

Program Evolution

Strategic Objective III.1 Formalize the Network of Library Liaisons to Departments and Academic Programs Across the University to Strengthen Relationships. Build Liaisons' Subject and Information Expertise to Enhance Ongoing Dialogue with Researchers.

Final Report

I. Introduction

In September, 2011, the Library Executive Group (LEG) charged a small team of library staff to work on developing one of the strategic priorities for the Library for the period 2012-2015, i.e. formalizing the network of library liaisons to departments and academic programs.

The team members include:

Kathy Chiang (co-chair)
Virginia Cole
Dan McKee
Fiona Patrick (replaced by Gail Steinhart)
Patrizia Sione
Kornelia Tancheva (co-chair)
Jill Wilson
Drew Wright

The LEG sponsors of the team are Janet McCue and Oya Rieger.

In a discussion with the sponsors, the following goals were set:

- Look at the University's strategic plan goal regarding library services for faculty and build a robust cohesive program around it.
- The program should include, among other things, a table matrix of liaisons, updated job descriptions, clear expectations for liaisons, training for liaisons, means of spreading resources across units; and two-way communication (from library to faculty and from faculty/departments to library).

The team was asked to conclude its work by the end of December 2012.

LEG and the Managers' Council also produced an initial Goal/Objectives/Deliverable Document, which the team revised and is attached at the end of the report as **Appendix 1**.

II. Executive Summary

1. Environmental Scan of Liaison Activities at CUL

The team completed an environmental scan of the current liaison activities at CUL, which revealed that they are robust and diverse and take into account the specificities of the schools, colleges, and disciplines, the expertise of current liaisons, as well as staffing patterns at each library.

Generally speaking, liaison activities focus on two areas: research support services (including in-depth reference support and instruction) and materials selection. Some liaisons focus on only one of those areas, others on both in various proportions.

Assigning of liaisons varies by library—in some units, one liaison is assigned to multiple departments, in others, all liaisons are assigned to individual faculty, in still others, one liaison is assigned to a department. In rare cases, the liaison responsibilities are shared between a selector and a reference librarian. In departments which reside in multiple schools, more than one liaison is assigned from different libraries. Thus, the number of faculty per liaison varies greatly.

The full environmental scan of the current liaison activities, including conclusions and recommendation, is included as **Appendix 2**.

2. Environmental Scan of Other Institutions

The team completed an environmental scan of liaison activities at other institutions, which revealed that most liaison programs in polled institutions, with the exception of a few, are informal, fluid, with no dedicated funding, no formal training, and no assessment tools. In all polled institutions, however, significant efforts are underway to maintain strong relationships and share information with the academic communities the libraries serve.

The full environmental scan of other institutions is included as **Appendix 3**.

3. General Expectations and Suggested Best Practices

Based on the conducted environmental scans and the feedback of the team's LEG sponsors, who identified three areas to focus liaison activities on: reference and instruction; collection development, and scholarly communication, the team compiled documents delineating the general practices (for liaisons who do not work in the specific area) and suggested best practices (for liaisons who do work in the respective specific areas), which are included as **Appendix 4**.

These documents were compiled and revised multiple times after the team gathered feedback from liaisons and library administrators at the Reference and Outreach Forum, selectors' teams (Humanities, Social Sciences, Sciences, Area Team), PSEC, CDExec, individual liaisons, as well as faculty.

Appendix 2: Current Liaison Activities at CUL

Based on interviews with unit library directors or their representatives, as well as discussions with the Reference and Outreach Committee, and representatives of Collection Development, Digital Scholarship Services and IT. Examples are provided for illustration and are not meant to be exhaustive.

I. General Description

The current liaison activities at CUL are robust and diverse and take into account the specificities of the schools, colleges, and disciplines, the expertise of current liaisons, as well as the staffing patterns at each library.

Generally speaking, they focus on two areas: research support services (including in-depth reference support and instruction) and selection. Some liaisons focus on only one of those areas, others on both in various proportions.

Assigning of liaisons varies by library—in some units, one liaison is assigned to multiple departments (e.g. Mann, Vet, Engineering), in others, all liaisons are assigned to individual faculty (e.g. Law, JGSM, ILR, Hotel), in still others, one liaison is assigned to a department (e.g. Olin/Uris, Music, Fine Arts, Math, Africana). In rare cases, the liaison responsibilities are shared between a selector and a reference librarian (e.g. in Philosophy where the selector is in LTS and the reference librarian in Public Services). In departments which reside in multiple schools, more than one liaison may be assigned from different libraries. Thus, the number of faculty per liaison varies greatly.

Certain programs and centers also have liaisons (e.g. Fulbright, Institute for European Studies, Institute for Social Sciences, Society for the Humanities Olin/Uris), Center for Real Estate Finance (Hotel School); Moot Court (Law)).

The virtual libraries (Physical Sciences, Engineering) have pioneered the model of embedded librarians who offer office hours in departments.

Some units also work closely with their School's Administrations (Hotel, JGSM, Vet, Law).

II. Liaison Activities in the Area of Selection and Collection Development

In the area of selection and collection development, the liaisons who are also selectors, engage in activities such as:

- Building the collections; responding to purchase requests, reviewing cancellations, Annex transfers, etc.; identifying gaps in the collections, securing resources and filling the gaps
- Intelligence gathering; engaging faculty and graduate students; communicating developments and activities
- Provision of alerts on selected subject resources (Africana, Music, Mann, Olin/Uris); new book lists (all); new e-resources updates (PSL; ILR)
- Monthly updates on collections
- Attendance at subject-specific conferences (Math, Olin/Uris, Mann)

- Focus on scholarly communication and online publication patterns (Math)

III. Liaison Activities in the Areas of Research and Instruction

In the area of research and instruction support, the liaisons, who are also reference and instruction librarians, engage in activities such as:

- Research Consultations (all)
- Teaching support (all)
- Faculty paper processing (RMC, Engineering)
- Digital repositories support (e.g. Digital Commons at ILR)
- Compiling profiles with research interests; help with research, including emergency cite checks (Law)
- Liaison for journals (e.g. Law)

IV. Liaison Activities in the Area of Scholarly Communication

This is the area of greatest variety in the extent to which liaisons engage in it. Some of the reasons might be that it is comparatively newer to the portfolio of library liaisons; that the concerns in scholarly communication manifested at a very different speed in the sciences, the social sciences, and the humanities; as well as the fact that the expertise required in some areas of scholarly communication (e.g. copyright) is very specialized.

V. Methods of Communication and Engaging with the Academic Community

These vary again depending on the local environment, the needs of the discipline and program, and the library staffing. The following are generally employed:

- Attendance at department events (department meetings, colloquia and seminars: Music, PSL, Engineering, Olin/Uris; job talks: Music, Olin/Uris; forums: Music; formal and informal department gatherings: Physical Sciences)
- Participation in various CU committees and task forces (RMC), school committees (Hotel), department committees (Olin/Uris)
- Participation in faculty hiring process and prospective graduate student recruitment (Olin/Uris, RMC)
- New faculty and graduate student orientation (all)
- Alerts to departments, administrative managers, etc. about services and facilities
- Participation in faculty library boards
- House calls (Vet)
- Participation in graduate students' organized or sponsored events (e.g. graduate reading group: Music; pro-seminars (Olin/Uris) and serving on dissertation committees (Olin/Uris) and as faculty advisors (Law)
- Production of various PR materials: brochures, web sites, blogs by unit (Engineering, Math, PSL; Olin/Uris, Law) and by subject areas (e.g. History, English), digital signs, social media, etc.

VI. Comments

The following general insights and recommendations emerged from the discussions with library directors and outreach coordinators:

- The success of our liaison efforts depends on resources, but also on a chemistry between the department/program and the liaison
- Resources among libraries vary
- Being in the building where the college is makes liaison much easier
- While everyone uses CountIt, only Management is piloting a Customer Management System.
- There is a feeling that not enough information is provided for liaisons on library-wide initiatives.
- Leverage resources across the system to ensure liaison sustainability (e.g. Olin and FA, Mann and Vet)
- Collaborate with other functional units (e.g. DCAPS, Metadata Services, IT) to create a production line behind public services liaison activities
- Provide a consistent level of liaison engagement across the system that is customized for the local audience
- Formalize the liaison program based on department and program affiliation but also on subject areas
- Provide a “best-practices” blue-print for liaisons
- Provide training for liaisons and encourage them to increase subject expertise and knowledge of departments
- Provide regular information on library-wide initiatives for liaisons
- Leverage expertise in areas that span subjects more effectively (e.g. RMC, GIS, data curation, visual resources)
- Make time for liaison activities and make this activity a priority
- Specify expectations, make liaison activities part of the performance dialogue, provide measures of success
- Provide a forum to share the information both with staff in the units and across the system

Appendix 4: General Expectations and Suggested Best Practices for Liaisons Documents (final revision Oct. 2012)

Reference and Instruction

Instruction

General expectations for liaisons who are not instruction librarians

- Promote library instruction
- Know about the Library Instruction web site: <http://www.library.cornell.edu/svcs/serve/classinst>
- Be familiar with the dimensions of the library instruction program---including course-integrated, customized library research sessions at the undergraduate as well as graduate level, workshops on topics like images and citation management, orientation for new graduate students in a given department, etc.
- Be aware of current information literacy developments
- Be aware of the efforts of unit instruction coordinator(s) and the PSEC Instruction Committee to promote library instruction, etc.
- Serve as a communication conduit between faculty and the library regarding their existing and evolving needs for Instruction services and tools
- Be able to refer instruction issues and requests to appropriate unit instruction coordinator(s)

Suggested best practices for liaisons who are instruction librarians include:

- Maintain regular contact with department/program including directors of undergraduate studies and the directors of graduate studies to learn about curriculum and discuss instruction issues
- Examine the schedule of classes each semester; identify core/foundational, research methods, and capstone courses, contacting appropriate faculty
- Analyze department curriculum; identify and target critical courses for library instruction and work with the pertinent faculty
- Deliver effective instruction which includes class sessions and other mechanisms such as LibGuides, individual research consultations, online tutorials, handouts, etc.
- Develop plans and strategies to deliver effective instruction for target populations
- Develop instructional programs and learning materials in a variety of formats, using instructional design principles
- Engage in reflective teaching through use of instructional improvement tools such as attending forums, discussion groups, workshops, speakers, and peer evaluation, etc.
- Attend workshops and other activities organized by the Instruction Committee
- Create student learning outcomes for library instruction sessions, assess learning, and use assessment to improve instruction and student learning
- Identify, explore, and use new technologies to enhance student learning, as appropriate

- Engage faculty and other teaching staff in order to integrate information literacy concepts and skills into the curriculum.

Reference Services

General expectations for liaisons who are not reference librarians

- Promote reference services and Ask a Librarian
- Be aware of hours and staffing, and current formats and scope of reference service
- Serve as a communication conduit between faculty and the library regarding their existing and evolving needs for reference services and tools
- Be able to make referrals to appropriate reference staff

Suggested best practices for liaisons who are reference librarians include:

- Maintain regular contact with department/program to learn about researchers' needs and discuss research support issues
- Be proficient in effective catalog and database searching, finding sources, requesting materials, citation style, current alerts, citation management, information management, technical troubleshooting, etc.
- Keep current with new databases, resources, technologies, library discovery systems, library web site design, etc.
- Attend reference training sessions
- Answer questions fully and knowledgeably
- Participate in staffing of reference desk, email, phone, chat, and/or text a Librarian
- Provide research consultations

Scholarly Communications

General expectations for liaisons who are not experts in scholarly communication

- Be familiar with emerging issues (e.g., open access mandates) and programs (e.g., A&S grants, Cornell Open Access Publication fund) in scholarly communication.
- Be familiar with resources and service points to assist with intellectual property rights issues, including copyright, fair use and plagiarism.
- Promote use of institutional and subject repositories and foster a better understanding of open access and new models of scholarly communication.
- Engage faculty and teaching staff regarding digital media creation opportunities.
- Be sufficiently informed of issues related to data management in order to make appropriate referrals to the Research Data Management Service Group (RDMSG) or other experts.
- Serve as a communication conduit between faculty and the library regarding their existing and evolving needs for scholarly communications services and tools

- Be able to refer scholarly communication issues and requests to the appropriate service providers

Suggested best practices for liaisons who are scholarly communication experts Include:

- Maintain regular contact with department/program to learn about researchers' needs and discuss scholarly communication issues
- Develop familiarity with CUL's repositories (such as eCommons, Mann Locale, arXiv, DigitalCommons@ILR, and SharedShelf) and service points to provide preliminary information and referrals to faculty/researchers.
- Maintain current awareness of data management trends and issues (data management plan requirements, sharing research data) and promote awareness of policies that pertain to research data (funders' requirements, IPR, privacy, confidentiality).
- Build awareness of Cornell/CUL programs that support open access and sustainable publishing, such as the Cornell Open Access Publication (COAP) fund, and direct interested researchers to the appropriate contacts.
- Facilitate the implementation of new policies (such as the 2007 NIH public access policy) by informing faculty of them and related CUL support services.
- Identify needs for continuing copyright and IPR education and refer those to copyright services as appropriate.
- Identify potential needs for digital content creation and collaborate with digital media service providers on subsequent project development and management.
- Seek partnerships with faculty on digitization initiatives such as the ones funded by the A&S grants.
- Promote awareness of best practices and available services for digitization and archiving of personal holdings

Collection Development

General expectations for liaisons who are not selectors:

- Be aware of faculty and graduate student research interests and needs
- Be familiar with collections and appropriate collection development policies
- Be familiar with current publishing trends
- Be familiar with CUL's collections fundraising initiatives
- Be aware of gift policies
- Be aware of cooperative partnerships, such as 2CUL
- Serve as a communication conduit between faculty and the library regarding their existing and evolving needs for collection development services and tools
- Be able to refer collection development issues and requests to the appropriate selector(s)

Suggested best practices for liaisons who are selectors include:

- Maintain regular contact with department/program to learn about researchers' needs and discuss collection development issues
- Develop, monitor and analyze collections to support advanced researcher's subject areas
- Build and maintain relationships with faculty and other researchers, including participating in joint projects, and inform them of new resources in their areas of interest, including electronic databases and other research tools
- Participate in the department/program activities, as appropriate to discipline and specific library's policies and expectations
- Build relationships with donors, including communicating with endowment fund donors, working with Library Development, and assisting in the gift process
- Communicate with colleagues inside and outside Cornell to seek opportunities to pool funds and share resources where appropriate, and coordinate related efforts
- Follow "Competences for Selectors" established by CDExec
(<http://www.library.cornell.edu/colldev/cdcompetences.html>)

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LIAISON SERVICES

Strategic Document

INTRODUCTION & BACKGROUND

The Liaison Services Department developed this strategic document in the summer of 2013 with revisions in summer 2014. It maintains the Mission, Vision, and revised Values from the departmental documents that guided our work from 2011 to 2013, but provides a new set of goals for 2014-2015.

All members of the Liaison Services Department contributed to this document by participating in facilitated discussions about our departmental values, a SWOT analysis, brainstorming sessions based on the UH Libraries new 2013-16 Strategic Directions and the university's Tier One initiatives, and a conversation about our definition of success for the department. The department heads and Liaison Leadership Team reviewed the results of these activities and synthesized them into a single document.

Our department's 2014-15 goals align closely with the university priorities of National Recognition, particularly for research, and Student Success, as well as with the UH Libraries' Strategic Directions, especially "Target Specific User Groups with Customized Services and Niche Collections" and "Promote UH Libraries with a Consistent Message and a Focused Outreach Strategy."

The goals also include two departmental values we seek to highlight and enhance this year, Internal Collaboration and Accountability, and include under the umbrella of Liaison Services the goals of two committees whose membership goes beyond the department, the Instruction Management Committee (IMC) and the Collection Management Committee (CMC). We have included these areas in our departmental goals in order to encourage Liaison Services members to thoughtfully consider how their work can uphold two especially important departmental values and to establish stronger relationships between the department and the committees that oversee two of the functional areas for which liaison librarians are responsible.



Mission

What We Do & Why

The liaison services department connects the campus community with quality information and library services, engages in academic conversation across campus, and contributes to the scholarly community in order to advance the teaching and research mission of the university.



Vision

What We Aspire To Do

We aspire to empower all UH students to inquire about and discover the power of information and new possibilities.

We aspire to be a creative partner with faculty and staff to facilitate innovative teaching, student success, and research productivity.



Values

How We Conduct Ourselves

Campus Relationships

We believe building connections and relationships across campus increases the visibility of library services and increases the success of students and faculty.

Expertise

We have expertise that contributes to teaching and research, and we strive to partner with campus stakeholders to advance the mission of the university.

User-Centered

Our services and initiatives are based on user needs. We will ask why a service or initiative is needed; consider its value; apply research, data, or assessment; discuss opportunities it affords our users, and plan for how we will measure its success. We will not let this inhibit our ability to move quickly, but rather, we use this to test how well we have thought through our ideas.

Continual Improvement

We are willing to improve and invest in new ideas learned from one another, collaborators, and professional activities.

Internal Collaboration

We work in teams to leverage expertise, both within the department and throughout the UH Libraries, in order to strengthen our ability to achieve our vision and goals.

Accountability

Out of respect for each other and the work we do, and in order to provide the highest possible level of service to the campus community, we hold ourselves and our colleagues accountable for meeting goals, expectations, and commitments. We believe in openly communicating about accountability and we will seek and offer feedback to help hold ourselves accountable.

Emotional Intelligence

As a department we seek to improve our relationships, communication, and organizational culture by committing to a shared effort of self-improvement and self-reflection around all attributes of emotional intelligence.

Liaison Services Goals 2014-2015

Focus On Values

Internal Collaboration:

- Communicate our goals to stakeholders and UH Libraries collaborators
- Balance our pursuits with other departmental priorities
- Work to help other departments meet goals when possible

Accountability:

- Be more purposeful about sharing and following through on training and learning opportunities
- Build documentation procedures into projects
- Continue to assess at least 50% library instruction sessions, and focus on making positive changes by turning our assessment feedback into action

Graduate Student Support

- Develop a sustainable, comprehensive model for a workshop series focused on knowledge and skills needed to be successful as researchers and teachers.
- Create and implement a program to market current services and resources to graduate students across colleges. Make recommendations on how this program can be sustainable.

Outreach & Research Support

- Create a solid foundation for expanding our data-related services by building relationships, awareness, and infrastructure, both internally (within the Libraries) and externally (on campus and in the community).
- Determine our core services as a department and develop a method to identify department members with particular skills or expertise and ensure appropriate intra-departmental collaboration.

Instruction

- Develop a comprehensive online learning plan to address a growing expansion of online courses.
- Using the new ACRL IL Framework and the curriculum mapping project results, create programmatic learning outcomes and strategies.
- Continue to assess and change lower level modules and instructional approaches, keeping in mind the new IL Framework.

Collections

- Continue to align collections activities, especially the acquisition of new resources, with university priorities, as indicated by new degree programs, faculty hires, increasing enrollments, etc. Specifically, determine a methodology for general prioritization of subject areas.
- To ensure close alignment with university priorities and good stewardship of our resources, continue collection assessment processes, including implementing changes based on recent collection assessment projects.

KU Libraries' Consultant Model

Recommended
actions for
implementation

Erin Ellis, Judith Emde and Beth
Whittaker—June 23, 2014

APPENDIX A

KU Libraries Consultant Model July 2013

In May 2013, KU Libraries' executive leadership commissioned the development of a consultant model sufficiently agile to respond to an ever evolving research and learning landscape. It was determined that the Libraries' liaison model, in which an individual librarian performed an array of duties in reference, collection development, instruction, and department-specific outreach, could not be reliably sustained. While the liaison model has been a key to the Libraries' past success, with changing emphases of the University's goals and a need to reaffirm the Libraries' contribution to the University's mission, a different model was deemed necessary to meet the complex needs of our patrons. The Libraries' executive leadership felt it must reposition and re-concentrate the expertise of its faculty and staff in order to meet emerging user needs and expectations and to address significant Libraries and campus-level strategic initiatives.

KU Libraries executive leadership appointed three Assistant Deans--Erin Ellis of Research & Learning, Judith Emde of Content & Access, and Beth Whittaker of Distinctive Collections--to develop a consultant model for KU Libraries. Over the course of 10 meetings between May 30 and July 10, this group examined many issues related to the conceptual model of a consultant in a user-centered organization and the attendant implementation issues, and reflected on feedback received from Libraries employees through informal conversation and emails, and through consultation with other stakeholders. The group agreed that the Libraries would be best served by a general "canopy" model that could be applied to all consultants within the organization, with the understanding that the manifestation and expectations associated with consultant work will necessarily vary across divisions.

Who are consultants?

Consultants will be the Libraries' faculty and professional staff members who cultivate and maintain relationships through proactive, regular engagement with KU faculty and students, as well as our Kansas community and affiliates, in support of research, teaching and learning.

What will consultants do?

Consultants will be tasked with outreach to their appropriate constituencies to the benefit of KU Libraries and its strategic initiatives. The specific consultation activities performed by consultants are dependent upon the division in which the consultant is based; the fundamental expectations associated with consultation in each division will be determined by the respective Assistant Dean and department heads.

How does the Consultant Model differ from the Liaison model?

As the Libraries transitions into its new organizational structure, many duties formerly performed in the course of liaison work will be assigned to dedicated personnel, allowing staff to concentrate on their

principal area of responsibility. The anticipated timeline for major components of this transition include:

- By July 2014, Research & Learning and Content Development personnel will transition away from primary performance of reference desk duties, except where specific expertise is requested
- By July 2015, Content Development personnel will transition away from primary performance of instruction duties, except where specific expertise is requested
- By July 2015, Research & Learning personnel will transition away from content development duties

Therefore, with this redistribution of work, the consultant model will focus on the performance of consistently effective and relevant collaboration, outreach, and relationship building with KU faculty and students. The consultant model is also highly reliant upon coordinated application of expertise from across the Libraries' divisions and throughout all levels of the organization.

How will the transition to the consultant model proceed?

In the immediate future, those who performed actively in the former liaison role should:

- Continue to field questions from KU departments, while also referring to appropriate Libraries personnel (e.g., Content Development; Office of Scholarly Communication & Copyright; etc.)
- Faculty and staff within Content Development and Research & Learning will facilitate the transition process by consulting with John Stratton (Center of Undergraduate Initiatives) or Scott McEathron (Center for Graduate Initiatives) on instruction requests in order to determine the best route of instruction.

In the future, general campus announcements will be coordinated through the Centers, in consultation with the Office of Communications & Advancement. The Centers will solicit Libraries' departments for content. Libraries staff can continue to contact KU departments and schools with questions and announcements specific to their areas.

Because faculty and professionals in Content Development and Research & Learning eventually will not be scheduled for the Anschutz and Watson reference desks, for those questions requiring in-depth assistance, subject and service specialists will be contacted. A referral list with contact information will be developed and maintained.

With the Libraries' web site currently being updated through a content management system, the Libraries will place a prominent emphasis on the "Ask a Librarian" feature. This service will assist in referring to the appropriate staff member. Training and assessment will be key in ensuring appropriate referrals.

Additionally, KU Libraries leadership will be in conversation with the Assessment Team of the Strategy & Innovation Division to discern the best process for assessing the efficacy of this new model overall and guiding alterations as necessary based upon assessment findings.

APPENDIX B

KU Libraries' Consultant Model: moving toward implementation May 2014

Soon after the reorganization in 2013, the Libraries' administration established an effort toward a consultant model that would better enable the Libraries to respond to an ever-evolving academic landscape. Ensuring our future relevance requires the Libraries to recast how we approach services to our users; we will focus on identifying and meeting the core research and information needs of the user, regardless of the discipline from which that user comes.

In the initial development of the consultant model, a two-year timeline for transitions of duties was established:

- By July 2014, Research & Learning and Content Development personnel will transition away from performance of reference desk duties, except where specific expertise is requested
- By July 2015, Content Development personnel will transition away from performance of instruction duties, except where specific expertise is requested
- By July 2015, Research & Learning personnel will transition away from content development duties

Much of the work of transitioning is already well underway. In as much as possible, the time to complete these transitions is now, in order to address key issues raised during the focus group sessions and prepare for a fall 2014 implementation.

What follows is set of considerations, developed by Assistant Deans Erin Ellis, Judith Emde and Beth Whittaker, for defining the role of expertise in content development, instruction and reference, and moving us closer to implementation of the consultant model. In order to formulate the most effective transition to the consultant model, these ADs are seeking ideas and feedback about the successful implementation of this transition from KU Libraries' faculty and staff.

EXPERTISE

Expertise, both subject and functional, is currently widely distributed across the Libraries and it will continue to be so. Subject expertise will continue to reside primarily within Content Development, for the purpose of building and maintaining collections. Functional expertise is distributed among several areas. The types of expertise and the distribution thereof are outlined below.

Content Development

- History
- Art (visual art and history of art) and architecture
- Music (performing arts)
- English literature

- Language proficiency (French, German, Italian)

Metadata, Data & Discovery Services

- Data
- Metadata

Research & Learning

- GIS
- Government documents
- Scholarly Communication & Copyright
- Statistics

Distinctive Collections

- Formats (archives, rare books, conservation of materials)
- Languages

INSTRUCTION

We will no longer approach course support with only a 'subject expertise' frame, but instead will begin with an analysis of what the research/information component of the course is (or could be). Every request for instruction will require a consultation that seeks answers to the following:

1. What is research/information need, regardless of the subject designation or course prefix?
2. What are the learning outcomes?
3. By what methods might the Libraries integrate and help achieve those learning outcomes?
4. Finally, determine whether disciplinary subject expertise or functional expertise is required to meaningfully contribute.
 - Is it an expertise that the professor/instructor can bring to bear through consultation? OR
 - Can a library colleague possessing a subject or functional expertise assist?

100-level courses (with the exception of UNIV 101, HNRS 190, and FYS 177 courses)

- In most cases, requests will be referred to LibGuides and online tutorials.

ENG 101/102

- New model of integration forthcoming: train the trainer in ENG 801/802 courses

Our strategic approach to instruction beyond the 100-level is currently under consideration and development. But, as noted above, subject and functional expertise will be sought as appropriate with these courses.

REFERRALS

Because the Libraries is shifting away from framing our services in terms of subject and discipline, the referral model will be recast and simplified over the course of summer 2014. If reference staff find themselves at a point of referral, they will refer based upon:

- Rare formats/collections—Spencer
- Selected languages—International Area Studies
- User population--Centers

Referrals for the purpose of problem-resolution (e.g., fines questions, e-resource problems) will continue to be directed to the parties charged with resolving those issues.

REFERENCE SERVICE in Watson and Anschutz Libraries

Due to declining number of questions posed and need to shift staff to strategic priorities, we are moving to a support staff and student model for providing direct research help in Anschutz and Watson. Anschutz and Watson Libraries will maintain a research help presence at the service desks. All Libraries faculty, as well as staff from Research and Learning, will be removed from reference service at the desks by summer 2014.

QUESTIONS

1. In terms of these recommendations, and from your perspective within the organization, how do you think this transition can be best facilitated? What do you need in order to successfully make this transition?
2. Given that we are shifting from framing our services in terms of subject and discipline, how do you believe the Libraries can best manage the development and maintenance of LibGuides?
3. We recognize that some reference and instruction work may require specialized subject knowledge, due to the complexity of the associated resources. How can the Libraries manage this potential need, understanding the scope of subject expertise in the organization?



ORGANIZATIONAL RECOMMENDATIONS

RESEARCH AND LEARNING DIVISION*Liaison Model*

Some two years ago in June 2011, the consultants retained by the libraries noted, “The liaison role is not well defined, nor does staff view it as flexible. While a variety of approaches exist, mixed results in faculty outreach coupled with communicating the results of that outreach, hamper organizational effectiveness” (Lougee and Luce, 2011).

The consultants also noted there was “uneven engagement” among liaisons and departments and that greater “clarity was needed for position definitions...” (Lougee and Luce, 2011, p. 3).

Not long after the consultants' report was submitted, an internal libraries task force was formed called *Connecting to KU Teaching & Research Departments*, which submitted recommendations to the libraries' administration in September 2010. That report recognized the libraries deliver services to departments along a “continuum of multiple [liaison] models,” but assessment of the libraries' efforts revealed several service gaps that warranted greater attention. For example, the task force noted the libraries' use aspects of the “traditional departmental liaison model,” the “embedded knowledge model,” and the “resource team model,” none of which delivered a full suite of services to teaching and research departments on campus (*Connecting to KU...*, 2010, pp. 5-7). Indeed, several gaps in the models used to serve departments were noted, including these:

- knowledge of scholarly communications and trends
- instruction and research support
- data/collections resources and services
- assessment
- technology skills
- marketing/outreach

While “next steps” were proposed to address such gaps, no further action was taken at that time. Subsequently, there was no organizational consensus reached regarding the role of subject liaisons following either the consultants visit or the work of the internal task force.

Mindful of these efforts, ORT discussed the notion of liaisons and liaison models several times during the fall semester. It should be noted, however, that ORT had only three library faculty as members, not all of whom currently serve as traditional “liaisons.” Focus group discussions did not add much clarity to questions surrounding the current liaison model, and the team did not reach consensus regarding whether or not subject specialist designations should be retained in the newly proposed structure.

Notwithstanding that, ORT recommends the designation “liaison” be discontinued and that a new model of outreach be considered and renamed. It may be advisable, for example, to refer to these specialists as “consultants” or some other name. The term “liaison” is based on an older model that stressed collection development, reference, and instruction as the primary responsibilities of all liaisons, no matter the discipline served. Within this context, liaisons were assigned specific disciplines to serve and developed established and formal relationships with departments, schools, or centers across campus. At times, these units work closely with faculty assigned as their library liaison (not all academic units have faculty liaisons).



ORGANIZATIONAL RECOMMENDATIONS

It is true this has aided immensely in the establishment of positive relations with faculty, albeit in an inconsistent way. It is also true that librarians have often formed a close identification with the departments and disciplines they serve. In our current milieu, however, ORT believes our needs have rendered this arrangement insufficient to meet contemporary user expectations. Even now, for example, this model has been informally modified; while most liaisons continue to teach, a cohort of librarians designated as liaisons no longer perform either collection development work and/or reference duties at either Anschutz or Watson service desks, instead preferring to specialize in other areas (such as instruction). Other librarians who perform extensive outreach and instruction with a variety of faculty are not officially considered "liaisons" since they have no formal affiliation with academic units on campus. This is true of the library faculty in CDS, for example.

Our current model, created a number of years ago, has not evolved in parallel with the needs of our users. It is largely uneven in how it is approached by liaisons themselves and in the expectations placed upon individual liaisons by faculty supervisors. It is, in short, a model that is no longer sustainable.

As ORT discussed these issues, the team began to realize librarians and staff must be realigned and become more conversant in 21st century fluencies required for the job. Many of these characteristics were noted by both the consultants and the libraries' own task force created over two years ago. Emphasis should be placed more heavily on building relationships, not strictly on functions to be performed within a narrow range of choices. There exists now the real possibility to build cross-functional teams that better serve our users. The idea of "embedded" librarians involved in both teaching and research, for example, is one idea that could be further developed, but this will require greater explication and could influence whether some subject specialist designations be retained (Schumaker, 2012).

In light of these observations, ORT recognizes the following scenarios could exist:

- Subject specialists could be retained with roles and expectations explicitly defined.
- Subject specialists could be retained for the professional schools (e.g., engineering, social welfare, education, business, journalism, etc.). In addition, librarians in International Area Studies (IAS) should continue to be considered specialists in line with extant university centers on campus, such as those for East Asian and Latin American Studies.
- Current subject specialists could be distributed across the spectrum of administrative units and teams based on preference and need, or those with current subject specialization could be tapped to continue to teach upper-level courses in areas they now do (viz., political science, history, psychology, and so on).

ORT recommends that we at least define responsibilities within the structure proposed in this report: librarians and staff be redistributed to various departments and units (or centers and teams) within Research and Learning, Content Discovery and Access, and Assessment Services, for example. This will better support the activities and priorities that comprise the strategic plan.

As has been noted in the library literature, realignment along the lines we suggest "will have significant implications for the library's staffing profile and workforce skill set" (Luce, 2008). An explicit and ongoing effort should be enacted to enable current library staff in all relevant areas to learn and develop the skills and expertise required to support research and learning in the today's environment.



ORGANIZATIONAL RECOMMENDATIONS

User-based Approach

Currently, the functions of research support, teaching support, and learning support are all handled separately and with little coordination amongst them within the libraries. There is a focus on library functions and workflows or library services, rather than a more explicit focus on the user and user support. Libraries are uniquely situated to build research and learning communities that are multidisciplinary and reach across and beyond institutional boundaries. ORT recommends a user-based structure that echos our commitment to integrating KU Libraries into the academic life of scholars and students--not the other way around (i.e., the traditional model whereby scholars and students must find ways to integrate with the libraries).

The Research and Learning division (R&L) will be comprised of librarians and library staff who possess expertise in a range of areas and topics related to resource discovery and use, teaching and learning, and research. These faculty and staff will provide support to our major constituencies on campus in each of these areas based on distinct user needs, skills, and experiences. These librarians will engage users and build relationships based on both the commonalities and differences that exist among these constituencies. This support will require engaging fundamentally in the lives of students, scholars, and citizens to improve individual productivity and further their academic goals, as well as the mission of the university. "An engagement model is a model that seeks to enhance scholar productivity, empower learners, and integrate libraries into the research, teaching, and learning processes" (Williams, 2009).

Compared to our current organizational structure, the integration of instruction- and research-focused services into one division will exemplify that research and learning are not independent and distinct activities, but two interrelated aspects of the larger scholarly enterprise. As noted above, CDS is engaging in an increasing number of instructional activities with faculty and students, and issues such as open access, scholarly communication, and digital scholarship should be a part of the information literacies of undergraduates, graduates, and researchers. Similarly, it is with increasing frequency that library and research instruction lead to questions and conversations related to copyright, fair use, and the rapidly changing resource and information environment.

Why a user-focused, team-based structure?

A user-focused, cross-functional team-based, organizational structure presents a number of advantages.

Academic institutions distinguish among undergraduates, graduates, and faculty in nearly every respect, and these groupings are not likely to change on the whole. There is a reason for this: each possesses distinct characteristics, skills, and needs.

- **Undergraduates:** are primarily students and novice researchers
- **Graduates:** represent a mix of advanced students, advanced researchers/scholars, and some are also teachers
- **Faculty:** are primarily teachers and expert researchers/scholars
- **Community:** represent a mixed group of local, state, regional, and international users with a variety of information and research needs



ORGANIZATIONAL RECOMMENDATIONS

A user-focused Research and Learning division organized around these four user groups will be a bold break from a (very) traditional organizational structure that has “focused largely on capturing the end products of scholarship and a bibliographer model designed to fulfill that goal” (Williams, 2009). This traditional structure has also made us less agile and less responsive to evolving student learning outcomes, student and faculty research processes, and scholarly communication practices (Hahn, 2009). A user-based focus will bring users to the fore of our attention and may lead to critical strategic opportunities to participate in and influence a variety of campus decisions. It will emphasize our interest in building relationships, explicitly requiring agility and responsiveness, and will best situate us to demonstrate the value and contribution we make to the research, teaching, and learning experiences of our users.

Building strong relationships with faculty and other campus professionals, and establishing collaborative partnerships within and across institutions will be necessary building blocks to our success. Subject knowledge, such as liaisons possess, can be used to inform much more than the selection of books and journals, and teaching the occasional guest lecture. Knowing how scholars in particular disciplines communicate and share information with one another can inform the design and development of repository and new model publishing services. Understanding the curriculum of a degree program and pedagogical norms of a discipline can help shape the development of scalable models that integrate 21st century literacies into a learner’s universe. Knowing that many scholars are generating untold quantities of digital data while others are producing multimedia works and all are struggling with data management and preservation plans positions us to help craft solutions to these large-scale problems (Williams and Jaguscewski, 2012).

We also believe an organization based around user needs and cross-functional teams will make the most effective use of our expert human resources and eliminate several areas of duplication of effort. Given a sure future of limited resources, this is a model in which we can be very effective. A team-based approach to our functional work means we can take advantage of the natural strengths and interests of our staff while not expecting that each individual librarian acquire new specialized skills or expertise in specific areas.

[Librarians] cannot be experts themselves in each new capability, but knowing when to call in a colleague, or how to describe appropriate expert capabilities to faculty, will be key. . . Just as researchers are often working in teams to leverage compatible expertise, . . . librarians will need to be team builders among library experts [where this supports and enhances the research, teaching, and learning on our campus] (Hahn, 2009).

Cross-functional teams also reflect the true nature of our work. While this kind of collaboration currently happens in an ad hoc way (with varying degrees of success), a user-focused structure that utilizes cross-functional teams would provide a structure clearly and explicitly intended to break down our current ‘silos’ or tribal tendencies and support the kind of ongoing and in-depth collaboration our work requires.

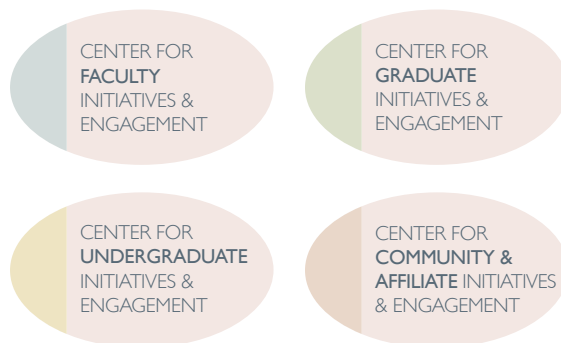
This kind of realignment is also a strategic response to economic realities and pressures. In realigning the libraries’ priorities and structuring our focus on the changing needs of faculty and students, we will better equip ourselves to meet current and future needs, and will be best situated to demonstrate direct value and contribution to the research, teaching, and learning experiences of our users.



ORGANIZATIONAL RECOMMENDATIONS

Centers

We recommend a user-based structure for the R&L division comprised of four centers overseeing a number of cross-functional teams. The centers will provide vision, oversight, and coordination to the teams, with an emphasis on engagement and support. They will need to allocate, shift, and share resources (including staff time) among each other, as functional needs will overlap. We recommend director-level leadership of these centers. The center directors will need to collaboratively ensure that user needs are being met and user support is provided efficiently and effectively. Centers are listed below, then described in more detail in the following section:



The Center for Faculty Initiatives and Engagement

Faculty...are the single greatest challenge facing the modern research and academic library. Without faculty support and understanding and without their regular collaboration with librarians, the research library will not survive. It may remain as an interesting museum piece or storage facility, but it will no longer be the heart of the institution.

But the opposite is also true: If we can get faculty and scholars to be willing and eager collaborators with librarians in their course development, teaching, and research, then we will have guaranteed the active and irreplaceable role of the library in higher education, no matter how many books are digitized or how much shelf space is given over to cafés.

Sadly, the exclusion of librarians in both undergraduate course development and advanced scholarship has created a climate in which librarians find themselves struggling to explain their role in research and teaching even to university administrators (Rentfrow, 2008).

The Center for Faculty Initiatives and Engagement will focus on supporting KU's faculty and research community, including KU's research centers, through collaboration and engagement in teaching and research support. Our user-based approach will help KU Libraries develop and articulate its role in supporting the research and teaching within the university. This center (in close collaboration with other centers) will provide higher level coordination and resources to support specialized and cross-functional teams in areas such as Research Data and GIS Services, Digital Research and Publishing, and Scholarly Communications and Copyright.



ORGANIZATIONAL RECOMMENDATIONS

The Center for Graduate Initiatives and Engagement

The Center for Graduate Initiatives and Engagement will focus on the libraries' integration with graduate students in their roles as advanced students, researchers, teachers, and academics and professionals in training. Graduate student needs overlap with both undergraduates and faculty, and they have their own unique situation as early career (or soon-to-be) academics and professionals. This center will engage with the needs of graduate students to ensure that they develop skills and knowledge about not only where to find information and how to evaluate it, but also about how to extract and then manipulate the material they find.

Working in conjunction with graduate students' programs and departments, the center will also provide hands-on experience through internships, employment, project-based initiatives, and other opportunities. The libraries provides a rich environment for the type of "field" experience that graduate curriculums in the humanities find increasingly valuable. Through collaborative, real-world projects, the libraries can provide students opportunities to contribute to scholarly projects and build skills in areas such as digital humanities, interdisciplinary team-based work, and teaching. Such an initiative would increase KU Libraries' viability by strengthening our connection to the larger KU graduate curriculum, building the skills and qualifications of the students graduating from KU, and clearly demonstrating our long-term value to the university.

The Center for Graduate Initiatives and Engagement will allow KU Libraries to focus on these initiatives to a far greater degree, and with far greater coordination, than we have been able to do up to this point.

The Center for Undergraduate Initiatives and Engagement

The Center for Undergraduate Initiatives and Engagement will focus on supporting undergraduate teaching and learning through collaboration with teaching faculty and first-year experience offices, and through the design of undergraduate programs and outreach from the libraries. KU has made a commitment to the undergraduate experience in *Bold Aspirations*, and the Center for Undergraduate Initiatives and Engagement will ensure that KU Libraries develops and articulates its role in supporting that commitment. Further, the libraries' strategic plan also calls for the coordination of efforts in support of undergraduate teaching and learning. This center (in close collaboration with other centers) will provide high level coordination and resources to support specialized and cross-functional teams such as Course and Curriculum Integration/ Teaching Support; Outreach; Online and Distance Learning Support; Discovery, Access, and Use; Student Learning Support; and First Year Experience Initiatives.

The Center for Community and Affiliate Initiatives and Engagement

The Center for Community and Affiliate Initiatives and Engagement will focus on supporting the varied needs of our community members and KU affiliates. Presently, this kind of engagement is not done in any organized or coordinated manner. This center will ensure that we are considering the needs of our users, regardless of location. *Bold Aspirations* calls upon members of the KU community to reach out to our fellow Kansans in a variety of ways, but also to raise our collective profile at the national and international levels. Through collaboration with alumni, the *KU Works for Kansas* initiative, and our colleagues at other Kansas institutes of higher education, this center will develop partnerships and provide the necessary resources and services to these community members and affiliates. This center (in close collaboration with other centers) will provide high level coordination and resources to support specialized and cross-functional teams in areas such as Outreach; Online and Distance Learning Support; and Discovery, Access, and Use.

UMass Amherst Libraries Librarian Engagement Framework: moving forward

The Liaison Advisory Council (“LAC”) developed the attached document over the past couple of months. The purpose of it is to serve as an internal document to guide UMass librarians. The Framework intentionally broadens staff involved in what we currently refer to as the “Liaison Program” because the suite of services and expertise the Libraries offers has grown beyond the ‘liaison program’ paradigm as it has been described up to this point

Librarians have had the opportunity to review and comment on the document. When reviewing it, librarians were asked to note if their work activities are reflected in the document—and if not to inform the LAC so they may be added. Numerous additions and revisions have been made based on the feedback received, with the goal that all UMass Amherst librarians will see themselves in the Framework.

The document will serve as a guide for the Librarian Engagement Framework, once SMG has approved it. It will be reviewed on a yearly basis by the LAC.

Members of Liaison Advisory Council:

Marilyn Billings
Leslie Button
Carol Connare
Rob Cox
Kate Freedman
Beth Lang (co-chair)
Maxine Schmidt (co-chair)
Brian Shelburne
Gabe Stetson
Christine Turner

The UMass Amherst Libraries Librarian Engagement Framework

UMass Amherst Libraries Liaison Program: moving forward

The Liaison Advisory Council (“LAC”) developed this document to serve as an internal guide to UMass Librarians who serve in what we currently refer to as the **Liaison Program**.

The new name of this specific group, now to be called the **Librarian Engagement Program**, reflects the Library’s goal to reach out and to actively participate in supporting teaching, learning, and research efforts across the University campus. It is our intention, as well, that all UMass Amherst librarians and staff will see themselves and their roles described to some extent, somewhere in this document; that all will identify with the values articulated here and will participate, to the extent that is appropriate, in the broad range of activities described.

Background

Academic libraries have become more complex, offering services that are more diverse and responsive to the significant changes that are affecting higher education. Academic libraries have re-oriented the subject specialist/liaison librarian cohort from the traditional collections-focused role to a teaching/learning and research enterprise role. This new model requires a more collaborative, engaged approach that builds on expertise from across *all units* in the UMass Amherst Libraries (Libraries) to blend librarian expertise more integrally into the teaching/learning workflow, institutional objectives, and research practices of scholars, researchers, and students.

While we continue to provide traditional library support to faculty and students, we also now assist users in interpreting the increasingly complex information infrastructure, of which the Libraries are part. We are already actively engaged in the teaching, learning, and research enterprise. In so doing, we play an important role in facilitating collaboration and collective action across disciplinary and institutional boundaries.

Framework Purpose and Structure

The Framework foci below are intended as both a guide and a toolkit for librarians serving the UMass Amherst community, defined as faculty, students, staff, and citizens of the Commonwealth. It describes prospective librarian roles based on the Libraries’ and the University’s strategic plans. Librarians are expected to use the Framework foci as a guide to identify opportunities, priorities, and specific activities for respective constituencies.

The document consists of two main sections: the Values and the Outline. The Values apply to all librarians, regardless of home department or functional role. The Outline describes responsibilities and expectations along with ‘best practice examples’ to inform implementation strategies for core engagement activities. These ‘best practice examples’ are not comprehensive. The purpose of the Outline is to both give ideas about how to implement the program, and to show how the work of the various departments are all integral to Librarian Engagement Framework..

The Liaison Advisory Committee, charged to review new and existing librarian engagement assignments, will take librarian expertise and preferences into consideration in making such assignments. It should be noted though, that decisions about the requirements of the librarian's role are made first and foremost because of organizational needs. Personal preferences, therefore, cannot always be satisfied.

Framework Values

Librarianship is collaborative by nature. The Libraries are an important hub, serving as the intellectual nexus of the campus, engaging with our communities, and connecting them to a wealth of resources and services, and to one another. Collections and services evolve through collaborations and relationships. Above all, this Framework is dedicated to outreach, advocacy, and engagement, supporting the campus goal of making UMass Amherst a destination and investment of choice. The values that inform this Program include:

- **Commitment to people**, to a diversity of ideas, groups, and individuals, and to the communities that comprise the University of Massachusetts and the Commonwealth
- **Commitment to knowledge**, intellectual freedom, life-long learning, and the principles of higher education
- **Commitment to our profession**, placing a value on our integrity, high level of service, and our professional values and ethics
- **Commitment to one another**, expressed through an inclusive and collaborative work environment that prizes flexibility, innovation, creativity, personal initiative, and persistence.
- **Commitment to embracing change** by seeking out, learning about, and trying out new ideas and technologies, in order to enrich and improve the education experience of our community and ourselves.

Framework Outline

Outreach, advocacy, and engagement are the guiding principles and overarching foci of the Framework and are expected of *all librarians*. Responsibilities and core activities include:

- Initiating and facilitating ongoing dialog with faculty and students about resource needs and service expectations.
- Communicating regularly with faculty, students, and staff to develop and maintain strong and productive working relationships.
- Speaking knowledgeably about and promoting library services and issues.
- Keeping current on curricular initiatives and proposed programmatic changes.
- Working closely with faculty and students to understand their changing workflows and patterns of scholarly communication.
- Using data to inform support for faculty and students

Best practice examples:

- Meeting regularly (at least once per semester) with faculty in assigned areas.
- Participating in department meetings, activities, and events such as seminars, colloquia, and conferences.
- Seeking professional development opportunities in areas of specialization (e.g., participating in scholarly societies and associations).

- Partnering with researchers on projects and/or grants.
- Participating in departmental, college, institute and campus committees.
- Sharing information concerning colleges, departments, programs, institutes/centers, faculty senate, and other relevant organizations (i.e., Five Colleges, Boston Library Consortium, etc.) with library colleagues.
- Engaging in scholarly pursuits through research and coursework
- Reviewing and using library data relevant to assigned areas.

Additional **priorities** are outlined below. As always, librarians and their supervisor will develop priorities based on departmental and individual goals and the strategic goals of the Libraries. The priorities articulate a wide range of potential activities depending on the librarian's assignment(s).

1. Teaching and learning: Design and deliver pedagogically appropriate instruction for library users that supports University curricula and learning outcomes. Responsibilities and core activities include:

- Engaging with faculty and teaching assistants/associates in programmatically integrating metaliteracy¹ concepts into the curriculum.
- Delivering and assessing effective instructional sessions². Use sound instructional design practice to develop learning materials and instructional programs.
- Engaging in reflective teaching through the use of instructional improvement tools such as peer evaluation or teaching portfolios. Participate in Center for Teaching and Faculty Development (CTFD), IT Academic Computing, and other professional development programs to improve instructional and assessment techniques.
- Analyzing current teaching and research trends and materials in assigned department(s).

Best practice examples:

- Examining the schedule of classes each semester to identify foundational, research methods, and capstone courses; contacting appropriate faculty to discuss how the Libraries can improve programmatic support.
- Instructing or co-instructing research methods courses.
- Meeting with departmental undergraduate and graduate program directors on a regular basis to keep current on instructional changes and needs.
- Keeping current with new pedagogical techniques.

¹ According to Thomas P. Mackey and Trudi Jacobson, "Metaliteracy is an overarching and self-referential framework that integrates emerging technologies and unifies multiple literacy types," for example, information literacy, visual literacy, media literacy, etc. For more in-depth coverage of this subject, see: "[Reframing Information Literacy as a Metaliteracy](#)," an article by Thomas P. Mackey and Trudi E. Jacobson, which was published in the January 2011 issue of *College & Research Libraries*.

² Instructional sessions includes classroom sessions and individual research consultations.

- Creating student learning outcomes for library instruction sessions, using assessment methods to evaluate student learning, and using results to improve instruction.
- Collaborating with other campus partners to ensure that online course and subject guides are integrated into learning management systems.

2. Research and client services: Provide in-depth, specialized consultations and workshops for users. Responsibilities and core activities include:

- Offering expert assistance to users.
- Developing user capabilities with finding, evaluating, and using information and pertinent technologies.
- Providing assistance and consultations in using specialized databases, citation management, data services, copyright, metadata schema, digital preservation, finding aids, and other library research tools.
- Assisting with accreditation preparation and benchmarking activities
- Documenting and analyzing data on service transactions.
- Contributing to the identification of user needs and the measurement of outcomes of reference, teaching, learning, and research services.
- Assisting with the preparation of grant applications and systematically reviewing the literature
- Providing assistance and consultations in multimedia production and support of technologies available through the libraries.

Best practice examples:

- Participating in staffing email, chat, and other virtual services or service desks as appropriate
- Holding office hours in a department, centers, and institutes.
- Supporting use of citation management products (e.g., *RefWorks*).
- Partnering with data producers and repository contributors to help manage, disseminate, and curate research data.
- Holding workshops to teach members of the UMass community how to use various library technologies and tools.

3. Content management and scholarly communication : Develop, manage, and curate collections to support teaching, learning and research. Responsibilities and core activities include:

- Selecting, acquiring, and managing content in assigned subject and functional areas.
- Strategically assessing and making data informed decisions regarding the acquisition, retention, and preservation of content
- Collaborating with appropriate library staff on arrangement, description, cataloging, and provision of access to content.
- Assisting in content recruitment and identifying digital resources that require long-term preservation and merit sustained access.

Best practice examples:

- Selecting, describing and making accessible 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 UMass Amherst clientele.
- Analyzing ILL borrowing to inform changes to approval plans, demand driven acquisitions profiles and collection practices, and note trends in user resource needs.
- Educating faculty and graduate students about their rights as authors (e.g., that they can alter contracts to include retaining rights to distribute their own work in classes and on personal websites).
- Advocating with authors and editors for sustainable models of scholarly communication.
- Keeping current with research in disciplines and areas of study and communicating emerging trends in modes of scholarship with library colleagues.
- Making faculty and graduate students aware of alternative publication models in their discipline.
- Serving as a liaison between the IR and campus constituents in colleges, departments and institutes to foster adoption of the IR as a scholarly communication tool.
- Working actively to recruit and make discoverable the scholarly output of the UMass Amherst and/or local community
- Working actively to recruit and make discoverable unique and rare resources, regardless of format.
- Understanding basic copyright principles and recognizing basic areas of application (e.g., fair use scenarios and face-to-face teaching exemptions).
- Educating faculty, graduate students, and campus administrators about scholarly communication issues.
- Working closely with faculty and students to understand their changing workflows and scholarly communications patterns; assist in the development and creation of tools and services to facilitate scholarly communication.

Endorsed by the Senior Management Group, May 7, 2015

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