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Assessing Library Competencies for the Future: The LibGOAL Toolkit for Success

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Abstract

What are the essential competencies that future library professionals will need as individuals, as team members, as members of a university, and as citizens? What are the personal and organizational competencies to guide their education and professional development to become proficient in these competencies? This article will detail the process by which a group of thinkers and doers came together to identify these essential competencies and develop a toolkit to help both new and seasoned academic library professionals prepare for their future. This group was comprised of ten library professionals from eight institutions and three members of **brightspot strategy**, a higher education strategic consultancy with extensive experience planning library services, staffing, and spaces.¹

The toolkit we created — called **LibGOAL** — is a card sort planning activity for teams of library professionals to help them identify, discuss, and align their priorities for future personal and organizational growth. In this article, we will define the problem we set out to solve, summarize our environmental scan of competency frameworks outside of and within the library world, explain our initial competencies and how we organized them into categories, recount the development of the card sort activity, share the lessons from initial testing and outreach, and identify our next steps to create an open and free community resource.

Introduction

What are the essential competencies that future library professionals will need as individuals, as team members, as members of a university, and as citizens? How can they identify personal and organizational competencies to guide their education and professional development to become proficient in these competencies? To answer these questions for both new and seasoned library professionals, ten library professionals from eight institutions and members of **brightspot strategy** came together to define the problem, look for example competency frameworks beyond and within the profession, brainstorm competencies and ways of categorizing them, develop a prototype tool, test and polish it, and then launch it at a library conference in late 2018.

Along the way, our group has modelled the kinds of skills and activities we think are important for the future such as collaborating face-to-face and at a distance, brainstorming, prototyping,

and making an impact for ourselves, our teams, our institutions, and our profession. It has been a non-linear process in which we have been learning along the way. We look forward to continuing this process as more people get involved as users, contributors, or both to create an open-access community resource that can help guide recruiting, development, organizational design, and performance management for library professionals.

Problem Definition

LibGOAL started with an insight from **Todd Gilman** during the editing of *Academic Librarianship Today*.² He observed that library professionals now often have an equal seat at the table at institutions as they think about teaching and learning with faculty. No longer limited to ad hoc student orientations, sporadic consultations, and chance collaborations with faculty, library professionals can be shaping syllabi, directing academic centers, and team teaching. With this observation came another one from the group as we discussed the topic of competencies for library professionals in the future: often library professionals are ill-prepared to be equal partners

in teaching and learning both from their formal education and in their career development. So, we then came together to identify the competencies needed to close this preparation gap.

When we came together, perhaps as a result of our diversity of perspectives, experiences, and institutions, we recalled the idea of the “T-shaped” person. This

concept, originating in the late 1970s³ and then popularized by IDEO’s **Tim Brown** more recently,⁴ posits that people should have specific vertical areas of deep expertise coupled with horizontal skills and knowledge that cut across roles and departments, enabling collaboration. With this in mind, we realized first that teaching and learning would be a vertical competency in this schema (along with areas like user experience, scholarly communications, and makerspaces) and second, that to be of real value, we should define the horizontal competencies that are likely common to all roles within a library — competencies like communication, creativity, and project management. Thus we defined the problem, the opportunity really, as the identification of essential



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competencies that future library professionals need to guide their education and professional development.

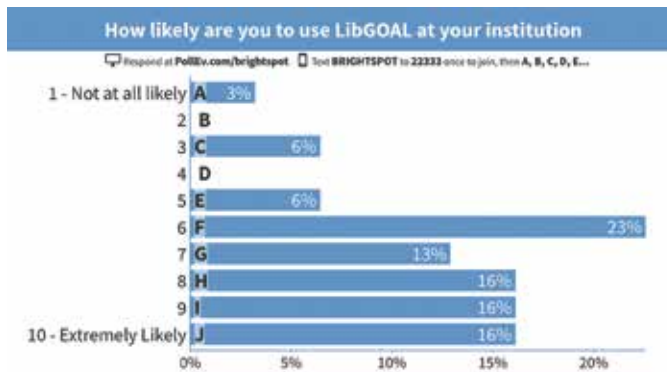
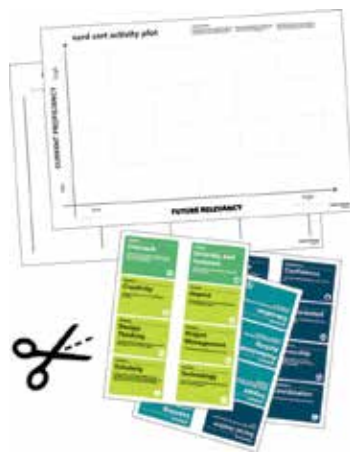
Environmental Scan

To understand the context and inform the development of the toolkit, we looked both within the library world and outside of it. Looking within, we reflected on the scenario planning work that the **Association of Research Libraries (ARL)** did in 2010 to imagine the future 20 years out, based on how constrained and how diffused research might become.⁵ This yielded four **ARL** scenarios:

1. **Research Entrepreneurs:** A future shaped by the rise of entrepreneurial research where individual researchers are the stars of the story as creators of high-value new knowledge.
2. **Reuse and Recycle:** A future in which reuse of research activities dominate “because of an anticipated scarcity of resources for the research enterprise.”
3. **Disciplines in Charge:** A future in which scholars align themselves around data stores and computational capacity that address large-scale research questions within their research field.
4. **Global Followers:** A future in which the research enterprise is relatively familiar, but the cultural context framing research changes because of funding shifts from North America and developed western nations to nations in the Middle East and Asia.

Our group also explored existing articles and competency frameworks within the profession; for instance, **Bertot, Sarin, and Percell** identified competencies in their 2015 article “Re-Envisioning the MLS: Findings, Issues, and Considerations” (which read like attributes) including Collaborative, Inclusive, Flexible/Adaptable, Creative, Risk Takers, Socially Innovative, and several others.⁶ The **NASIG** (formerly the **North American Serials Interest Group, Inc.**) report on Core Competencies for Scholarly Communication Librarians identified the themes of Background Knowledge, Technical Skills, Outreach and Instruction, and Team Building as well as five areas of emphasis including Institutional Repository Management, Publishing Services, Copyright Services, Data Management Services, and Assessment and Impact Metrics.⁷

Our look outside the library profession was equally useful. For instance, the **Society of Actuaries (SOA)** has a self-assessment tool in which individuals rate statements about their skills and knowledge included in the competency framework in two dimensions: the importance to their work and the individual’s ability to perform it.⁸ This tool provided a critical clue that not all competencies will be equally relevant and prioritization based on the institution and the individual is an important step. The **Chartered Global Management Accountants (CGMA)** also created an excellent framework in 2014 whose four categories of competencies tell a kind of story about how professionals “apply accounting and finance skills (technical skills), in the context of the business (business skills), to influence people (people skills), and lead within the organization (leadership skills).”⁹ These four categories inspired **LibGOAL’s** four horizontal scales: Technical, Professional, Interpersonal, and Strategic.



Categories and Competencies: Origins

Early decisions centered around the ways in which the team would define what a librarian of the future looked like and what skills that librarian needed. Brainstorming during a workshop at **brightspot strategy** resulted in identifying a mix of soft and hard skills, new areas of expertise, and emerging roles. As the team searched for common themes among a multitude of possibilities, an organizing schema emerged. Many of the competencies fell into one of two categories. One set reflected leadership and management activities, such as change management, ethics, vision, risk, and diversity. The other addressed functional areas such as learning, scholarly communications, and data management. It is at this point that the model of the “T-shaped person” began to emerge based on two sets of scales, horizontal and vertical. The horizontal axis would reflect strategic competencies while the vertical would apply to the functional skill sets.

To test the feasibility of the T-shaped model, the team selected teaching and learning and scholarly communications for building out a set of competencies. For the former, team members used their own expertise to construct the competencies, while the latter was based on competencies developed by a library association. For teaching and learning, the challenge was to identify just ten key concepts to represent a broad range of educator practices and knowledge. For scholarly communications, a set of competencies was adopted from the aforementioned **NASIG** Report.

We also learned that to inform the development of future competencies, a team member should be tasked with establishing a hierarchy of competencies in their area of expertise and to aim for broadness of coverage. At that point, additional team members should review the content to determine if the listed competencies will manageably transfer to the card set or if refinements are necessary. Developing these categories and competencies is a team sport that requires the accumulated knowledge and practical experience of all of its members. Ultimately though, practitioners who participate in our public prototyping exercises can inform how well choices were made and influence further refinements.

Prototyping and ARL Conference

Once we had determined the horizontal competency scales, we defined the horizontal competencies, and drafted the initial vertical competencies; for instance, horizontal competencies included creativity, ethics, assessment, outreach, and social justice while vertical competencies would fall under categories like scholarly communications, teaching and learning, and makerspaces. Then, the group collaborated on the development of a card sort activity prototype. The prototype included cards listing each horizontal and vertical competency along with a card sort activity plot and an action plan plot. The cards included in the initial prototype listed each competency along with a brief definition in order to help users determine the meaning and relevancy of each competency area. The initial prototype also included a detailed set of instructions for plotting the competency cards for relevancy and proficiency and creating an action plan for organizational and/or personal development.

Once the prototype was developed, we tested it at libraries from seven academic institutions, including **Columbia University, Carnegie Mellon University,**

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ty, North Carolina State University, Skidmore College, Tufts University, UCLA, and Wheaton College. Based on the feedback from our initial testing, we revised the prototype activity and instructions to clarify the wording of each competency and we provided an example of what each competency might mean in practice. Based on our testers' perceptions of the activity, we also reworked the instructions to make it more game-based and focused on plotting fewer cards. We made these changes to set participants' expectations that like a game, they'll learn as they go, to encourage participants to prioritize competencies, and to make sorting 50+ cards more manageable.

This revised prototype was tested once again at the 2018 Library Assessment Conference, where we facilitated a workshop of approximately 50 participating library professionals working in small groups to test and provide feedback on the toolkit. Each group was made up of no more than five people and was provided with a brief strategic overview of one of four sample institutions representing a range of academic library types, including a large public research university, a private research university, a small liberal arts college, and a community college. Each group then spent ten minutes to decide on which area of the library they represented (e.g., leaders, user experience, teaching and learning, etc.) and to have a quick chat about the sample institution. They then worked in their groups to choose no more than five cards to plot in two horizontal categories and one vertical category over the next 30 minutes. Each sample institution had one of the LibGOAL creators available to facilitate sorting and plotting the cards, which helped us to understand better some of the difficulties and sticking points in the current prototype. After each group completed the activity, we solicited real-time feedback using PollEverywhere, asking participants how likely they would be to use LibGOAL at their institution, what local institutional problem they thought it might best solve, and what they would change about the toolkit. That feedback will be incorporated into our lessons learned and next steps.



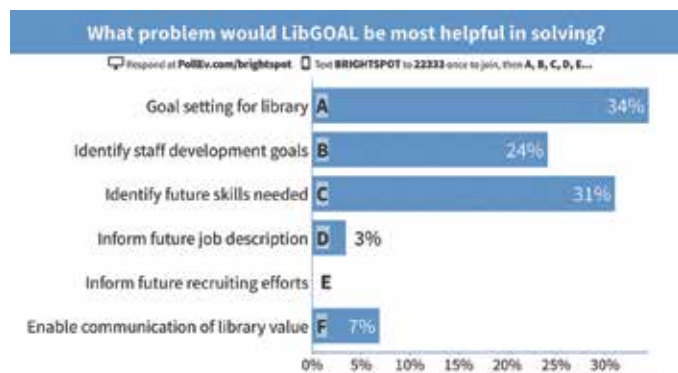
In addition to making the toolkit more usable, we plan to recruit more people to work with the LibGOAL team. These additional collaborators will help to ensure that the continued expansion of the toolkit is as relevant as possible to as many library professionals as possible. To be sure, no single tool can be everything to everyone. Nonetheless, we hope to make it easy for future collaborators to create new LibGOAL card sets or devise new activities with existing cards.

Conclusion

We set out to help librarians be true partners to faculty in advancing teaching and learning at their institutions. By walking the talk and modeling a creative, collaborative problem-solving process, we redefined the problem to be about helping to create "T-shaped" library professionals with vertical depth of expertise (e.g., teaching and learning), as well as horizontal skills to enable collaboration and impact. We now have a useful set of competencies, as well as an effective and fun process for assessing today and planning for tomorrow. But if there is one lesson library professionals have learned well, it's that great content is not enough to ensure use and relevance. For LibGOAL to become an indispensable tool for the community, it needs to be a platform to which many more people can contribute, by providing feedback or authoring a section, so that practitioners find it substantially informs their continuing education and professional development. Readers can test out the LibGOAL toolkit and get involved in further developing it by visiting www.libgoal.org.

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Lessons Learned and Next Steps

On the basis of feedback from prototyping participants and attendees at the ARL Assessment Conference session, the LibGOAL team has plans to add team members and develop the tool further. In particular, we know that LibGOAL will benefit from increasing the diversity of the team working on it in terms of racial, ethnic, age and institution type. We will work to develop more verticals from which to choose, reflecting a wider range of library professional roles. As noted above, we will continue to refine and clarify language on the cards and streamline the number of cards because we want to avoid overwhelming participants as well as overcrowding the activity plot with too many cards to sort at once. We will also draft clearer framing for the card sort activity and provide more instructions for facilitators to prompt conversations among participants. One way we plan to do this is to "gamify" the activity more so that participants view it as a more explicitly heuristic exercise rather than a prescriptive diagnosis.

Endnotes

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