculty, staff, and students in engaging with technological tools
- Skill in fielding general technology-related questions

Ability to offer marketing/outreach to faculty and users, including

- Promotion of resources
- Promotion of services beyond IL and Collection Development
- Services to distance education consumers (i.e., meaning those not physically on campus)
- Knowledge of research trends in your area of responsibility

Other important competencies include:

- Project management
- Ability to clearly communicate
- Teambuilding and collaboration skills
- Open to continual learning
- Flexibility

6. RECOMMENDATIONS AND NEXT STEPS

Recommendations:

- Review service gaps for potential improvements.
  - **Knowledge of Scholarly Communication Issues & Trends:**
    - Develop a better understanding, and emphasis on, the **process of scholarship** rather than the products of scholarship
    - Increase focus and **services for interdisciplinary work** of faculty and students; team approaches to services. Examine / modify the traditional subject fund structure to better accommodate new areas of cross-departmental and interdisciplinary subjects.
    - Partner on **grant proposals and joint research projects with faculty**
    - Support emerging **grant funding for open access mandates**

- – Encourage **scholarly interactions** via the creation / hosting of research salons for faculty and graduate students to participate in, share research, etc.
- – Improve our service profile for **copyright services**.

o **Instruction and Reference:**
  - – Develop **innovative research and teaching partnerships**:
    - ▪ Encourage new approaches for interacting with users, collaborating with academic groups and embedding staff and services in **users' workflows**.
    - ▪ Library Instructors should become more involved in **course planning** and seek opportunities to explore and to **integrate library resources** into semester long courses.
    - ▪ Establish open **research forums** in the Libraries for faculty, staff, and students to talk about their research projects and findings. Invite users to discuss their research and collection use/needs.
  - – Improve **administrative research services.**
  - – Re-think how **repetitive information or conceptual information** is provided on the Libraries' website or service points.
  - – Consider how **participation in reference** might be expanded.

o **Knowledge of Data / Collections Resources and Services:**
  - – Create **credible and valuable data services and applications** including repository standards; consultation / instruction with faculty on data management, planning, and best practices; and participation in data gathering at the disciplinary level for data curation purposes.
  - – Provide additional staffing and an improved service profile for **data services**.
  - – Develop improved, more robust **digital preservation services** including a revised preservation plan, standards for information

creation, library policies, and consultation with users on issues, models, and approaches.

- Increase focus on **non-traditional methods** of collection development, e.g. purchase on demand, grey literature collections, new media collections, creation of digital collections, etc. Consider an increased focus on policies, staff training, etc.

- Maintain a **balance** between digital and print collections that meets the needs of our various user communities.

- Improve **integrated access** to local collections as well as external collections.

- Digital content, discovery tools, and user services should be compatible with multi-language character encoding to ensure scholarly resources and services meet the **needs of a diverse user community**.

o **Knowledge of Assessment / Management Data:**

- Create and maintain an accurate **internal data warehouse / repository** for internally-generated library assessment and statistical information, including identification of longitudinally significant data for assessment

- Work with the University (OIRP) to gather and make **accessible better data on interdisciplinary efforts** at the University.

- Measure the success of the library service by the **outcomes of research and teaching** of our users.

o **Technology and Technological Fluency Skills:**

- **Improve awareness** among librarians and staff of appropriate use for, and capabilities of, the Libraries' systems. Include technical staff in discussions with users whenever appropriate.

- Accommodate **multiple language character encoding** in all external aspects of technology, i.e. library catalog, website, etc.

- **Improve staffing** for technology support.

- o **Marketing / Outreach:**
    - **Align** the Libraries' collections, services, facilities, etc. **with University priorities** of excellence in research, teaching, and internationalization.
    - **Increase visibility** in the departments using methods such as posted flyers, information on websites, contact information, and LibGuide URLs in faculty syllabi, departmental newsletters, library news updates, a Library Help button in each Blackboard course, videos on library services, an annual or semester video greeting (via email) from the Dean, etc.
    - Improve the delivery of **Faculty Services information** on the library website. Potential approaches might include information such as a written and/or video greeting from the Dean, an explanation of the philosophy and approaches the Libraries use to work with faculty, one faculty service contact person (to get faculty started) instead of / in addition to the list of subject specialists, and a feedback section for faculty concerns/requests.
    - Improve ways to **capture and communicate points of expertise**, for both subjects and services, so that everyone internally has an easy way to determine the best point of contact for more in-depth service needs, e.g. an internal Service Catalog.
    - Improve methods of **sharing our successes** internally.
- o **Staff / Space:**
    - Provide improved **collaboration space** for staff to facilitate consultations, internal communications, and improved services awareness.
    - Provide additional opportunities for **targeted staff development and training**.
    - Conduct periodic **review of liaison assignments & models** for effectiveness, service coverage, etc.

- Continue to **improve library spaces and facilities** to meet user needs.

- Have each unit determine which aspects of traditional activities and services (reference, instruction, and collection development) can be proportionally decreased or eliminated.

- Determine which new proficiencies (data services, scholarly communications, and digital initiatives) KU liaison librarians will need on a case-by-case basis. Develop core competencies based on these proficiencies for all library positions.

- Develop and utilize a tool such as Minnesota's *Position Description Framework* to review KU liaison librarians and other professional staff statements of responsibilities.

- Develop a long-term program of assessment of KU faculty needs and expectations that is based on a coordinated approach across the Libraries to gain maximum value from results and minimize "assessment fatigue" among users.

- As a technique to connect to new faculty, create a "Take a New Faculty to Lunch Program" (see: https://wiki.lib.umn.edu/AP/TakingNewFacultyToLunch)

- Designate specialized skills (ex. server administration, web development, web design, etc.) and basic reference positions as "service to all." For example, basic library instruction could be conducted by half-time TA positions, or be "contracted out" for staff dedicated to these courses.

- Recognize that staff in some areas of the library need subject expertise at an advanced level. Subject expertise can align librarians with teaching faculty.

- Professional Development / Training:
  o Allocate training dollars to meet the need for new proficiencies
  o Ensure that each liaison establishes and fulfills at least one professional development goal each year as part of the goal setting process.
  o Identify skills gaps between core competencies and develop plans to close them
  o Establish data services, scholarly communication, digital initiatives, and IT training and development programs.

Next Steps:

- Meet with various groups, both internal and external to the Libraries, to present the Task Force report, especially the different models, gather input on needs, and discuss potential changes:
    - Present initial Task Force report to the University Senate Libraries Committee
    - Develop and conduct a targeted survey or series of focus groups of users (teaching faculty, staff, and students) to gather input on needs and potential changes
    - Hold meetings and discussions with subject councils and other service departments within the libraries
- Conduct a scenario planning exercise
- Charge a small group to work with the Officer for Grants, Research Support and Assessment on centralizing statistical and qualitative data for library assessment; identify trends and metrics for strategic planning.

APPENDIX I: Task Force Charge and Members

June 2010

Connecting to KU Teaching and Research Departments

Working Group Charge

In this time of deep and fast-paced change in the service profile of KU Libraries and more generally in higher education, we need to look both internally and externally at our organization and consider how we connect to the research and teaching enterprises as well as to our non-academic partners. Traditionally, we have connected our services to academic departments through a subject librarian model with a focus on three primary services: building collections, providing instruction, offering consultation.

Significant new programs such as the Center for Digital Scholarship, our new partnerships as reflected in initiatives such as the Anschutz Learning Studio, and our growing ties to the university through our investments in areas such as digital humanities, scholarly communication, the merging needs of cultural heritage organizations (museums, archives, and libraries), and a widening body of literacies and competencies required of students, calls us to examine and reconsider how we most effectively connect as a library to the teaching and the research enterprise at KU as partners and integral service providers.

This group will report its findings and recommendations to the Dean's Executive council which includes the Dean of Libraries, the Assistant and Associate Deans, and the Head of Spencer Libraries.

The "Connecting" working group will undertake the following objectives over the summer and provide a high-level set of recommendations by August 31, 2010. We will also ask the group to meet with the Dean's Executive committee several times over the course of the summer to touch base and discuss issues, concerns, or directions as needed to move forward.

1. ***Review recent and pertinent studies on faculty needs, attitudes, and expectations*** with respect to the research, scholarship and teaching. This does not need to be a comprehensive review, but should focus on recent studies by mainstream entities that study higher education. Examples include:
    • the Mellon-funded study by The Center for Studies in Higher Education, "Assessing the Future Landscape of Scholarly Communication" and related article from same authors, "

- the ITHAKA 2009 Faculty Survey and a previous article by the authors, "The Changing Information Services Needs of Faculty." *EDUCAUSE Review*, vol. 42, no. 4 (July/August 2007): 8–9
- the 2009 ARL report, "A Special Issue on Liaison Library Roles"

2. ***Review the multiple models by which we as KU Libraries are connecting to and partnering with KU departments*** and their respective faculty, staff, and students, recognizing that a growing number of important contacts do not happen through our traditional subject librarian role.

3. ***Consider and provide recommendations on the need for further formal assessment of KU faculty needs and expectations*** given the local data currently available in the collection development reports, research and teaching stats, and through LibQUAL and other recent surveys.

4. ***Consider and report on the current library staff competencies required*** to meet the needs of KU faculty, staff, and students and the emerging roles we may assume for KU in the next 5 years.

5. ***Provide the sponsors with a set of written recommendations*** along with shared dialog on new directions or enhancement of our current departmental academic and research connections that can meet a broad set of library services and help us to work together as librarians and library staff more effectively.

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APPENDIX II: University of Minnesota Libraries Academic Programs Division Librarian Position Description Framework Summer 2009

Introduction to the Framework

In 2009 the U of M Libraries won the ACRL Excellence in Academic Libraries Award with an application entitled *The University of Minnesota Libraries: Changing the Paradigm.* The following excerpts from that application provide an excellent summary of the path we have been on since the Academic Programs Division restructured and created the first Position Description Framework in 2006.

"In the last decade, new technologies have fueled fundamental shifts in the behavior and expectations of students and faculty. Digital content abounds and new forms of information access are evolving, giving rise to changes in the ways scholars communicate and disseminate their research. Libraries, traditionally focused on the products of scholarship, are now prompted to understand and support the processes of scholarship. The University of Minnesota Libraries have been a player in this paradigm shift, and are deeply engaged in the teaching, learning, and research processes."

"Over the past several years, themes of engagement, of "getting in the flow of users," whether in virtual or physical contexts, have shaped the University of Minnesota Libraries' planning and activity. During this time, a shift in our vision and mission statements reflects the changing paradigm. Our current mission affirms that the library is no longer the center of the information universe; rather, its strategic advantage comes from a broader portfolio of assets: our expertise and value-added services have become paramount. The University Libraries have two roles: as leader in areas such as information literacy, copyright, and authors' rights and as provider of extraordinary information experiences — that is, engaging fundamentally in the lives of students, scholars, and citizens to improve individual productivity and the achievement of their goals."

"Moving from a collection-centered model to an engagement-centered one does not happen overnight. Over several years, we have transformed the University Libraries' roles and reconceived essential infrastructure to support those roles."

Many of the new roles described above were integrated into librarian position descriptions in 2006 and we have made great progress in some areas. Positions descriptions are living documents that will be updated as needed to reflect new insights and changes in our environment.

As always, clear and current position descriptions, along with division and department goals, will help individuals write annual personal goals. Using the framework, directors and individuals will easily be able to create and update position descriptions. The framework is intended to help articulate both ongoing and new roles and responsibilities. This is why examples are included in a number of areas. The examples are illustrative, but not exclusive.

The Framework includes most significant work performed by librarians and reflects the critical roles we need to fulfill, but not every individual will do everything in the framework. Position descriptions will be designed in consultation with individuals; department directors have responsibility for the final document. As we expand into new roles, departments are encouraged to view the work as belonging to the department. In some cases, all individuals will still engage in the same work; in other cases, a department might choose to vest the lead role or most of the work in a particular arena with one or a few individuals who have particular skills or interest in that area. Departments should also keep in mind that in certain areas we have developed positions with expertise intended to serve as consultants across the division. Examples of this include the Information Literacy Coordinator, the Grants Coordinator, and the Media Outreach and Learning Spaces Librarian.

Campus Engagement
- Actively engage with faculty, students, and staff in assigned areas, developing strong working relationships.
- Promote current services and collections.
- Be knowledgeable about and be able speak to a range of library issues, including scholarly communication, the emerging digital conservancy, the development of new online tools, and the integration of information literacy skills into the curriculum.
- Assess user needs to develop and maintain relevant, high-quality services and collections.
- Analyze trends in departmental teaching and research programs, stay abreast of scholarship in the disciplines themselves, and use this knowledge to respond to departmental needs.
- Seek opportunities to collaborate and establish partnerships with departments, including the creation of digital content and services. Examples include:
    - o Collaborating with data producers and repository contributors to develop cost-effective and efficient strategies for managing data and information.
    - o Seeking opportunities to partner with researchers in projects or grants that require intense information and data management.
- Examples of good interaction include:
    - o Engaging in individual conversations, especially as we increase the amount of time we spend outside the Libraries, in departments, research centers, and areas in which students gather.
    - o Seeking participation in departmental, college and campus committees.
    - o Attending and presenting at departmental meetings, seminars, and colloquia

- o Forming and working with library advisory committees.

Content / Collections (Acquisition, Stewardship, Promotion)
Build and manage library collections in the subject areas of XXX:
- Systematically select material in all formats (print, manuscripts, digital, data sets, fixed and streaming multimedia), to serve the current and future research, teaching, and learning needs of University of Minnesota clientele.
- Explore new and collaborative approaches to collection development and management, considering new discovery and delivery mechanisms, constraints on physical space, and the need to ensure sustainable access to print and digital collections.
- Build on collections of distinction that may also serve regional, national and international users.
- Discover and recruit institutional scholarly output, research data and other content for inclusion in the University Libraries' digital initiatives.
- Manage collection funds efficiently, effectively and in a timely manner.
- Strategically assess and make decisions regarding the acquisition, retention and preservation of collections.
- Consult proactively with technical and access services staff on appropriate arrangement, description, cataloging and provision of access to traditional collections and electronic resources.
- Develop and maintain relationships with dealers and donors (of both in-kind and monetary gifts).

Teaching and Learning
- Actively engage with faculty and graduate teaching assistants as partners in programmatically integrating information literacy concepts and skills into the curriculum.
- Using sound instructional design practice, develop learning materials and instructional sessions in a variety of formats that teach students to:
  - o recognize information needs, create successful search strategies, and evaluate and effectively use information resources in all formats, including archival and other primary materials as well as secondary sources.
  - o understand the research and scholarly communication patterns of their chosen disciplines.
  - o understand the economic, social, and legal issues around the use of and access to information.
- Deliver effective instructional sessions as appropriate. Determine when it is more appropriate to have students use online tools; or to give learning materials to faculty and teaching assistants for their incorporation into class sessions.
- Conduct needs assessment as appropriate and selectively measure instructional outcomes in order to ensure effectiveness of instructional initiatives.
- Maintain an up-to-date knowledge of relevant University and department curriculum initiatives, in order to keep information literacy program consistent with University curriculum.
- Develop and manage physical and/or online learning spaces.

Scholarly Communication
- Educate and inform faculty, students, and campus administrators about scholarly communication issues. Examples include:
  - Helping faculty and graduate students to understand their rights as authors
  - Contributing content to copyright and/or scholarly communication web sites
  - Copyright
- Advocate for sustainable models of scholarly communication.
- Work closely with faculty and students to understand their changing workflows and patterns of scholarly communication; assist in the development and creation of tools and services to facilitate scholarly communication.
- Support and promote the University Digital Conservancy by
  - Helping administrators, faculty, and students understand the role of the UDC in building and preserving digital collections.
  - Working with faculty and departments to promote the UDC as a scholarly communication tool.
  - Assisting in content recruitment; Identifying digital resources that require long-term preservation and merit sustained access.
  - Helping to shape the infrastructure in which digital preservation and access can successfully evolve.

E-Scholarship and Digital Tools
- Identify areas where new online learning and digital tools can place the Libraries into the flow of teaching, learning and research.
- Collaborate in the design, implementation, and maintenance of online tools and services that meet the needs of discipline/interdisciplinary research communities.
- Actively participate in the coordination and integration of online tools in support of teaching, learning and research.
- Develop knowledge of current practice and future directions in e-scholarship and help to identify gaps in existing support.
- Participate in defining library roles in e-scholarship.

"Ask Us" Services
- Actively seek opportunities to provide <u>customized or expert</u> reference and research services, typically by appointment or referral, which include:
  - providing consultations that involve subject or other specialized areas of expertise (e.g., in-depth knowledge of copyright or scholarly communication issues or specific collections).
  - answering referred questions in all formats (chat, email, phone, desk/in-person) and individual / group consultations.
  - applying knowledge of how research is conducted in certain disciplines.
  - extending services such as mobile librarian activities, administrative research service, blog creation in partnership with departments, morning report type activities, etc.

- Provide high quality reference and research support <u>on demand</u>, typically at a walk-in desk, on email, or chat, by:
  - o Providing assistance and one-to-one instruction in finding and evaluating information.
  - o Providing assistance in accessing library resources and services.
  - o Providing feedback about user success with resources and services.
  - o Providing support in using information effectively in all formats.
  - o Documenting and analyzing data on reference transactions, both at service points and for customized reference transactions.

Outreach
Contribute to the University of Minnesota's commitment to serve the citizens of
  Minnesota. Examples include:
- Seeking speaking engagements and other opportunities to address community groups to inform them of resources available to them.
- Seeking opportunities to address local, regional, and state government agencies, to foster better communication and understanding of each other's programs and services
- Pursuing partnerships with other organizations (e.g., libraries, library organizations, business community, etc.).
- Developing, maintaining and promoting services and resources that will benefit the broader community.

Fund Raising
- Identify potential projects / activities for grant funds; assist in the preparation of grant proposals. If appropriate, serve as principal investigator for a grant.
- Identify potential donors and work with the Libraries Development Office to cultivate donors as appropriate. Meet with existing donors to develop relationships.

Exhibit and Event Planning (Not all librarians will engage in this every year)
- Identify potential topics for exhibits or events that promote services or collections or support campus goals; share with appropriate planning bodies (Exhibits Committee, First Fridays Planning Committee, Events Planning Committee, etc.)
- Prepare exhibit content and mount exhibits.
- Plan and execute events.
- Work closely with Communication Office on publicity for exhibits and events.

Leadership
- Contribute to the goals and strategic initiatives of the Libraries through active participation in collaboratives, working groups and task forces.
- Manage projects and develop programs as assigned in consultation with sponsors, supervisors and other stakeholders.
- Share expertise with colleagues and administrators to further Libraries and University goals and strategic initiatives (leading from where you are within the organization).

- Facilitate successful group processes including meeting management, conflict resolution, and consensus building.

Management and Supervision (where applicable)
- Coordinate overall operational activities of [name of unit or library]; facilitating relationships with other groups in the Libraries, evaluating needs and processes, addressing staffing requirements, physical plant needs, and the implementation of policies and procedures.
- Provide direct supervision of [positions]. In consultation with department director write position descriptions, hire, assign job responsibilities, coach and mentor, conduct performance evaluations, and facilitate staff development and training opportunities.
- Prepare narrative and statistical reports for [name of unit or library] and prepare additional documentation on activities and progress as required. Prepare recommendations and proposals for long range projections in terms of staffing, space and equipment, and collection facility needs.

Related Documents (available through AP Wiki):

Professional Expectations
Criteria for Continuous Appointment

APPENDIX III: Oregon State University Expert Liaison Model

From: Boock, Michael [mailto:Michael.Boock@oregonstate.edu]
      Sent: Tuesday, August 24, 2010 11:31 AM
      To: Ghouse, Nikhat J
      Cc: Nutefall, Jennifer; Ludwig, Deborah
      Subject: Library reorg

Hi Nikhat,

I'm moving this thread from Facebook to email so that I can copy Jennifer Nutefall, our AUL for Innovative and User Services. Jennifer would be happy to answer any follow up questions you have about the realignment. I've attached an email that Jennifer sent to our library staff that summarizes the realignment along with some other documentation that was included as attachments to that email.

As far as the transition from a subject liaison model to an "expert liaison" model, it is still in the discussion stage. In our realignment discussions we recognized that our research and teaching faculty increasingly have information related needs that are unrelated, or secondary, to their discipline. For example, faculty who have questions about copyright may be better served by contacting a copyright expert than contacting an Anthropology subject librarian/bibliographer. We are moving to a purchase on demand model for an increasing percentage of our firm orders. Our subject librarians are spending less and less time on collections and more time talking to faculty about, for example, instructional design relating to information, data curation, author's rights, open access, metadata, digital publishing, digital repositories and collections. As we continue to move in these new directions it will be important for our subject librarians, who don't sit at the reference desk either, to build expertise in one or more of these areas. I'm not sure yet how all this will work out but we're excited about the possibilities. One of our new departments, Teaching and Engagement, will be responsible for "outreach activities" and facilitating access to functional experts throughout the library. That department will report to Jennifer. She may have a different take on this; as I said, we've just begun conversations about what this could look like.

Best,
Michael

On 8/16/10 10:04 AM, "Nutefall, Jennifer" <Jennifer.Nutefall@oregonstate.edu> wrote:

> To all Library faculty and staff,
>
> As you know for the last several months library administration and LAMP has been working on strategically realigning our departments for the future. We have now finished the realignment process and over the next month we will be working on implementing the new structure. As a result of the realignment there are three new departments.
>
> 1.   The **Teaching and Engagement Department** will focus on our instruction and information literacy program as well as our outreach to the community.
>
> 2.   The creation of the **Collections and Resource Sharing Department** combines collection development, acquisitions, interlibrary loan, and circulation/collection maintenance into one area to ensure that our users have the information they need for learning, teaching and research.
>
> 3.   The **Center for Digital Scholarship and Services** which is dedicated to the organization, delivery, management, and preservation of digital and print resources for scholars and students at OSU.
>
> Attached is the final realignment document which provides the full department descriptions for all of the library departments as well as a listing of faculty and staff in those areas. Also attached are the new organizational charts.
>
> <<Library_Realignment_Final.docx>> <<OrgChart - OSU Libraries Realignment.pptx>>
>
> This realignment will allow the OSU Libraries to continue to move forward and we appreciate all the input we've received as we shape these new areas.
>
> Thank you
>
> Jennifer
>
>
> Jennifer Nutefall
> Associate University Librarian for Innovative User Services
> Oregon State University
> 121 The Valley Library
> Corvallis, OR 97331
> Phone: 541-737-8527
> Fax: 541-737-3453

[The OSU realignment report and organization chart are available through the Task Force on request.]

APPENDIX IV: Models & Methods

Objective #2: Review the multiple models by which we as KU Libraries are connecting to and partnering with KU departments *and their respective faculty, staff, and students, recognizing that a growing number of important contacts do not happen through our traditional subject librarian role.*

- KU Community includes:
    - Faculty
    - Instructors
    - Students
    - Administrators
    - Other campus units (i.e. Dole Institute, department libraries, etc.)
- KU Community interacts with us via:
    - In the Library – at the service desk, reference desk, one-on-one appointments
    - In the Library – webpage feedback options: "comments" form, suggest a purchase, web retriever,
    - Library Functions/Events – tours, class instruction, speaker events, exhibits,
    - Reference Assistance – in person, email, IM, etc.
    - Technical processing assistance (cataloging for Dole Institute, ordering books, binding thesis questions, ILL requests, etc.)
    - Formal events – Campus events (teaching summit, Chancellors Holiday Party,); community events
    - Information events – parties, run into at…,
    - Communicate with KU Community about:
        - Resources available
        - Reference/research questions
- KU Community finds us via:
    - Webpage directories internal to KU Libraries, example: Subject Librarians List http://www.lib.ku.edu/infogateway/index.cfm?rtype=subject&page=allContacts
    - Webpage directories external to KU Libraries
    - Webpage directories internal to KU Libraries
    - Public address messages, example will be an FDLP produced public services announcement on KJHK that Rebecca is arranging
    - Referrals from other colleagues from the library and the campus community
    - LibGuides
    - KU Online Catalog
    - Databases
    - Department Webpage

Models & methods by which librarians and staff connect with faculty and students:
- **Formal department / school assignments**
    - Connect with faculty and students intellectually and socially
    - Serve as teacher/consultant/advisor/partner
    - Serve on department committees

- o Email faculty and TAs at the start of the semester
- o Remain in frequent contact via email
- o Attend departmental events (annual/monthly faculty/advisory meetings, festivals, brown bags, etc.)
- o Use departmental listservs, when available
- o Build relationships with the department's administrative assistants, undergraduate advisors, graduate advisors
- o Apply knowledge of how research is conducted in specific disciplines
- o Draw and build on actions from a variety of other models.

- **General Communications**:
  - o Strong relationship-building with individuals, departments – engagement; collaboration (Williams)[6]
  - o Coordinate service delivery (Gabridge)
  - o Accreditation process planning and support (Dupuis)
  - o Conduct environmental scans (Kirchner)
  - o Act as middleware (Whatley)
  - o Email faculty and TAs at the start of the semester
  - o Remain in frequent contact via e-mail
  - o Attend departmental events
  - o Sparingly using departmental listservs (for those lucky enough to have access)
  - o Build relationships with administrative assistants, undergraduate advisors, graduate advisors
  - o Connect with faculty and students intellectually and socially through different communication channels: listserv, annual faculty meetings, monthly advisory meetings, annual open house, annual festivals, social events, outreach events, weekly brown bag talks, social media, etc.
  - o Be proactive in information sharing: inform individual faculty, individual users, and groups of users on new trends and information related to fields of study.

- **Collections Development**:
  - o Recruit content for the institutional repository (i.e. KU Scholarworks), including datasets (Williams, Gabridge)
  - o Apply knowledge of how research is conducted in specific disciplines (Williams)
  - o Use non-traditional methods of collection development, e.g. purchase on demand, grey literature, new media etc. (Whatley)
  - o Send notices when books you think faculty might be interested in are purchased — offer to place on hold for them
  - o Seek opinions/advice about acquiring resources

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[6] Citing works that mention particular kinds of activities at other campuses. Author of source article from Task Force readings is in parentheses.

- o Build strong relationships with faculty, users, and departments by engaging with faculty; by collaborating with them on research and teaching.
- o Frequently inform user groups of current and new library policies, new services, updated facilities, new resources, events, reports, statistics, as well as requests for input.
- o Meet with new faculty upon arrival to discuss their research needs and library resources; to understand the gaps in our collections and what we can do about them; and adjust our collection policy accordingly, if possible. Seek input and evaluation from faculty and user groups for database trials and purchases.
- o Collaborate with faculty to provide feedback to publishers regarding database access and interface.
- o Work with Center and/or departmental faculty library committees to prioritize big ticket purchase and grant projects.
- o Seek opportunities to enhance collections by applying for grants and national libraries' gift/ exchange programs.
- o Lead and participate in regional, national, and international consortia to negotiate purchases and share resources.
- o Collaborate with other subject librarians and other academic units (i.e. Ermal Garinger Academic Resource Center, http://www.ku.edu/%7Eegarc/ , Law Library) with regard to acquisitions and evaluation.
- o Collect and evaluate library materials usage data (i.e. ILL, circulation, etc.) in order to improve our acquisition strategies.
- o Promote collections through exhibitions (online and/or physical), instruction, International Educational Week events, film festivals, and through publications.
- o Create data services applications;
- o Collect and disseminate collection and service data on a national level.
- o Support all document types (books, journals, maps, government information, special collections, electronic, etc.)

- · **Format/Collection Specific services that faculty like/want/must have**, e.g. ILL; GIS; stats/data; special collections, government information

- · **Public relations** (via admin: emails from Dean, news brochures, websites, press releases):
  - o Host special events
  - o Create and distribute higher-level newsletters
  - o Publish press releases

- · **Scholarly communication** (publishing liaison, copyright liaison, special projects liaison)**:**
  - o Provide copyright expertise, advising (Williams)
  - o Provide expertise, advise on author's rights (Williams)

- o Educate & inform faculty, grad students & administrators about scholarly communications issues (Williams)
- o Advocate for sustainable models of scholarly communication (Williams)
- o Work with faculty and students to understand changing workflows and patterns of scholarly communication (Williams, Kirchner)
- o Apply knowledge of how research is conducted in specific disciplines (Williams)
- o Collaborate with departments, research centers, RGS to educate researchers on copyright and author's rights, and build deposit of research results into the grant process (Kirchner)
- o Inform faculty of open access / IR deposit recommendations (Kirchner)
- o Be involved in new models of scholarly communication (Kirchner)
- o Investigate new scholarship practices at the discipline level (Kirchner)
- o Collaborate with faculty journal editors, publishers, re: publishing platform, methods, open access considerations, etc (Kirchner)
- o Participate on editorial boards of faculty-produced or edited publications (Kirchner)
- o Connect faculty with digital publishing opportunities and deposit Center publications into KU ScholarWorks.
- o Scholar Services/Data Center – well trained staff on board to handle Open Access, copyright, electronic journal publishing, and other technical issues; collaboration with subject liaisons is a growing trend; there are some data-related workshops coming in the future.
- o Individual faculty consultations
- o CDS for image management
- o Print journal runs converted and added to KU Scholarworks
- o Introduce / assist faculty with adding publications to KU Scholarworks

- **Reference/Research assistance:**
    - o Apply knowledge of how research is conducted in specific disciplines (Williams)
    - o Provide expert reference / consultation services (by appointment) (Williams, Whatley)
    - o Provide assistance at the reference desk
    - o Provide one-on-one research consultation, especially for thesis and dissertation research.
    - o Provide in-office consultations
    - o Provide individual faculty consultations
    - o Engage in Digital Reference
        - – Instant and text messaging
        - – QuestionPoint ASK a Librarian
    - o Reference/Consultation – we generally have a successful model in place, enjoy strong user support and have successfully incorporated IM; our stats have gone up, countering national trends; subject liaisons consult regularly with assigned faculty and students from assigned areas.

- **Instruction** (one-time and course offerings)**:**
  - Information literacy experts (Williams)
  - Provide instruction through in-person course-integrated sessions, synchronous and asynchronous online environments, and alternative models that better support deep learning (Dupuis)
  - Partner with faculty to integrate information literacy skills into the curriculum; learning outcomes development; course integrated information literacy (Williams, Dupuis, Whatley)
  - Provide high quality reference and research support on-demand & on-line (Williams)
  - Apply knowledge of how research is conducted in specific disciplines (Williams)
  - Engage with faculty and administrators to understand departmental teaching focus, objectives, and challenges for students (Dupuis)
  - Engage with faculty and administrators to identify courses in which library support is most relevant (Dupuis)
  - Provide systematic training for graduate instructors; integrate information literacy and research training as part of graduate student preparation (Dupuis)
  - Instruct using Information Literacy concepts
  - Integrate Information Literacy into syllabi and Blackboard
  - Teach Endnote citation management software / Organize subject specific EndNote workshops
  - Help redesign courses
    - Collaborate with faculty on instruction design to integrate information fluency into their courses.
  - Collaborate and work with faculty and GTA's (and librarians) to improve research instruction, incorporate information literacy
  - Collaborate with Communications and Advancement to promote instruction opportunities, classes, and workshops
  - Citation Management tools support
    - Open workshops
    - Customized workshops
    - One on one consultations at my office, theirs, or over e-mail
      - Creating customized citation styles
      - Troubleshooting
    - Update webpage on EndNote filters for different library databases
  - Electronic Thesis and Dissertation Support (ETD)
    - Co-present each semester at an open presentation for graduate students
    - One on one consultations for graduate students on formatting, converting, and submitting online their thesis and dissertations
    - Open and Customized workshops for Word Workshops for Long Documents (formatting for thesis and dissertations)

- o Provide technical support for online Information Literacy instruction for Communication Studies
  - – Loading online tutorials and quizzes into Coms 130 Blackboard course
  - – Add survey questions (created by Julie Petr) to Survey Monkey and provide link for COMs students and answer survey questions from students
  - – Download and repackage pre- and post-survey results in an Excel spreadsheet with graphs, participate in analyzing results and discussion of future changes to the program
- o Internal Library Research/Instructional Technology Support
- o Teaching – Faculty and students like the subject liaison model; the use of LibGuides represents a significant step in the right direction.
- o Creating/maintaining LibGuides
- o Tutorial development – huge development over the last year
- o incoming QuestionPoint queries, managing instruction lab calendar/room requests
- o Specific class examples:
  - – Graduates Studies Department (GS 700 Series)
  - – Heavy involvement with ENG 101/102 program, PRE 101
  - – English 102 Information Literacy Workshops
  - – Teach for-credit courses (at least two a year): LA&S 292, HNRS 492

- **Informal personal relations** (built up over time through formal relationships (collection liaison) or through **informal relationships** (e.g., "our kids go to the same school"), or both:
  - o Take people to lunch
  - o Importance of social interactions
  - o Chatting while they are in the library

- **Formal assignments to Research Centers** (Hall Center, Higuchi, Museum, etc.):
  - o Hall Center activities
  - o Collaborate with respective Center's outreach director in K-12 teaching and learning, both locally and regionally

- **University level governance**
  - o Serve on / provide information to university governance groups, task forces, etc.
  - o Have official slots in orientation program

- **Outreach to the campus and town community** (high school tours; campus new student orientation programs, etc.):
  - o Speaking engagements to inform groups about resources, services, etc. (Williams)

- o Give library tours to international scholars and students in selected languages.
- o Participate in International Student Orientation (2x yr) and ISO fairs
- o Work with regional and international scholars via federally funded travel grants or international programs.

- **Outreach to Non-Academic Departments** (collaboration within & outside the University):
  - o Outreach to non-academic / academic support departments (Dupuis)
  - o Strong partnerships with and collaboration with Honors Program, the Writing Center, Athletics, NSO, PRE, New Grad Orientation, other Student Success orgs (Advising, KU Info, Multicultural Center)
  - o Collaboration with IDS, CTE on symposia, colloquia, workshops
  - o Haskell
    - – HINU ENG 101 collaboration
    - – TRIO
    - – Intro KUL classes @ HINU Library
    - – Information Literacy Instruction to many departments
  - o Applied English Center
    - – Fulbright
    - – Junior Faculty Development Program
    - – Kansai (Japanese students)
    - – Négoçia (French students)
  - o Work with Learning Studio partners: collaborating, educating and engaging other non-academic departments and services including:
    - – Student Success
    - – Writing center
    - – Student advising
    - – Tutoring services
  - o Kansas Unions

- **Support routine use of web-based Libraries systems and tools**:
  - o Often involve interactions not just with library users and Libraries staff, but with KU IT as well (i.e. these are often highly collaborative affairs in which many people play parts of varying sizes).
  - o Methods include email, phone, and face-to-face
  - o Broad categories/examples include:
    - – Troubleshooting access problems to licensed resources
    - – Assisting users with Libraries systems available to the general KU campus (item submission in KU ScholarWorks)
    - – Assisting users with Libraries systems with smaller, more targeted user groups (e.g., art history images in the Digmaster archive, existing Journals in OJS)

- **Internet presence (human-computer interactions)**
  - o Develop & manage online learning spaces

- o Partner with others to build & maintain data curation infrastructure (Gabridge)
- o Assist in development & creation of tools & services to facilitate scholarly communication (Williams)
- o Involve faculty and students in planning for new libraries' tools or systems, or expanding the capabilities of existing systems.
  - – often highly collaborative affairs, and often mediated initially by other Libraries staff
  - – Tend to develop over time
  - – Modes include email, phone, and face-to-face
  - – These are harder to generalize, so here are some recent examples:
    - Customizing or extending OJS (e.g., to support new journals, or to support the changing needs of existing journals)
    - Customizing or extending DSpace for new uses (e.g., to support the Open Access policy, to deposit new types of content)
    - Evaluating the suitability of existing Libraries systems for new projects, or options for bringing up new systems for supporting faculty projects.
    - Participating in broader campus discussions about the Libraries role in new/emerging initiatives (e.g., the Digital Directions task force)

- **Physical Spaces by which we connect:**
  - o Develop and manage physical learning spaces (Williams)