THE EXPERT LIBRARY

STAFFING, SUSTAINING, AND ADVANCING THE ACADEMIC LIBRARY IN THE 21ST CENTURY

edited by

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Preparing Our Librarians for the Future: Identifying and Assessing Core Competencies at the University of Minnesota Libraries
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Academic libraries have entered a period of gross mutability, a state of constant change, productive and powerful chaos, hybrid strategies, and essential creativity in advancing their individual and collective visions.

Academic libraries are about users: faculty and students who demand an expanding array of dynamic and responsive services, and learners and researchers across the network who routinely reach beyond their institutional boundaries. Academic libraries are about a shifting array of professional, technical and support personnel who bring critical expertise and experience to both the sustained responsibilities and the new roles that higher education libraries are advancing. This volume, for the first time, brings together fresh thinking and insights about what will be required to advance library relevance and success through people.

Each chapter teases out a new perspective on the changes which are redefining the library in the academy. Academic libraries will remain focused on the core functions of: identifying (selection), getting (acquisition), organizing (synthesis), finding (navigation), distributing (dissemination), serving (interpretation), teaching (understanding), using (application), and archiving (preservation) information in support of teaching and learning, and in support of research and scholarship.

The boundaries of the library are expanding in areas such as publishing, teaching and learning, research and development, entrepreneurial initiatives and new business development, and information policy advocacy. And the extension and professionalization of the administrative functions in the academic library are demanding backgrounds and capabilities that respond to the complexities of space
Library leaders have been discussing the changing nature of our profession for some time now, but it is only recently that the widespread adoption of numerous technological advances and the "emergence of open/collaborative models" have presented academic librarians with a wide range of new opportunities. With fewer in-person reference transactions and more automated approval plans for collection development, less emphasis is now placed on traditional librarian roles. Instead, there is an increasing need for "blended" or versatile librarians who collaborate with faculty to actively contribute to an institution's research and instructional mission. For example, new models of scientific research, often referred to as "e-science," offer opportunities for creating virtual communities by discipline, shaping new modes of scientific communication, and preserving and serving up large data sets. In addition, the movement away from "one-shot" instructional sessions and toward a more holistic approach of integrating information literacy into the curriculum requires increased collaboration with faculty in developing assignments and creating online tutorials and digital learning objects. In general, academic librarians now need to possess a higher level of technical expertise as well as an understanding of a whole host of emerging issues, from new models of scholarly publication, to data curation, to learning theory and instructional design. It has become
clear that what librarians do and the skills they possess must change in order for us to remain relevant to our faculty and students. We must align our roles and responsibilities with the goals and mission of our institutions. As Andrew Dillon notes, "The future of academic libraries will be determined by the extent to which they amplify the mission of their host institutions... Libraries must enable and accelerate learning and discovery."

In 2004, the University of Minnesota began a strategic positioning process that culminated in a final report in 2007. This three-year planning process resulted in the university's goal to become one of the top three public research universities in the world, emphasizing collaborative, interdisciplinary research; new modes of scholarship; student learning communities; a new undergraduate writing curriculum; and a greater role in civic engagement. The libraries participated in several aspects of this planning process and read and evaluated task force reports as they were written to consider how we could support the university's new mission and vision.

At the same time, the University of Minnesota Libraries began the process of transforming the role of our subject and reference librarians to reflect this changing environment. We conducted a number of focus groups, interviews, and surveys to better understand the needs of our undergraduate and graduate students and to further define ways in which the libraries could support research in the humanities and social sciences and the sciences. These assessments were useful in two ways: we learned a great deal about user needs and were able to identify new ways to meet these needs, and the assessments themselves served to model new roles for our librarians. The assessment process emphasized the need for us to move from a traditionally passive role in which the user typically initiates contact through reference questions and collection requests, to an increasingly active role in which we continuously seek to identify new needs and then collaborate to develop customized solutions. The process helped us not only to learn that researchers needed help in areas such as keeping current in their fields and managing the primary research materials that they collect, but also that the libraries had a responsibility to assist the liaison librarians and the entire library staff through a period of considerable change. To do this, the libraries focused on defining responsibilities, clarifying expectations, and supporting liaison librarians throughout this transition from a more passive supportive role to an active partnering role.

In this chapter, we share the libraries' process, the documents that were developed, and the results of a staff assessment that we conducted to identify any gaps between the skills that librarians need in the near future and the skills that they currently possess. The libraries' goals were to develop a framework for liaison positions that aligns with the mission and vision of our university and with trends in higher education overall, and to assist our librarians through a period of tremendous change in the profession.

Restructuring

Prior to 2003, the University of Minnesota Libraries was a team-based organization in which collection development and management (CDM) and reference and consultative services (RCS) were separate teams. Some librarians were strictly "bibliographers" who reported through CDM, some were strictly "reference librarians" who reported through RCS, and some had blended roles and were arbitrarily assigned to one team or the other. In addition, we had a user education coordinator, but librarians who offered instruction did not report to this coordinator and instead reported through either CDM or RCS, a reporting structure that diluted her authority and effectiveness.

In 2003, the University of Minnesota Libraries formed a new division entitled Academic Programs (AP), which was an explicit merger of collections, reference, and instructional responsibilities. The name "Academic Programs" was chosen to emphasize the libraries' role in developing partnerships with academic departments on campus and stressed the importance of working with students and faculty to develop new tools and services. For some staff in broad subject areas in which reference librarians and bibliographers had traditionally been separate positions, the merger took time and required a clearer articulation of the new, blended roles. For all staff, the idea that librarians not only supported departments but also developed partnerships with them was a new and not necessarily comfortable concept. Many librarians were not certain about what it meant to be a partner. They were hesitant to initiate conversations that did not revolve around collection needs or reference questions and unsure of methods to identify new
needs in their user communities and ways to address them. Ultimately, the libraries wanted to help the liaison librarians thrive in an environment of ambiguity, of constantly changing user needs.

An Associate University Librarian (AUL) for Academic Programs was hired in fall 2004, and in the fall of 2005, the AP division began a planning process to clarify these roles and better define the expectations of liaison librarians in the division, moving the emphasis away from reference desks and collection activities toward an active liaison model that required initiative, comfort with ambiguity, and an ability to form collaborative relationships with our user communities. In addition, the process sought to restructure the division to address an imbalance in the size of departments within the division and to regulate system-wide activities such as e-mail and chat reference services, information literacy, learning spaces, and the development of online tools.

As a result, one new department was formed, and the humanities and social sciences were divided, resulting in six departments: Coordinated Educational Services, Arts and Humanities, Social Sciences and Professional Programs, Archives and Special Collections, Physical Sciences and Engineering, and Agricultural, Biological and Environmental Sciences. Directors were appointed to lead each department.

Redefining Professional Expectations and Position Descriptions

A set of general professional expectations that are considered essential for successful job performance was developed. These expectations included anticipating and responding to the changing needs of users, leading from within, being flexible and adaptable, and thriving in a collaborative environment. A complete list of these professional expectations is provided in Appendix A.

In addition, a new framework for librarians' position descriptions was drafted. The overarching role for almost all AP librarians was defined as liaison to academic departments. The framework includes examples of what constitutes good interaction with faculty and students and goes on to address traditional roles, such as collections and reference work, as well as newer roles such as participation in issues of scholarly communication and the development of new online learning and digital tools. The emphasis for liaisons is currently on assigned departments, but the libraries are now considering explicitly including research centers and institutes and addressing the need for liaisons to work across disciplines to better support interdisciplinary research. The entire position description framework, as well as an introduction for staff about how it is a living document that will change over time, is included in Appendix B.

Both the professional expectations and the position description framework served to facilitate a better understanding of responsibilities and to ensure more consistency across the division. However, it should be noted that while both documents focused on what the libraries needed and expected of our librarians, the AP directors acknowledged that not everyone yet had the knowledge, skills, and abilities (KSAs) to carry out their new responsibilities. These KSAs, or job competencies, included both task-based requirements for carrying out individual responsibilities, such as the ability to conduct a needs assessment, and softer skills, such as responding to changing needs and aligning individual goals with larger institutional goals.

Developing a KSA Assessment

It therefore became important for the AP division directors to accomplish two goals: to create an atmosphere in which librarians were fully informed of the responsibilities of their newly structured positions, and to support librarians' professional development in areas in which they were less skilled or comfortable. To meet these goals, the AUL for the AP division brought in an ARL Academy Fellow, who worked with an AP department director, to spearhead the creation and administration of a self-assessment of the current knowledge, skills, and abilities of all AP librarians.8

It was our intention to use this assessment to analyze the gaps in desired competencies among AP division librarians and provide a focus for a professional development program and future hiring goals. Just as useful, we hoped that current AP librarians, simply by taking the assessment, would become more fully aware of the KSAs that the administration believed to be vital for the future success of the division.

We began this project by using the libraries' newly created position description framework to delineate the desired categories for the
KSAs. We added several additional broader areas of importance, and then used a detailed, multistep process—scans of the existing literature, discussions with staff who possess expertise in each category, interviews with current practitioners, and suggestions from a group of AP directors—to create a draft list of KSAs for the assessment.

KSA categories and sample statements follow. For the entire assessment, please see Appendix C.

- **Teaching and Learning**
  - Understand and apply principles of learning theory.

- **Reference and Research Services**
  - Collaborate/partner with the user in the information-seeking process.

- **Collections Management**
  - Look for collaborative ways to accomplish collections goals.

- **Liaison/Relationship Building/Communications**
  - Participate in the development of new tools and services in response to user needs.

- **Archives and Special Collections**
  - Understand the nature and purpose of primary research and the significance of original artifacts.

- **Technology**
  - Demonstrate the value of technological tools to users and colleagues.

- **Scholarly Communication**
  - Advocate for sustainable models of scholarly communication.

- **Leadership**
  - Understand and apply program management skills.

- **Professional**
  - Know the basics of using statistics and understand their misuse.

We decided to structure the assessment using a method that we felt would best analyze gaps in competencies: for each section of KSAs, we created a matrix of multiple-choice statements, each of which required the respondents to rate their perceived current level of competency. The options were as follows:

- Basic or less
- Basic or less, but need to know more
- Intermediate
- Intermediate, but need to know more
- Advanced
- N/A

Respondents were also given the opportunity, at the end of each category, to add in a comment field any KSAs that they felt had not been covered or emphasized sufficiently.

In creating this assessment, we did not intend to produce a statistically valid tool. Rather, we believed that the best method would be to create the means for addressing both where librarians believed their current skill levels to be and where they felt they did or did not need to know more. This method allowed us to identify the division’s actual gaps, and it helped us to identify the KSAs that respondents believed were important (or unimportant) to their positions and to the division.

The assessment, which we created and administered online using a service called SurveyMonkey (www.surveymonkey.com), was piloted with a group of five volunteer pretesters (all AP division librarians from various departments). The pretesters’ critiques and suggestions were considered in the final version of the assessment.

The final assessment was administered to all AP librarians and archivists, a group of 53 individuals. We received a response rate of 65%. At the beginning of the assessment, respondents were asked to identify their department, and department directors received the results for their department as well as for the AP division as a whole. However, aside from department identification, the assessment results were anonymous.

Each department director discussed the results with the librarians in his or her department, providing insight, responding to concerns, and seeking feedback on the results. The feedback received from each department was brought back to a meeting of all AP directors. The data that we received from the assessment responses, along with the verbal feedback that we received from division librarians, proved to be quite useful. First, AP directors were able to work with individual librarians to set professional development goals for the coming year. Second, the directors worked with the AUL to build a staff development program.
that focused on specific identified needs. And third, the program directors and AUL considered which skills could not easily be developed within and across staff (for example, instructional design and computer programming) and should be built into new positions as they became available.

In general, respondents appeared to be honest in their self-assessments. If anything, respondents tended to be overly self-critical when evaluating their knowledge, skills, and abilities. In at least one department's follow-up discussion, several librarians indicated that they checked “advanced” very rarely because they believed that they always had more to learn in almost every area.

From the aggregate data that we received in the results, we were able to identify some overarching needs. Throughout the assessment, it was clear that many librarians felt they needed to improve their knowledge of and skill in various technologies, or at least to improve their ability to maintain an awareness of new technologies in all aspects of their jobs. For instance, many librarians responded “Basic or less, but need to know more” for “Understand and effectively incorporate instructional technologies (e.g., online tutorials) into instruction.”

Assessment was another broad topic in which respondents repeatedly indicated a need for further education, with, for example, many responding “Basic or less, but need to know more” for “Understand and effectively incorporate instructional technologies (e.g., online tutorials) into instruction.”

Results also indicated some other specific educational needs. In the area of leadership, respondents felt that they needed improvement in both project and program management and, more generally, in leading from within (rather than simply leading when assigned a traditional leadership role). The data also identified a gap in the understanding of the relevance of archives and special collections to other areas of librarianship. Finally, librarians responded that they needed to know more about identifying grant opportunities, grant writing, using statistics and understanding their misuse, creating effective professional presentations, writing for publication, and presenting information or data in an understandable format.

The assessment also allowed us to identify areas in which our librarians already viewed themselves as competent. One of these areas was collections management, although many librarians indicated that they needed training in understanding and evaluating license agreements and in generating collections reports to guide selection. In addition, AP librarians were fairly confident in the reference and research category, particularly when responding to questions about specific knowledge and skills. Many felt less confident in broader or less traditional areas, such as “understanding the broad universe of information in order to create content and tools that anticipate and respond to questions without mediation” and “contributing to the development and refinement of existing tools.” Likewise, many felt that they needed some training in keeping current with new information resources, a result that may point to the rapidly increasing numbers of available resources and formats.

Other KSAs for which a significant portion of respondents rated themselves as advanced included the following:

- “Respond to changing needs by taking on short-term responsibilities that move the Libraries forward”
- “As a group member, contribute actively and constructively to help the group achieve its goals”
- “Identify and take advantage of opportunities for professional growth and development”
- “Develop collaborative relationships within the library profession”
- “Work comfortably in a multicultural environment”
- “Communicate effectively with diverse groups, including those whose first language is not English”

As the first step in addressing the division’s apparent gaps in knowledge, skills, and abilities, a list of professional education goals was added to the AP division’s overall goals for the 2008–2009 fiscal year. These goals were explicitly based on the perceived gaps from the KSA assessment results and included development of the following offerings:
leadership and leading from within; development, donor relationships, and grant-seeking; integration of archives and special collections into research, teaching, and learning; and training in collections management selection tools. It also included the goals of continuing professional education offerings for staff in information literacy and scholarly communication. AP directors then worked with individuals to incorporate these professional development opportunities into their personal goals.

In summary, our process may be reflected as shown in figure 6.1.

**FIGURE 6.1**
Summary of KSA Process

<table>
<thead>
<tr>
<th>Restructured Division</th>
<th>Developed Professional Expectations →</th>
</tr>
</thead>
<tbody>
<tr>
<td>Redefined Position Descriptions</td>
<td>Conducted KSA Assessment →</td>
</tr>
<tr>
<td>Included Training Needs in Division Goals</td>
<td>Considered Skills Needed for Future Hires</td>
</tr>
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</table>

**Summary**

Ultimately, this KSA project will be part of a continuum of efforts to position University of Minnesota Libraries' staff for the future of academic librarianship, as it supports and aligns with the mission and vision of the university overall. The libraries will keep these needs in mind as we hire new liaisons and rethink open positions, particularly relevant since a retirement incentive will result in a large number of new openings in the coming year. Positions will be reconsidered in light of new emphases at the university, including new directions in e-science, scholarly communication, and information literacy. The required qualifications for these positions will reflect the new knowledge, skills, and abilities needed to support these responsibilities, and we will continue to address the needs of current staff as we develop our professional education offerings.

 conducting a division-wide self-assessment at this time in our profession has presented us with both challenges and opportunities. We believe that we captured a snapshot of the current needs of the AP division, and we further think that the KSAs we listed identify many of the current and developing areas of importance within academic librarianship. However, the changing nature of librarianship and higher education today means that some of our identified KSAs could become much less significant in the near future, while at the same time new competencies will become important. For instance, as we began administering the assessment, an ARL task force published a report on e-science, detailing the ways in which research libraries should become important players in the increasing role of e-science in the scholarly community. Although we referenced topics related to this field in the assessment (data curation, for instance, as it relates to our University Digital Conservancy), we did not mention e-science by name or refer to other aspects of this developing field. This experience supports an assumption about our future that was discussed recently in the ACRL Environmental Scan 2007: “the skill set for librarians will continue to evolve in response to the needs and expectations of the changing populations (students and faculty) that they serve.”

The administration of this KSA assessment was a positive experience that has enabled us to be more proactive and strategic in shaping the future of our profession. It initiated a conversation among staff about the changes taking place within academic librarianship, and it has helped position the libraries for the future. It was one tool in a continuum that the University of Minnesota Libraries have used to assist our staff through a challenging period of transition, and we believe other libraries could apply this process as well: define expectations, align liaison positions with the goals and needs of the larger institution, discuss strategies for working in an environment of ambiguity, clarify what work should be given up in order to assume new roles, acknowledge the sense of loss that many staff will experience as they shift away from areas in which they were expert (e.g., reference work), and provide a strong professional development program based on identified needs to support and empower liaisons as their roles continue to evolve. Constant communication is critical, and an assessment can be one effective way to position your library to thrive in an ever-changing and exciting environment.

**Notes**

APPENDIX A

UNIVERSITY OF MINNESOTA LIBRARIES
ACADEMIC PROGRAMS DIVISION PROFESSIONAL EXPECTATIONS

General Professional Expectations
The performance expectations listed below are considered essential for successful job performance. They will be considered in setting an individual's goals and in reviewing the quality of the staff member's performance.

Knowledge of Role / Expertise
- Demonstrates a clear understanding of one's role and responsibilities as a member of the University of Minnesota and the University Libraries.
- Keeps current with the literature, issues and trends pertinent to the position, including the University's curriculum and research foci and trends.
- Cultivates a thorough understanding of the University Libraries' system and approaches all work with a philosophy of serving and educating users of the system.
- Strives to provide outstanding customer service, meeting and exceeding customer wants and needs.
- Fulfills responsibilities in a professional manner.
- Anticipates and responds to changing needs of users.
- Knows and follows ethical standards of the profession.
- Develops a breadth of knowledge of technological possibilities and applications.
- Applies good judgment, analytical skills and subject knowledge to job performance.

Leadership / Initiative
- Contributes to setting directions and developing and carrying out goals for the department, division, and the Libraries, displaying leadership and vision.

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- Knows and follows ethical standards of the profession.
- Develops a breadth of knowledge of technological possibilities and applications.
- Applies good judgment, analytical skills and subject knowledge to job performance.

Leadership / Initiative
- Contributes to setting directions and developing and carrying out goals for the department, division, and the Libraries, displaying leadership and vision.
• Provides leadership (supervisory and other) that guides individual and unit/departmental performance, inspires a shared purpose, and contributes to the forward movement of the organization.
• Leads by example, conveying to the external world positive support for University Libraries, division, departmental and unit goals and priorities.
• Takes the initiative in recognizing, analyzing and constructively solving problems and overcoming barriers.
• Makes recommendations for program and service improvement.
• Develops leadership skills and innovative ideas to contribute to the advancement of the profession by participation in professional organizations, initiatives, and scholarship.
• Seeks to be a full partner in the educational and research process, anticipating and adopting technology advances and changing behaviors in research, teaching, learning and information seeking.
• Involves staff and others, as appropriate, in analyzing tasks and investigating alternative ways of doing things.
• Demonstrates innovation, creativity, and informed risk-taking.

Flexibility / Adaptability
• Demonstrates flexibility, openness, and receptivity to new ideas and approaches and encourages others to embrace this attitude.
• Anticipates and adapts to new challenges, changing priorities, situations, and demands.
• Handles multiple tasks and priorities well.
• Recognizes and embraces ambiguity in our environment.
• Anticipates how to be a vital partner in the changing research and learning enterprise.

Collaboration
• Demonstrates ability to work well in groups within individual units and beyond.
• Seeks ways to build team efforts to solve problems and achieve common goals.

Interpersonal Relations
• Exhibits a positive attitude.
• Is approachable/accessible to others and responds in a cooperative, diplomatic, and courteous manner.
• Treats differences of opinion in a serious, non-judgmental fashion.
• Demonstrates fair and equal treatment towards everyone.
• Exercises sound, ethical, and accountable judgment.
• Respects the demands made on colleagues and those in formal leadership positions.
• Maintains appropriate confidentiality and respect for individual privacy.
• Guides and influences the future of libraries and librarians by developing mentoring relationships with colleagues, especially new staff, and by imparting a firm foundation in the values and ethical standards of the profession.
• Strives to help people be successful.

Communication
• Identifies internal and external users and stakeholders and communicates with them effectively and in a timely manner.
• Effectively promotes our services and resources to users.
• Is mindful that messages are sent and received both verbally and non-verbally, whether intentional or not.
• Demonstrates effective "listening" skills (regardless of medium) and provides opportunities for input.
• Promotes an environment where communication is encour-
aged, open, and flows in all directions in the organization.

- Evaluates communication effectiveness, checking for and removing barriers, both personally and within the unit/department.
- Provides timely feedback to individuals and their supervisors on substantial contributions or significant negative impacts to a project, committee, or unit for which one is responsible.

**Resource Management**

- Demonstrates a broad knowledge of our organization and recognizes the responsibility to be informed.
- Demonstrates effective, efficient, and responsible use of resources to best support goals and objectives.
- Practices good time management and respects others' time.
- Prioritizes work appropriately.
- Demonstrates a strong commitment to improvement of operations and services (for example, by improving performance and productivity, reducing redundancy and bottlenecks, automating labor intensive efforts and instituting collaborative arrangements where appropriate).
- Looks beyond the daily work of the library to the larger picture, forming a vision and appropriate work plan for the future.

**Integrity**

- Honors commitments.
- Holds self accountable and behaves in a consistently ethical and responsible manner.
- Acts with consistency, honesty, fairness and professionalism.

**Campus Engagement**

- Actively engage with faculty, students, and staff in assigned areas, developing strong working relationships.
- Promote current services and collections.
- Be knowledgeable about and be able speak to a range of library issues, including scholarly communication, the emerging digital conservancy, the development of new online tools, and the integration of information literacy skills into the curriculum.
- Assess user needs to develop and maintain relevant, high-quality services and collections.
- Analyze trends in departmental teaching and research pro-
grams, stay abreast of scholarship in the disciplines themselves, and use this knowledge to respond to departmental needs.

- Seek opportunities to collaborate and establish partnerships with departments, including the creation of digital content and services. Examples include:
  - Collaborating with data producers and repository contributors to develop cost-effective and efficient strategies for managing data and information.
  - Seeking opportunities to partner with researchers in projects or grants that require intense information and data management.

- Examples of good interaction include:
  - Engaging in individual conversations, especially as we increase the amount of time we spend outside the Libraries, in departments, research centers, and areas in which students gather
  - Seeking participation in departmental, college and campus committees
  - Attending and presenting at departmental meetings, seminars, and colloquia
  - Forming and working with library advisory committees.
  - Content / Collections (Acquisition, Stewardship, Promotion)

- Build and manage library collections in the subject areas of XXX by:
  - Systematically selecting material in all formats (print, manuscripts, digital, data sets, fixed and streaming multimedia), to serve the current and future research, teaching, and learning needs of University of Minnesota clientele.
  - Building on collections of distinction that may also serve regional, national and international users.
  - Managing collection funds efficiently, effectively and in a timely manner.
  - Strategically assessing and making decisions regarding the acquisition, retention and preservation of collections.
  - Working proactively with technical and access services staff on appropriate arrangement, description, cataloging and provision of access to traditional collections and electronic resources.
  - Discovering and recruiting institutional scholarly output, research data and other content for inclusion in the University Libraries’ digital initiatives.
  - Developing and maintaining relationships with dealers and donors (of both in-kind and monetary gifts).

Teaching and Learning

- Actively engage with faculty and graduate teaching assistants as partners in programmatically integrating information literacy concepts and skills into the curriculum

- Using sound instructional design practice, develop learning materials and instructional sessions in a variety of formats that teach students to:
  - Recognize information needs, create successful search strategies, and evaluate and effectively use information resources in all formats, including archival and other primary materials as well as secondary sources.
  - Understand the research and scholarly communication patterns of their chosen disciplines.
  - Understand the economic, social, and legal issues around the use of and access to information.

- Deliver effective instructional sessions as appropriate. Determine when it is more appropriate to have students use online tools; or to give learning materials to faculty and teaching assistants for their incorporation into class sessions.

- Conduct needs assessment as appropriate and selectively measure instructional outcomes in order to ensure effectiveness of instructional initiatives.

- Maintain an up-to-date knowledge of relevant University and department curriculum initiatives, in order to keep information literacy program consistent with University curriculum.

- Develop and manage physical and/or online learning spaces.

Scholarly Communication

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

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

**“Ask Us” Services**
- Actively seek opportunities to provide customized reference and research services, which include:
  - Providing consultations that involve subject or other specialized areas of expertise (e.g., in-depth knowledge of copyright or scholarly communication issues or specific collections).
  - Answering referred questions in all formats (chat, e-mail, phone, desk/in-person) and individual / group consultations.
  - Applying knowledge of how research is conducted in certain disciplines.
  - Extending services such as mobile librarian activities, administrative research service, blog creation in partnership with departments, partnerships with the Office of Business Development, morning report type activities, etc.
- Provide high quality reference and research support on demand by:
  - Providing assistance and one-to-one instruction in finding and evaluating information.
  - Providing assistance in accessing library resources and services.
  - Providing feedback about user success with resources and services.
  - Providing support in using information effectively in all formats.
  - Documenting and analyzing data on reference transactions, both at service points and for customized reference transactions.

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

Fundraising
- Identify and monitor relevant government agencies and private foundations for funding opportunities.
- Identify potential projects/activities for grant funds; prepare and submit grant proposals.
- Identify potential donors and work with the Libraries Development Office to cultivate donors as appropriate.
- Seek input from academic department heads and faculty about needs that might be met with external funding.

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

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

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

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

UNIVERSITY OF MINNESOTA LIBRARIES ACADEMIC PROGRAMS DIVISION KNOWLEDGE, SKILLS AND ABILITIES SELF-ASSESSMENT

Ratings:
- Basic or less
- Basic or less, but need to know more
- Intermediate
- Intermediate, but need to know more
- Advanced
- N/A

1. I am a member of:
- Archives and Special Collections
- Arts and Humanities
- Coordinated Educational Services
- Physical Sciences and Engineering
- Social Sciences and Professional Programs
- Agricultural, Biological, and Environmental Sciences

2. Teaching and Learning
Please rate your current knowledge, skills, and abilities in the following areas:
- Understand and apply principles of learning theory
- Understand and accommodate different learning styles
- Understand and incorporate the principles of instructional design into information literacy activities
- Be familiar with the *Information Literacy Standards for Higher Education*
- Understand information literacy needs for assigned or relevant disciplines
- Understand the methods of disciplinary instruction in assigned or relevant areas
- Proactively partner with faculty, curriculum committees, and/or departments to integrate information literacy into their curricula
- Develop and manage physical learning spaces
- Develop and manage online learning spaces
- Work with faculty to design effective assignments
- Find and incorporate previously created instructional resources
- Create engaging and effective instructional materials
- Incorporate active learning techniques into instruction as appropriate
- Deliver dynamic presentations to large groups
- Understand and effectively incorporate educational technologies (e.g., online tutorials) into instruction

3. Reference and Research Services
Please rate your current knowledge, skills, and abilities in the following areas:
- Understand the broad universe of information in order to create content and tools that anticipate and respond to questions without mediation
- Contribute to the development and refinement of existing tools
- Understand and apply knowledge about the process of information seeking to structure information services for users
- Have an understanding of assigned or relevant disciplines and reference tools that support advanced help in these areas
- Understand the flow of information and how that flow may differ by subject
- Keep current with new information resources
- Understand and apply best practices in effective customer service
- Collaborate/partner with the user in the information-seeking process
- Work well with diverse users who possess varying skill levels
- Communicate effectively in synchronous online reference situations (i.e., chat)
- Communicate effectively in asynchronous online reference situations (i.e., e-mail)
- Communicate effectively in face-to-face and telephone reference situations
- Conduct an effective reference interview that investigates a user's stated and unstated research needs
- Construct effective database searches and instruct users in effective techniques
- Create research and bibliographic tools
4. Collections Management
Please rate your current knowledge, skills, and abilities in the following areas:

- Understand current economic and market issues that affect collection development
- Understand how to represent needs of specific areas within the context of larger collection needs
- Look for collaborative ways to accomplish collections goals, such as pooling money or selecting common resources
- Understand the publication trends and develop familiarity with publishers in assigned or relevant areas
- Evaluate resources in terms of the University of Minnesota Libraries' curricular and research needs; select and manage resources in all formats in assigned or relevant areas
- Strategically assess and make decisions regarding the acquisition, retention, and preservation of collections
- Understand and evaluate a license agreement
- Compile data and information about collections in assigned or relevant areas and update it regularly (e.g., usage data, expenditures, price increases over time, gifts received in ASC)
- Effectively use the acquisitions component of integrated library system
- Track and effectively manage collections budgets
- Understand and effectively use selection and approval tools
- Know what kinds of collections reports can be generated and use these reports to monitor and guide selection
- Develop and maintain foreign language competencies appropriate to the University of Minnesota collections and the needs of its researchers

5. Liaison/Relationship Building/Communications
Please rate your current knowledge, skills, and abilities in the following areas:

- Maintain awareness of current trends in assigned or relevant disciplines
- Maintain awareness of departmental focuses for research and teaching in assigned or relevant areas
- Proactively develop working relationships with faculty in assigned or relevant areas, identifying opportunities to collaborate on projects, services, and collection decisions
- Proactively develop working relationships with administrative staff in assigned or relevant areas
- Develop working relationships with students in assigned or relevant areas
- Learn about and support the information needs of research groups
- Participate in the development of new tools and services in response to user needs
- Effectively communicate library and information-related news and issues to appropriate audiences in group or one-on-one interactions
- Promote library services and collections to the university and outside communities
- Perform a user needs assessment
- Analyze the data from a user needs assessment

6. Archives and Special Collections
Please rate your current knowledge, skills, and abilities in the following areas:

- Understand and apply the generally accepted theories, standards, and professional practices relating to materials in archives and special collections
- Understand the nature and value of primary research and the significance of original artifacts
- Understand the purpose of finding aids and other access tools for archives and special collections materials
- Develop and maintain in-depth knowledge of the bibliographic, historical, cultural, and institutional aspects of the University of Minnesota archives and special collections
- Maintain familiarity with and selectively implement the technologies that are key to management and dissemination of archives and special collections materials
- Promote an appreciation and use of archives and special collections materials to a variety of audiences
- Actively engage with faculty and other librarians to integrate use of archives and special collections into the curriculum
7. Technology
Please rate your current knowledge, skills, and abilities in the following areas:
- Maintain awareness of new technologies and their potential applications in libraries and higher education
- Maintain awareness and understanding of the technologies that are currently employed in libraries and higher education
- Understand technological tools that are broadly used by University of Minnesota communities
- Seek opportunities to train in new or unfamiliar information technologies
- Integrate use of relevant current technologies and tools into everyday practice
- In response to user needs, identify new tools that could be developed
- Critically evaluate effectiveness of technologies and tools
- Demonstrate the value of technological tools to users and colleagues
- Effectively use productivity applications (e.g. word processing, spreadsheets)
- Effectively use social networking tools such as blogging and social bookmarking
- Effectively use instant messaging tools
- Effectively use LibData
- Effectively use wikis
- Have a basic understanding of web site design

8. Scholarly Communication
Please rate your current knowledge, skills, and abilities in the following areas:
- Understand the basic issues in scholarly communication
- Be aware of the scholarly communication differences among disciplines
- Possess a basic understanding of copyright law
- Possess a basic understanding of a variety of publishing models, including open-access
- Understand issues surrounding authors’ rights
- Understand the basic roles of the University Digital Conservancy and when to recommend that faculty submit their publications
- Understand the tenure process as it relates to publishing, including the issue of impact factor
- Communicate scholarly communication issues in a balanced way that can be adjusted to meet the needs of a wide range of audiences
- Advocate for sustainable models of scholarly communication
- Assist in the development and creation of tools and services to facilitate scholarly communication
- Assist scholars in identifying publications that allow them to retain their rights
- Advise scholars on how they may manage the articles, preprints, etc. that they gather
- Advise scholars on how they may manage their data
- Discover and recruit institutional scholarly output, research data, and other content for inclusion in the University Digital Conservancy

9. Leadership
Please rate your current knowledge, skills, and abilities in the following areas:
- Share expertise with colleagues and administrators to further Libraries and University goals
- Consider the risk, benefit, and impact of decisions on the present and future library environment before taking action (maintain a system-wide perspective)
- Collaborate successfully within a larger organization and with external partners as appropriate
- Advocate for the library on campus
- Develop individual goals that are strategic and support Division-wide and Libraries-wide goals
• Respond to changing needs by taking on short-term responsibilities that move the Libraries forward
• Understand and apply project management skills
• Understand and apply program development skills
• As a group member, contribute actively and constructively to help the group achieve its goals
• Facilitate meetings that are focused and productive
• Manage conflict between members of a group
• Structure discussions, situations, and assignments to encourage creativity
• Ask open-ended questions, listen actively, and respond in an open, constructive manner
• Build consensus among the members of a group
• Support group decisions and outcomes through actions and communications
• Mentor newer staff

10. Professional

Please rate your current knowledge, skills, and abilities in the following areas:

• Provide library colleagues with constructive feedback
• Request feedback and use it to make improvements
• Identify and take advantage of opportunities for professional growth and development
• Understand and employ effectively principles and techniques of marketing
• Identify grant opportunities
• Write effective grant proposals
• Participate in departmental, college, and campus committees
• Effectively manage time and set priorities for assigned responsibilities
• Set priorities, create plans, and establish a schedule for professional activities
• Develop collaborative relationships within the library profession
• Know the basics of using statistics and understand their misuse
• Have a basic understanding of research methodology
• Write for publication

• Create effective professional presentations
• Present information or data in an understandable format
• Work comfortably in a multicultural environment
• Communicate effectively with diverse groups, including those whose first language is not English
• Cultivate relationships with donors and potential donors of funds and collections
• Understand the principles of censorship and intellectual freedom
• Engage in self-reflection to assess personal strengths and weaknesses