Professional Development
Change It Up: Growing Your Career in a Wildly Different Organization

Betsy Appleton, Electronic Resources Librarian, St. Edward’s University

Tina Herman Buck, Electronic Resources Librarian, University of Central Florida

Carol Seiler, Account Services Manager, EBSCO Information Services

Abstract:

The authors have worked in academic libraries (large and small, public and private); for library vendors; and in public libraries of varying sizes. This paper discusses their perspectives on the opportunities, surprises, and lessons learned via a substantial change in organizational type, structure, and/or size. In addition, ideas for evaluating job applicants with experience in a much different setting are provided.

Paths to Today

Tina: I’ve been a technical services librarian throughout my career, in public libraries of varying sizes, in a regional service center that served all types of libraries, and in academia. For nine years, I was the technical services librarian at a small, private university with a full-time equivalent (FTE) of 4,700. The library had 15 employees and a technical services department of four. I worked with monographic materials in all formats, including acquisitions, cataloging, and record-loading, plus heavy involvement with the integrated library system (ILS) and the discovery layer.

I gained soft skills such as organizational leadership from the middle: I was accountable for processes that required the actions of colleagues. The scope of job was narrow, as I only completed portions of the electronic resources life cycle myself. However, the scale of the job was enormous. I had responsibilities for nearly 1,000 databases, all e-book collections, and all streaming media. I negotiated or re-negotiated about 80 to 90 licenses a year.

Toward the end of those nine years, I knew that job inside and out, as well as much of the work of my fellow tech services librarians, but there were gaps in my knowledge and experience. Therefore, when I started looking for a new position, I sought out significant learning, growth, and a new kind of environment rather than a larger version of what I had.

I am now an electronic resources librarian at a very large state university, with a total student population of 63,000 and an FTE of about 39,000. There are differences between my current institution and previous ones, but my past experience—in different types and sizes of libraries—has prepared me well for this job.

Betsy: My early career experience is mostly in a large academic library. I spent four years learning basic electronic resource librarianship skills, including licensing and state contracting and procurement, acquisitions, knowledge base management, and managing work flow among several positions in a variety of different departments.

I was ready for change for two reasons. First, I outgrew the narrow scope of the position. Inspired by the NASIG Core Competencies for Electronic Resources Librarians, I realized that I had no write-access to systems in this position. If I wanted to focus my career in electronic resources, I required more experience in those systems than I could gain in a narrowly scoped position. Second, I outgrew being the only remote staff member in the organization. I moved to Austin four years into my six at this Virginia organization. This move initially provided me with more to learn in terms of communication and management skills, but eventually the energy required to preclude isolation was considerable.

Carol: In graduate school, I worked on retrospective/reclassification projects and union listing as the library world moved to machine-readable cataloging (MARC) and Online Computer Library Center (OCLC). This helped me learn about the cataloging as I matched up cards to records, traced back serials, and how to do complex holdings. This early training set me up extremely well for everything I’ve done since. Having the knowledge of how the base works enabled me to easily translate this to search skills and automation skills.
I have worked in public, academic-medical, consortia, and vendor. I have worked in cataloging, serials, acquisitions, automation, circulation, reference, and training. In each job, I picked up new skills and knowledge and built upon the knowledge I had. Most moves I’ve made in my career path have been lateral. I have repeated jobs a few times, working for the same company, library, or consortia more than once. Never burn the bridge!

**Opportunities at Larger Institutions**

*Betsy:* Bureaucracy sometimes works in your favor. Written, official policies can preclude confusion and promote consistency. For example, the flexible work policies in the large, overarching organization provided me the opportunity to telework once a week. Even though it was no secret that the library administration disliked telework in theory, they benefited from it in practice.

I had the opportunity to become an expert and a specialist. I learned licensing, negotiating, and budget management under ideal educational conditions: A large budget, a team of lawyers ready to assist me, and a wealth of knowledge from a fabulous accounts payable office.

*Tina:* Coming from a technical services department of four, I’m happy to have so many more colleagues, both in my department and across the universities’ libraries. In addition, we’re part of a statewide consortia, so there are colleagues at the other institutions as well as at our consortia hub. My small university library was independent and without strong connections to other libraries, so creating relationships with colleagues at other institutions was an individual pursuit.

The second opportunity that I’d like to mention is as much a product of institutional culture as size. There is an expectation that we will present and publish if we want to get promoted. Even for those uninterested in promotion, you’re expected and encouraged to pursue professional development and to serve on university and external committees. The professional development, scholarship, and service that I pursued at the small university was due to my own initiative and encouragement from a couple colleagues. There was no encouragement from the institution and not much from library administration.

**Opportunities at Smaller Institutions**

*Tina:* At the small library, I enjoyed being able to work a whole process from start to finish and improve it until it was efficient and accomplished all the goals. For example, I could help the collection development librarian acquire a collection of e-books, write the load table for MARC records, load those records, handle the invoice, and track what we purchased. I knew when we needed to create new item types to reflect new formats and when we needed a new vendor record in the ILS and in the university’s ERP system, and I could make all those things happen. I saw the whole process through, and that was very satisfying to me.

On the flip side, in my first years at the small library, I was expected to do reference and be heavily involved in instruction in addition to my technical services roles. That let me see how things worked and gain perspective and experience, but ultimately, it left me spread too thin. As our electronic collections grew, I had to step away from public service in order to do justice to my primary responsibilities because I was the only person who could do that work. In a small institution, there’s a constant need for people to fulfill a variety of roles. That presents an opportunity but also a risk if you’re not monitoring yourself.

*Betsy:* There is less hierarchy. I can just do things. For example, in my first month, I negotiated, ordered, paid, and activated a new resource in **three days**. That is unheard of in a larger public organization and essentially impossible due to contracting guidelines and the number of people required to handle each document.

Fewer people need to come to consensus for decisions, so I have more control regarding my work. For example, I made a unilateral decision to change the way we reported print usage data recently. It required communication to the three people after I made the decision.

**Opportunities with Vendors**

*Carol:* There are several types of vendors. Consortia could be considered “vendor-light”—several consortia exist to help libraries. They are often very small-staffed and tightly budgeted. EBSCO is the only vendor that has the position I have: Account
services. My job is to ensure the customers are getting what they need, to prevent and/or resolve any issues, and to train and provide detail on all the services that come with your purchase. EBSCO, and other vendors, also have trainers, catalogers, technical support, and developers.

Generally, you have more resources with a vendor, but you must be able to justify why you need that resource. In every corporate environment, you have structure and policies. I tend to have to do more reporting, such as expense reports and notes about what happened with a meeting or issue, than I did in any library.

I am both a generalist and a specialist. I need to know the requirements for different types of libraries in different states. Additionally, I need to have a broader knowledge of libraries in general and how my piece fits into their library.

You are your company. When I visit a customer or see someone at a convention, they see EBSCO rather than me as an individual.

Most vendors encourage their staff, especially librarians, to be active in library organizations. I am always seeking out ways I can participate by serving on committees or speaking at conferences.

**Changes in Moving From Small to Large**

*Betsy:* Expect communication changes. Things you decided and ran with may need to be studied by a task force. For example, when I started at the larger institution, I made what I thought was a slight change to a fund designation for journal packages to better align them with a usage metric I wanted to use. That change confused several colleagues across many departments. I ended up rolling it back.

Seek out all departments, and find out what they do. A great supervisor had our department interview every other department in the library. I highly recommend this in any new environment, regardless of size or type. It helped me understand what others do and how my position fit.

*Tina:* At a small place, you run into everyone every day. In a large place, you have to make an effort to know colleagues who are outside your department because you’re less likely to interact with them.

Likewise, at my large library, a lot happens that I don’t know about. I need to make an effort to be aware of events, even at a superficial level. At the small library, I knew about most of what was going on because almost everything came up at every meeting, and almost everyone attended every meeting.

Another significant change for me has been adjusting to the size and the scope of the libraries’ collections and of the variety of what’s being studied at the institution. It dwarfs anything I’ve known before.

**Changes in Moving From Large to Small**

*Tina:* In a smaller institution, you may have fewer resources. Here are three examples:

- You may not have a legal department to help with contracts.
- You may not have scholarly communications support. My small library often struggled with copyright and fair use questions.
- You may have to serve on a search committee every year. In nine years, I was on nine or 10 search committees, and I chaired most of them, with very little human resources guidance or support. I had quite an opportunity to choose my colleagues, and I learned a lot about crafting a good cover letter and resume, but the time commitment was overwhelming.

*Betsy:* There is less need for consensus among your colleagues to make decisions or changes. If the decision is in your area and doesn’t directly impact someone else’s day-to-day routines, just do it. When you complete a process from start to finish, no one really cares about the “how” as long as it is done well.

You will be asked to do things that in a larger institution would have been fielded by experts. At the large organization, there was a chemistry liaison librarian with a master’s in chemistry and a wealth of expertise. In the smaller organization, I’m the natural sciences liaison, and when asked to teach a series of chemistry research classes, I’m the one who has to deliver. This can be daunting, but it is also fun. I’m learning more about instruction than I would have if I had remained in a larger institution.
Changes in Moving From Library to Vendor

Carol: Depending on the position, you may be working in an office or at home. You may also be traveling a great deal. You need to feel secure with traveling alone and staying in a variety of hotels. With working from home or on the road, you need to be able to work independently. You need to be comfortable being alone. You need to be self-disciplined, organized, and have follow-through.

If you work for any vendor in any aspect, you are part of sales. You represent your company wherever you go and whatever you do in the library community (posting on list-servs or serving on committees). You need to be cognizant and act accordingly.

Then, of course, is the corporate environment. It moves rather faster than the academic library. Decisions are much quicker, and changes in structure occur often. Be flexible and adaptable.

Transitioning to a Different Type

Tina: For technical services positions, I think transitioning to a different type of library is about skills and being willing to learn new ways to apply those skills. If you know, for instance, cataloging, acquisitions, or e-resource management, then you can do that in another type of library. The priorities will differ, and the types of resources you’ll work with will differ, but the skills transfer. Your task is to ask questions about the priorities and about the larger context until you’re fluent in your new environment. Don’t assume that you know what is important.

Carol: Just like moving from one type of library to another, when applying to work for a vendor, all the skills you learned in the library will be useful. When I got my job at the medical library, I had no medical experience. I did have lots of experience training. I had all sorts of technical skills as well as search skills. The director wanted someone who had this. She didn’t worry that I had never searched medical databases and did not know the terminology. She said, and I agree, if you know how to search, you can learn the terminology. Working for a vendor, my inside knowledge from working in a variety of libraries and positions has helped tremendously in understanding and communication with customers.

Betsy: I made the case for remote work at a time that made a lot of sense for both me and my organization. Among the things that made it work:

1. We clearly delineated responsibilities in a formal agreement, such as working hours, equipment, who-pays-for-what, and back-up technologies that would be used should something break.

2. I quickly and proactively addressed the minor resistance to my working off-site by modeling the behavior/habits I wanted my on-site colleagues to adopt. If someone didn’t want to bother me during my working hours, I made a point to contact them the way they should have contacted me.

3. Focus on the advantages to the organization. I didn’t get snow days when there were blizzards at that university, so there was some continuity of operations during closures each winter. We also became accidental experts in videoconferencing technologies, which enabled our consortia partners to attend more meetings without unnecessary travel.

4. Stick to your scheduled hours as much as you can. Resist the urge to finish a loose end that you would have left for tomorrow if you were on-site, or you may burn out and create impossible expectations for yourself.

Observations for going back to on-site work:

1. Remind yourself to talk to your colleagues. The email-the-person-next-door impulse was very strong the first few months. Resist it!

2. It takes some time to get used to the rhythms of working in an office again. For example, if your kitchen is steps away from your home office, you may not realize you graze all day.

3. I learned how to ignore office drama while working remotely. Now that I habitually stopped caring about that stuff, I still don’t take it personally.
Evaluating Applicants With a Very Different Background

Tina: I’ve changed types and size of libraries a few times. So why did my current library recognize my potential while other search committees seemed spooked by a candidate who was coming from a different kind of place? For example, in my latest job search, I interviewed with a big research library who obviously didn’t want someone who wasn’t coming from a big research library. I interviewed at an urban public that was uneasy about someone who wasn’t currently at an urban public, even though I’d done that in earlier years. This isn’t to say that I was the perfect candidate for either of those jobs, but it came through clearly in the interviews that my immediate background in a different kind of institution was an issue. I think that there is a natural bias toward people who are like you, and it’s worth making a conscious decision about whether that’s a valid or necessary filter, every time you fill a position.

Look for someone who has seized opportunities to learn and grow beyond the basic definition of their job title, and who can engage with you in a discussion about the work even if the details are different. Many of my experiences at the small library and in my public library life have translated very well to my current position. I think having people with different work experiences is as valuable as having people who are diverse in other ways.

Betsy: The smaller institution isn’t as different from the larger institution as it sometimes thinks it is. I’ve had to disprove assumptions that I wouldn’t be able to achieve success in contract negotiation without a large budget. I know how to ask for what we want in a way that a vendor can deliver, thanks to my expertise gained at the larger institution.

Let’s strike “cultural fit” from our vocabularies. New staff should not “fit” in our libraries. We extend the organizational culture in a new and useful way. Will the candidate you are considering bring something that your organizational culture is currently missing? For more thoughts about this idea, see Meredith Farkas’s September 2015 blog post about this topic.

References


A Tale of Two Liaison Programs: University of Central Florida Libraries and Louisiana State University Libraries Partnering for Subject Librarian Excellence

Barbara G. Tierney, Head of Research and Information Services, University of Central Florida Libraries

Lois Kuyper-Rushing, Associate Dean for Public Service, Louisiana State University Libraries

Abstract

Are you considering establishing a new or re-invigorated subject liaison program in your library but don't know how to begin? Why not partner with an established liaison program at another library?

Throughout the spring and fall of 2015, key public service managers at Louisiana State University (LSU) Libraries visited six Association of Southeastern Research Libraries (ASERL) to see, among other things, successful liaison programs. The LSU librarians were particularly impressed with the University of Central Florida (UCF) Libraries’ three-year-old reimagined subject librarian program. Following this visit, LSU managers began reworking their program by fine-tuning liaisons’ program assignments and creating a liaison training program that focused on academic program profiling, faculty profiling, curriculum mapping, curriculum integrated instruction, increased liaison visibility and accessibility, and proactive outreach to faculty and students.

In this article, public service heads from UCF and LSU discuss how their liaison programs are the same and how they differ, how librarians collaborated in finding new ways of reaching faculty, what the challenges are in their current programs, and what the future may hold. Hopefully, lessons learned by UCF and LSU will provide insight for other academic libraries wishing to create liaison programs designed to support student and faculty success at their own institutions. (Please see http://guides.ucf.edu/ucflsu for graphics.)

What's in a Title?

At UCF Libraries, liaison librarians are referred to as subject librarians. At LSU Libraries, they are referred to as subject specialists. Is there a difference?

Although UCF and LSU refer to these librarians by slightly different names, they are functioning as library liaisons to specific academic departments and colleges at both institutions. Within this article, when these librarians are discussed as a whole, they are called “liaison librarians”. When the authors refer to them within the UCF or LSU institution, the terms “subject librarian” for UCF and “subject specialist” for LSU are used.

How the UCF/LSU Partnership Began

During summer and fall 2015, two newly appointed LSU public service managers, Associate Dean for Public Services Lois Kuyper-Rushing and Head of Research and Instruction Services (RIS) Cristina Caminita, travelled to six Association of Research Libraries (ASERL) universities to experience various approaches to liaison programs.

Much was learned on these visits to other campuses. UCF’s subject librarian program offered a liaison librarian model that LSU sought to emulate. Following the trip to Orlando, LSU held summer workshops with its subject specialists, changing the focus from library-based reference services to a rigorous outreach program. The LSU program took off in its own direction fueled by the experience and expertise of the UCF program.

UCF Background Information

University of Central Florida is a large metropolitan research university in Orlando, FL, with 63,000+ students. UCF offers 93 bachelor’s, 84 master’s, and 31 doctoral degrees, with a heavy emphasis on fully online and mixed-mode courses.

In spring 2013, the UCF RIS department initiated a new subject librarian service model to increase positive impacts on student learning, faculty teaching and research, and scholarly communication initiatives. There was a new emphasis on outreach, with subject librarians becoming more mobile, getting out of the library building, and spending...
quality time visiting and communicating with their assigned academic departments and programs, faculty members, and students.

**LSU Background Information**

Louisiana State University is a large metropolitan research university in Baton Rouge, LA, with more than 31,000 students. It is a land-grant, sea-grant, and space-grant university that offers 72 bachelor’s, 70 master’s, and 46 doctoral degrees.

In response to a new direction taken by the incoming dean at the LSU Libraries, the subject specialists began a process of outreach to their communities in 2015. After the aforementioned trip to various libraries, the focus for LSU’s subject specialists moved from a passive, reactionary service to one that involved a more current approach, including greater librarian mobility, visibility, and spending time with faculty and students in their departments and classes.

**How Liaison Programs Are Alike**

The UCF and LSU programs have several similarities, many of which are basic components of the 21st-century library outreach model. In both programs, most liaison librarians serve large constituencies, either entire schools or multiple departments. Liaison librarians in both institutions are expected to provide the following services for their areas:

- various aspects of collection development and management
- outreach to faculty and students via newsletters, e-mail, participation in academic meetings, and orientations
- instruction classes/small group workshops, research consultations
- creation of online research guides
- marketing of relevant library resources and services

An important feature of both programs is that liaison librarians are expected to maintain a strong online presence that will promote accessibility by including their photos and contact information on the libraries’ website directory, database and research guide web pages, and newsletters.

It is important to both libraries that subject liaison work is appropriately assessed and evaluated by including these assignments in their job descriptions and annual evaluations. The ways each program accomplishes this assessment differs, but the intent is the same. By giving weight to this important job responsibility in the annual evaluation, librarians are held accountable and can be rewarded for their outreach work. Both programs hope to make this evaluation process more robust and meaningful in the future.

Both libraries depend on their liaisons to serve as conduits for connecting end-users with new or underutilized library resources (such as e-books and e-textbooks, databases, electronic journals, and scholarly digital collections) to ensure a robust return on investment for these costly resources. The liaisons at both institutions market their library’s resources via their e-newsletters, web-based research guides, library instruction sessions, and presentations at academic department and university-wide meetings and workshops. The UCF and the LSU programs include on-going training for these librarians. These are described in depth later in this paper.

**How Liaison Programs Are Different**

While highlighting the similarities between the programs, it is important to acknowledge and understand the differences between the programs. These differences arise from many factors, including academic program differences at each institution, historical and cultural precedent at each library, and differing responses to new programs. None of the differences are great, but they are worthy of description.

At UCF Libraries, most subject librarians report to the Head of RIS, although each is also evaluated by the Head of Collection Development and the Head of Instruction (Teaching and Engagement) with regard to collection development and instruction activities. LSU Libraries’ situation is similar but with a few differences. While a good number of subject specialists report to the Head of RIS, several have a primary home in another department. For this reason, the Associate Dean for Public Services works with the Head of RIS in directing the liaison program, and the Associate Dean contributes to each liaison’s evaluation regardless of their home department.
Each year, the UCF subject librarians work with the Head of RIS to create an updated annual assignment/position description (AAPD) and goals, with definite but annually alterable percentages assigned to outreach, instruction, collection development, reference desk, creative work and professional development, and service, as well as annual goals. The AAPD also serves as the template for a monthly activity report and an annual self-evaluation that each subject librarian submits to the Head of RIS, and the annual evaluation that the Head of RIS completes for each subject librarian.

At LSU, staffing and evaluation are structured more rigidly. Faculty are hired with job descriptions that are alterable, but this is done almost exclusively when positions change drastically. Annual changes would be cumbersome for LSU’s Human Resources. To tailor the subject specialists’ work to specific needs arising each year, liaison librarians work with the associate dean each year to create “liaison goals” that are used to direct the librarian’s work, and they are used in the yearly evaluation.

The UCF-AAPD outreach section encourages subject librarians to communicate scholarly communication information (as outlined by the scholarly communication librarian) to their assigned constituencies. The AAPD professional development section also encourages subject librarians to initiate or participate in scholarly presentations and publications relevant to their assigned duties.

While scholarly communication is important to the LSU Libraries, there are currently no specific goals for LSU subject specialists relating to these activities. Liaison librarians who are in tenure-track or tenured positions have research expectations that can be related to any of their personal research interests.

As is the trend in many research libraries, both UCF and LSU libraries are making efforts to reduce desk hours for liaison librarians. While their goals are similar, their solutions are varied.

UCF’s RIS department began tracking its desk traffic in 2010 using Springshare’s LibAnswers or Libanalytics (https://www.springshare.com/libanalytics/). Based on results gleaned from the collected data, in 2013 the UCF RIS department began employing several part-time librarians to staff the research desk on weekends, evenings, and afternoons, as well as to take on virtual reference hours. This allowed subject librarians to decrease their hours at the research desk and virtual reference. Presently, liaison librarians work four to six hours per week on the research desk, allowing them more time for outreach activities, scheduled research consultations, instruction, and collection development.

LSU’s RIS department began to record daily data concerning research desk traffic in 2014, also using Springshare’s products. Each question was coded on the Reference Effort Assessment Data (READ) scale (Gerlich, 2002) in which the question codes are defined as:

1. Answers that require no specialized knowledge, skill or expertise (e.g., directional queries).
2. Answers that require a minimal amount of knowledge (e.g., call number locations).
3. Answers that require specific reference resources (e.g., searching the online catalog or introductions to online searching).
4. Answers that require consultation of multiple resources or complex searching skills.
5. Answers that require substantial time and effort, often by a subject specialist.
6. Answers requiring a great deal of time an effort (e.g., in-depth faculty or PhD student questions).

The results of their data collection showed that 64% of research desk questions were coded as “1” (directional questions), 25% were scored as “2,” and 11% were assigned a score of “3” or higher. These results, showing that 89% of the questions at the desk traffic required little or no library training, led to reductions in hours of librarian coverage and staffing at the research desk. Desk hours for liaisons in RIS were reduced from six hours per librarian per week to an average of two hours per week. Simultaneously, liaisons began pursuing other means of supporting students and faculty using scheduled research consultations, instruction sessions for classes, and embedding in classes.

**Liaison Librarian Training**

The UCF Libraries’ RIS department, Office of Scholarly Communication (SC), and Information
Technology/Digital Initiatives (IT/DI) units work together to provide training for the subject librarians. The RIS department coordinates annual all-day retreats (Tierney. 2013, 2014, 2015, 2016), monthly RIS meetings, and an online subject librarian toolkit LibGuide to support the subject librarians’ various assignments. SC and IT/DI work closely with RIS to coordinate frequent training workshops for subject librarians. These training sessions usually take place in library classrooms, which makes it very convenient for the subject librarians to participate. Subject librarians also are encouraged to learn as much as possible about scholarly communication and institutional repository issues and initiatives. The UCF subject librarian toolkit is available here: http://guides.ucf.edu/subject-librarian-toolkit.

LSU Libraries subject specialists training program has been tailored each semester to meet current needs. The bi-weekly sessions during the fall semester of 2015, focused on mapping (departmental, faculty, and curriculum) and LibGuide training as subject specialists began vigorous liaison work.

Before classes began in January 2016, UCF librarian Barbara Tierney traveled to Louisiana for a day-long workshop with LSU subject specialists. Tierney led liaisons in small- and large-group discussions, resources and ideas were shared, and questions were answered. Liaisons were energized by learning from Tierney about her approach to the liaison librarian program and hearing first hand of the successes her librarians were enjoying during early years of developing programming for their constituencies.

During the spring semester of 2016, LSU Libraries experts spoke on various services the subject specialists are charged with promoting. Sessions on copyright compliance for faculty, digital commons, and ORCID were presented, with a session wrapping up collection development for the fiscal year.

The summer sessions 2016 were dedicated to three-hour workshops in which librarians discussed their various experiences or expertise in areas such as embedding in classes, advanced LibGuide techniques, newsletter development, and innovations in interlibrary loan.

The fall 2016 training schedule featured librarians who are doing groundbreaking work in offering free electronic textbooks to our students, collection development staff assigned to fill gaps in our collection, and further information was shared on our institutional repository.

Challenges of the Liaison Program

The two liaison programs share many of the same challenges, challenges that beset many librarians embarking on programs employing outreach to campus constituencies. These challenges include the following:

- Capturing the interest of various nonresponsive or minimally responsive departments to take advantage of our services.
- Convincing liaison librarians to leave the library as much as possible, to physically walk out the front doors in order to interact with academic faculty and students on their own turf
- Determining where the greatest need for new positions lies, creating these positions, and garnering funding for them.
- Supporting the increasing number of subject specializations and interdisciplinary programs
- Trying to make the academic program assignment load as equal and manageable as possible for each liaison librarian. Factors to consider when estimating load include student enrollment, graduate versus undergraduate program assignments, and numbers of faculty in each program.

Conclusion

The 2015-2016 partnership between UCF and LSU has led to a productive exchange of ideas for liaison program best practices with regard to outreach, instruction, research services, training, collection development, and assessment, and it has served to foster or reinforce successful liaison programs at both libraries. In the short term, each library also has identified additional tactical challenges (such as the need to complete curriculum mapping to further the development of curriculum-integrated instruction, create formal liaison relationships with additional key university units, and develop enhanced liaison training and assessment modules) that lay ahead in the immediate year(s), and each library is working on solutions to those challenges.
In the long term, both libraries understand that as broad changes occur throughout higher education (changes such as increasing subject specialization, new interdisciplinary academic programs, evolving online and mobile learning modalities, and changing user behaviors) their current liaison programs must also change and evolve to stay relevant to their constituencies.

In recent years, library liaison programs at institutions such as the University of Minnesota, the University of Iowa, Ohio State University, and Duke University, have embraced a new type of liaison model which they call the “engaged librarian” that encourages an even deeper involvement with the academic community and more stringent sets of competencies and best practices (Ohio State Universities, 2011) than currently are in place at UCF and LSU. As UCF and LSU libraries move forward with the evolution and enhancement of their own liaison programs, they may look to this engaged librarian model for inspiration and guidance. In addition, as UCF and LSU look ahead to devising new methods and models for assessing their evolving library liaison programs, they may consider new assessment ideas being discussed in publications such as ACRL’s “Assessing liaison librarians” (Mack, 2014).

References


The Nuts and Bolts of Supporting Change and Transformation for Research Librarians

Mira Waller, Associate Head, Collections & Research Strategy, North Carolina State University

Heidi J. Tebbe, Collections & Research Librarian for Engineering and Data Science, North Carolina State University

Abstract

Libraries have a rich tradition of providing services and support to researchers. In recent years, changing technology, evolving research methods and requirements, and the transforming landscape of scholarly communication have revealed a need for libraries to actively engage scholars and participate in the entire research lifecycle. As liaison and subject librarian roles shift to a more holistic and engagement-focused model, it is important that libraries provide them with the tools and resources to develop new skills.

This paper will focus on three ways in which the North Carolina State University Libraries created and supported relevant training and opportunities for research librarians to gain the expertise necessary to embrace new roles and deeper collaboration across the research enterprise. Examples include the Data and Visualization Institute for Librarians, the Visualization Discussion Series, and the Research Data Committee. Through these examples, we will share ideas for creating peer-to-peer learning opportunities, explore some of the skills necessary for increased engagement, and provide insights into the challenges and opportunities related to supporting and developing new skills for librarians.

Introduction

Subject liaisons have traditionally focused on providing services and collections. Recently, however, their roles have shifted from a support model to one that focuses more on engaging and collaborating with scholars throughout the research enterprise. In order to facilitate and ensure that such a shift is successful it is important that libraries provide the tools and the resources necessary to develop new skills. At North Carolina State University Libraries (NCSU Libraries), we are supporting the need for new skills by creating and providing training opportunities through a variety of methods including formal short courses, peer-to-peer training, committee work, and leveraging internal expertise.

This paper examines three ways in which the NCSU libraries designed, supported, and continue to provide relevant training and opportunities for research librarians: Data Visualization Institute for Librarians, the internal Visualization Discussion Series, and the Research Data Committee. All three of these examples were created in order to help librarians gain the expertise necessary to embrace new roles and deeper collaboration across the research enterprise. In some cases, we were focused on internal staff, and in others, we were interested in providing opportunities to the larger library community. With each example, we provide a brief history, describe its current status, explore some of the challenges and opportunities surrounding it, and take a look into the future.

Data and Visualization Institute for Librarians

Background

The Data Matters: Data Science Workshop Series (http://datamatters.org/) was started in the summer of 2014. This week-long series of classes is held every summer in Chapel Hill, NC, which is just a short drive up the road from NC State University. The series is sponsored by the National Consortium for Data Science, the Renaissance Computing Institute, and the Odum Institute for Research in Social Science. The series is for researchers, data analysts, and other individuals who wish to increase their skills in data studies and integrate data science methods into their research designs and skill sets. Classes generally run from 10 a.m. to 4:45 p.m. In 2016, an additional workshop series was held on the
NC State campus. Librarians from NCSU libraries, including both authors, have attended classes in the series every year since the Data Matters Series began.

Inspired by the Data Matters Series, the NCSU libraries, in collaboration with the Odum Institute, offered the week-long data science short course for NC State librarians in October 2015. It was hoped that this short course would allow participants to gain hands-on exposure to some broadly applicable tools and become familiar with important concepts and practices in the areas of data analysis, visualization, and content mining in order to enhance support for and collaboration with researchers and students in these emerging areas. Like the Data Matters Series, the short course lasted one week with classes meeting from 10 a.m. to 4 p.m. every day. Managers were supportive of participants clearing schedules to allow for participation.

The short course started with an overview for those with limited or no previous experience with data analysis and included sessions about project management, data visualization, text analysis, and working with messy data. After the short course, participants were encouraged to use their new skills on their own projects and present on those projects at group meetings. These projects involved studying reference transactions using text analysis and topic modeling, searching for NC State faculty conducting open science, studying relevant APIs, and showing the international reach of NC State’s College of Veterinary Medicine on a map.

This internal short course evolved into the Data and Visualization Institute for Librarians (DVIL). DVIL, a collaboration between the NCSU Libraries, the Odum Institute, and the Coalition for Networked Information, is a week-long course providing the opportunity for librarians to immerse themselves in learning about data science and visualization in collaboration with academic peers.

**Overview**

As with most initiatives and projects, getting DVIL off the ground and running smoothly took a dedicated group working together. In this case, that group consisted of the leadership of Honora Eskridge, Director of DVIL, and Hilary Davis, Head of Collections and Research Services; a curriculum team comprised of librarians from several different departments; and a logistics team that included a member from our two main libraries. The first DVIL took place from May 23, 2016, to May 27, 2016. Applications were taken from February 15, 2016, to mid-March 13, 2016. Applicants were asked to provide a letter of support from their library director and respond to the following questions:

- What is your experience and/or interest in data science and data visualization as a component of your work as a librarian?
- How will participation in this program benefit your work? Please describe one or more projects or initiatives you would like to explore during the program.
- In what ways do you expect your particular skills, experience, and perspective to contribute to the group learning experience?

The week-long Institute’s curriculum focused on the following topics: Data exploration and statistical analysis, data visualization, data description, sharing and reuse, data cleaning and preparation, and gathering and analyzing textual and multimedia data. Additional topics such as bibliometric analysis, version control with Git and GitHub, publisher and funder data use agreements, and open data and open science were discussed in short sessions, led by colleagues from the NCSU libraries. Participants were not required to have any computer programming or data analysis experience.

There were 85 applicants from diverse backgrounds. A common theme among applicants was the belief that they had a general sense of data science and visualization but lacked the deeper knowledge gained from more formal and hands-on training. Most applicants indicated they learned through massive open online courses, Lynda.com, webinars, and short courses. In some cases, applicants had intermediate knowledge in specific areas but needed advanced skills in order to best serve their researchers, faculty, and students. Additionally, librarians in tenure-track positions expressed a desire to apply data science and visualization techniques to their specific areas of research and scholarly output. Some institutions are creating data research or data management positions, while others are adding these responsibilities into existing positions such as subject...
liaison librarians. Upon reviewing the applicant pool and responses, it is clear that there is a need and a desire for data science and visualization training from librarians, on both a basic and an advanced level. The cohort of attendees was limited to 27, of which five were internal. Since the applicant pool was so diverse, it was no surprise that the attendees ended up being a diverse group from a variety of backgrounds within libraries (e.g., medical, information technology, science, humanities, cataloging, and assessment) and locations (Canada, California, Texas, and Australia).

Challenges and Opportunities

As an academic research library, our mission and goals tend to revolve around our institution, our patrons, and our community. We are not typically in the business of running week-long institutes, which pull resources from other areas and require support. As a result, one challenge we faced was sustainability. Another challenge we encountered related to sustainability is resource creep. Originally, we projected eight people would be needed to run DVIL. It actually took 23 people, in large part due to computing issues and needs. This leads to another challenge we faced: logistics. Even with a logistics team, it was difficult to manage all the different needs and requirements, including software, hardware, travel, and catering. The diverse needs and skills of the attendees also presented some issues. For example, some attendees had intermediate skills and wanted a deep dive into a few specific areas, while others needed more of an introduction and overview. A few attendees were in management and building teams with data science and visualization skills rather than directly responsible for using the skills themselves.

Although we faced some tough challenges, DVIL also offered us a number of opportunities. By building upon successive iterations of DVIL, we will be able to build a community of practice among the cohorts of the Institute. We would also build a network of experts at the NCSU libraries to serve as internal resources and future instructors. Furthermore, through DVIL we would be giving back to the library community by building up the role of librarians to include these other areas of expertise. Although the differing needs of the first institute’s attendees were a challenge, they could also be turned into separate tracks for future DVIL sessions. During this first iteration of DVIL, we learned through our applicants and attendees that despite their diversity, they had one thing in common: An increasing demand on their campuses for data support and growing expectations from their research and teaching communities for data services. With this increase in demand and expectations from academic and research communities comes an increased need for training options around data science for librarians, which is an opportunity for us to expand DVIL and create additional avenues for training.

Future

As we look to the future of DVIL, our first step is to incorporate the feedback we received from attendees of the first institute for more visualization, more hands-on training, and more networking opportunities. As part of this process, we also modified the name of the institute to better reflect its focus. DVIL is now the Data Science and Visualization Institute for Librarians or DSVIL (https://www.lib.ncsu.edu/datavizinstitute/about). We will also continue working on ways to improve logistics and to maximize the efforts of the DSVIL working group. Since providing different tracks was identified as a potential opportunity to expand DSVIL, we will explore ways to provide different flavors of the institute tailored to different groups. At the time of writing, planning for DSVIL 2017 is almost complete, and applications for the Spring 2017 Institute will be accepted from December 12, 2016, to January 27, 2017.

Visualization Discussion Series

Background

The NCSU Libraries has several ultra high-definition video walls and high-tech visualization spaces. The ad hoc Visualization Services team, created in October 2014, was tasked with shaping and articulating the libraries’ role in addressing campus-wide needs for visualization spaces, tools, and support. The original team was cross-departmental and included three members from the Digital Library Initiatives department (including one of the authors); one member each from the Research Engagement, Learning Spaces and Services, and Collections and Research Strategy departments; and one member from the Natural Resources Library.
The team is charged with supporting the Coffee and Viz seminar series (https://www.lib.ncsu.edu/events/series/coffee-and-viz). The Coffee and Viz series is a monthly event that takes place in one of the libraries’ high-tech spaces. NC State faculty come to present on how they use visualization in their research and teaching. Coffee and bagels are served beforehand, and it has become a popular venue for folks from across campus to come together to talk, learn, and connect. The idea of “Coffee & Viz for an internal audience” was first proposed in November 2014. This was the start of the internal Visualization Discussion Series.

Overview

The internal Visualization Discussion Series was an ongoing series of informal discussions led by library staff members on visualization topics and problems of interest. Initially, the discussions were held on Wednesdays from 11:00 a.m. to 12:00 p.m., roughly once per month with the location alternating between our two main libraries. Initial objectives for the series included sharing tools and techniques for visualization, giving examples of how visualization can be applied, getting feedback on visualization-related projects and initiatives, and fostering discussion of perceived campus visualization needs and how services could be improved.

Sessions were held that covered broad topics such as choosing the correct visualization and identifying misleading or inaccurate visualizations, a debriefing of a one-day course taught by Edward Tufte that was attended by several people from the libraries, and visualization-related conferences attended by people from the libraries. Several tools were discussed in their own sessions, including D3.js, GIS, GitHub, OpenRefine, Plotly, SAS, and Tableau Public. We also discussed trends such as generative art and virtual reality.

The discussion sessions were led by volunteers who came from departments across the libraries and from multiple levels, everyone from NCSU Libraries fellows to department heads. One speaker joined us from nearby Duke University.

Challenges and Opportunities

Logistics is always a problem, particularly with librarians with packed schedules who are physically spread across two main libraries and three branch libraries. Asking volunteers to lead sessions meant that a few people on the team ended up leading sessions more than once. Coming up with potential topics that someone in the library could speak about without undertaking a large amount of preparation became more difficult with time.

However, the series allowed for many opportunities. Attendees and leaders had the opportunity to learn new things. The discussion nature of the series allowed for idea generation and offered a place to share tools and techniques. It provided a forum for people to get public speaking experience in front of a friendly audience. It helped to foster discussion and encourage feedback. The series also contributed to collection development. As part of the The Good, the Bad, and the Tufte session, participants offered recommendations for visualization books; these recommendations were then used for an ongoing project to improve our data science collection.

Future

In the spring of 2016, the scope of the discussion series was expanded to include nonvisualization topics, such as digital media, making, and data science. The new series, Share with a Peer (SWAP), will maintain the emphasis on informal discussion and peer-to-peer staff development.

SWAP topics in 2016 included a staff hackathon, a discussion about the A/V Geeks at the Hunt Library series, orientations to the D. H. Hill Visualization Studio, the Teaching and Visualization Lab, and the Digital Media Lab, and a data repositories tour led by the research data committee.

Research Data Committee

Background

From July 2011 through January 2012, the NCSU Libraries took part in the ARL E-Science Institute (https://www.diglib.org/community/groups/arlidf-e-science-institute/) to help frame a strategic agenda for supporting research data management and its broader e-science needs at NC State. The group conducted an environmental scan, interviewed key researchers and administrators, and participated in a capstone meeting with peer institutions. During this process, we learned the following: Researchers
expect the libraries to be up to speed, provide
guidance, and advocate for their needs; researchers
primarily need to store data and make it accessible
to the public; and researchers are interested in
access to computational resources and voiced a
need for access to open data. The outcomes from
participation in the ARL E-Science Institute included:

- Building good momentum to move the
campus conversation forward about
supporting needs around data
management, discovery, sharing, and
access.

- Bringing the libraries more firmly in the
scope of being a part of the research
process.

- Identifying the libraries as key to helping
create a more cohesive approach at NC
State to bringing partners together and
reducing decentralized responses to data.

- Creation of the RDC.

Overview

The initial aims of the RDC were to build
organizational literacy and position the libraries to
be a partner as initiatives develop across campus.
The RDC is currently charged with developing and
promoting services to support research data
management at NC State. The committee’s current
membership includes librarians from many different
departments in the libraries such as branch libraries,
collections and research strategy, research
engagement, special collections, administration,
acquisitions and discovery, and the copyright and
digital scholarship center. Eventually, we hope to
cycle as many librarians as possible through this
committee so that we can build up internal expertise
for research data support throughout the libraries.
Having a diverse and rotating membership also gives
us the ability to pull in expertise from the various
departments across the libraries. To date the
committee’s efforts have been focused on providing
introductory data management planning (DMP)
training to both internal and external audiences,
delivering customized guidance on individual
researcher’s DMPs through our DMP review services,
connecting researchers with data repositories, and
helping researchers understand the complex rules
and expectations around making grant-funded research publicly available.

Challenges and Opportunities

Staff time is finite, and it is often a challenge to carve
out more time from someone’s already full schedule
to serve on an active committee. Furthermore, there
is a high demand for “just-in-time” support for some
of the services provided by the RDC. This kind of
quick and last minute support requires a highly
responsive and available team. Although we were
pulling in expertise from different departments, it
was unlikely that anyone on the committee would
be an expert in all the areas related to research data
support. Cross training would be necessary, and as
new members rotate on to the committee, they
would also have to be trained.

Fortunately, there are a number of opportunities
and rewards that come from providing services
through the RDC. By providing research data support
in a highly responsive manner, we have been able to
create more connections with the campus community and have more interactions with faculty,
postdocs, and graduate students. Along with the
internal network of experts we are building, this
helps us to position the libraries to be a partner as
initiatives around research data develop across
campus.

Future

As the RDC continues to evolve, we anticipate
providing enhanced training that includes more
active, hands-on workshop components. We also
believe that there will be a need to scale up on
supporting public access compliance. We plan to
follow up with principal investigators on DMPs that
we have provided assistance on. We also would like
to be included in research grants either as
consultants or as actual personnel on the grant to
support data management process. We are
interested in providing more guidance on data
publications—what they are and why they are useful
to you, as well as providing assistance with tools or
platforms that would support data publication.
Finally, we will continue to use the RDC as a hub to
train and build expertise and capacity internally.
What Are Subject Liaisons When “Collections” and “Subjects” Don’t Matter?

Darby Orcutt, Assistant Head, Collections & Research Strategy, North Carolina State University at Raleigh

Mira Waller, Associate Head, Collections & Research Strategy, North Carolina State University at Raleigh

Scott A. Warren, Associate Dean for Research and Scholarship, Syracuse University

Abstract

In this interactive lively lunch discussion, participants explored issues around how the traditional subject liaison role is evolving. Users increasingly require functional information support (e.g., for geographic information system (GIS) or data mining) rather than simply domain-specific. At the same time, reports from the Association of Research Libraries (ARL) Pilot Library Liaison Institute and others have noted self-conscious trends toward developing liaison roles that engage and support the full research life cycle, as opposed to traditional service models focused on building and promoting library collections as more or less fixed products. Hosts Darby Orcutt, Mira Waller, and Scott Warren outlined some of the major themes surrounding the future of these new roles and with participants explored questions that include: What does it mean to be a collections librarian in this new world? What new skills do we need to develop? What old skills should we not lose? How do we adapt both our institutions and our individual staff without sacrificing our (or their) very identities?

Lively Lunch Discussion

The lively lunch began with Waller providing a brief introduction and a call for attendees to actively engage in the discussion around how the traditional subject liaison role is currently evolving and what the future holds post-transformation. The following questions were provided to participants at the start of the discussion to provide food for thought throughout the session:

- What are the sacred cows around liaisons?
- Do you expect your current role to continue as is? Is it already changing?
- Do you see yourself as a deep expert, generalist, or functional specialist?
- How important are spaces to your current role? To your library as a whole?
- When are too many disparate skill sets too many? Too many subjects?
- What are the trade-offs when we chase the latest trends?
- Where do liaisons sit in your organizational structure? Where should they?

Waller ended the introduction by taking a straw poll of the room to get a sense of how many attendees were at institutions that had already begun changing or modifying the responsibilities of these roles. Many of the attendees raised their hands. Waller then turned over facilitation to Warren, who took participants on a deeper dive into the concept of the subject liaison librarian identity.

Warren began by noting how that the central identity of subject librarians has become more fluid and perhaps even transitional in recent years. A once stable and common understanding that the role encompassed working with a small number of disciplines, building collections, teaching information literacy sessions, and staffing a reference desk can no longer be assumed. In part this is the because the former common identity originated in a print-based world predicated upon the need to provide faculty with easy access to print journals and books. However, online journals have overwhelmingly replaced print, many branch libraries oriented around departments have been consolidated within larger interdisciplinary libraries, and far fewer subject librarians staff reference desks as service models have shifted. Perhaps most importantly, there has been a steady amalgamation of areas to which subject librarians liaise. Taken collectively, these changes raise many challenging questions that touch on aspects of professional identity.

Services

- What functions of a subject librarian are central to identity? What are peripheral?
• What is it that only subject librarians can do?
• What does it mean to identity to no longer be a one-stop shop? To promote library services plus their own services.
• Service provision versus project management—can subject liaison identity incorporate the latter or is predicated upon the former?

**Expertise**

• What happens if subject librarians are no longer be perceived as having disciplinary expertise?
• When are disparate skill sets overwhelming?
• When do many subjects become too many subjects?
• How do subject librarians and a growing cadre of functional specialists whose expertise spans disciplines relate?

**Organizational Culture**

• What does organizational structure mean for identity as a subject librarian?
• Is identity tied to a physical location? A branch library or being embedded within an academic department?
• Is it tied to faculty relationships? What happens when faculty rarely visit a library?
• Where should liaisons sit in an organizational structure? Collections? Teaching? Some type of Reference? A mix of all three? Or something new?
• What about the challenge of professional affiliation as liaisons become responsible for more disciplines? What if they also wish to develop deeper expertise in a functional area? For instance, can we really expect liaisons to attend Association of College and Research Libraries (ACRL), Charleston, and Library Orientation Exchange (LOEX) even though their jobs may touch on all three? Finding a professional home matters to identity.

Orcutt outlined some possible alternatives to the traditional subject specialist identity, beginning with a now common approach that many institutions are taking: The functional specialist. With liaisons increasingly covering many more disciplines, true disciplinary expertise seems to be less valued by institutions. Many institutions are abandoning true subject specialization, and others are paring it back considerably to align with institutional strengths or priorities. Functional specialty emphasizes nonspecialty specific skill sets. In pursuing this type of approach, libraries must ask:

• What sort of functional experts do we need?
  o Digital humanities?
  o Data science?
  o Visualization?
  o Open science?
  o Scholarly communications?
• Do functional needs outweigh disciplinary?
• Which skill sets are easier to train versus recruit?
• What if more institutions move in the direction of functional specialty? What might be lost collectively?

Orcutt then introduced for discussion a new possible way of conceiving of librarian identity: The concept of librarians as interdisciplinary specialists. Rather than focusing on traditional disciplinary expertise, the interdisciplinary specialist would be seen as bringing expertise on the “edges” of fields, including both facilitating the intersections of various disciplines as well as where these disciplines intersect with the functions of librarianship.

• Just as the “edges” define great collections, can they define great liaisons?
• Do researchers need more help at the boundaries of their fields?
• How could liaison roles address the increasing interdisciplinarity of research?

Orcutt, Warren, and Waller then took participants through discussion around the following themes: Collection, research cycle, new spaces, and new
technologies. Regarding collection, attendees explored the following questions:

- Can we trust vendors/demand-driven acquisition (DDA)/patron-driven acquisition (PDA)/document delivery and automate most collecting?
- Should collection management be a functional specialty?
- Is automation outsourcing? Does it undermine trust in our ‘brand’?
- What role do liaisons play in creating content?
- Collecting beyond books, journals, databases—how does it impact your work?
  - Faculty brands
  - Research data
  - Evolving scholarly record

Regarding the research cycle, participants explored the following questions:

- Should we be inserting ourselves more upstream or downstream?
- Identify/research reputation management
- Funder mandates
- Grant support
- How far can we rely on third-party solutions?
- Is this type of work a subject specialist role or a functional specialty?

Participants explored the following questions around the theme of new spaces and new technologies:

- Are these driving organizational structures or vice versa?
- What positions are needed to maintain them?
- How do these two factors impact more classical services and roles?
- How is space accorded? What services are moved to the forefront?

References


