

# External and Internal Communications Research and Educational Support DRAFT

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## **Scope of this document**

This document summarizes communication plans for launching the new Research and Educational Support division in the ULS. It addresses the needs for both internal ULS communications and external communications with the target user communities on and off campus.

Responsibility: the Concept, Vision and Roadmap Transition Team on behalf of the ULS User Services Task Force

## **Description and benefits of the new service**

### **Vision and mission of Research and Educational Support**

Appendix A contains the text of the vision and mission statement. The statement is intended for consideration in developing communications materials and redesigning the ULS web site in FY13, as the pages of the ULS site describing faculty and student services are adapted to promote our revitalized outreach and in-library services.

The combined vision and mission statement directly address the reader. The intent of doing so is to emphasize that the starting point for the design and delivery of user services is the University of Pittsburgh community, rather than the means or methods (collections, services, systems) we currently deploy for meeting their needs.

### **Service concept**

Appendix B contains a concept description--a high-level view of the strategic context of the new division, the intent of the service model, and its benefits for faculty, researchers, and students.

### **Position description frameworks**

The User Services Task Force created the Position Description Framework Transition Team to develop the two position description frameworks. Position description frameworks define potential roles and provide the basis for preparing new job descriptions that integrate new and existing responsibilities at an individual level. Appendix C contains the position description framework for liaison librarians. Appendix D contains the position description framework for those staffing a single service desk.

While there are separate frameworks for these roles, librarians and staff working in these areas will interact closely. The frameworks are working documents that will continue to evolve as university community needs change.

### **Linkages to/integration with ULS libraries, divisions and services**

The Research and Educational Support (RES) division will be created by merging librarians and staff from Hillman Reference and Instructional Services, Collection Development, and units within Access Services. Following the creation of RES, Collection Development and Hillman Reference/Instruction will no longer exist.

The liaison librarian program is intended to be ULS-wide in scope, with bibliographers and public services librarians from Hillman and departmental libraries taking part. ULS departmental and regional libraries already have single service desks; this concept will be extended to create a single service desk in

Hillman. Staffing for the Hillman single services desk will come from the former Hillman Reference and Instruction Group and from circulation, reserves, and ILL/document delivery groups in Hillman.

### **Alignment with ULS vision, mission, long range plan, strategic actions**

The creation of RES evolved from goals and objectives in the ULS Long Range Plan and more specifically, actions laid out in the FY12 Planning and Budget Reports. RES came about as a result of initiatives to evaluate and redesign ULS user services to set a new standard for excellence, adapt services to the changing needs of our user demographic, and increase user satisfaction.

### **Target markets and stakeholders**

Subgroup: Clare Withers, Kate Joranson, Jeanann Haas, Crystal McCormick Ware

## **Desired outcomes of the communications—external and internal**

### **Internal**

- Awareness of the change
- Understanding and support for the change
- Willingness to take up new roles and responsibilities in RES

### **External**

- Create awareness of RES outreach and in-library services in target markets
- Understanding and perception of value of RES services by target markets
- Willingness to try RES services among target markets

### **Communications timeline**

Subgroup: Eliva Arroyo-Ramirez, Marnie Hampton, Eugene Sawa, Marc Ross

### **When new services will be delivered**

### **Schedule of internal communications**

### **Schedule(s) for external communications, announcements, promotions**

### **Branding and positioning**

Subgroup: Heidi Card, Crystal McCormick Ware, Karen Calhoun

**Tag line**

**Unique advantage compared to alternatives**

**Promotion strategy, channels and roll-out**

**“Communications kit” for ULS liaison librarians and single service desk staff**

## **Roadmap**

Subgroup: Kate Joranson, Karen Calhoun

## Appendix A: Vision and Mission Statement



### **ULS Research and Educational Support** **Supporting you from information to insight**

Your library is about you—trust us to be your partner, helping to find the information you need to succeed in courses, teach, develop research, or ensure the discoverability of your scholarly publications. We provide expert assistance online and in our campus and regional libraries, saving you time. Wherever you engage us, you'll find what you need to transform information into knowledge, learning, insight and action.

## Appendix B: Service Concept

### *Redesign of ULS User Services*

The University Library System is tracking and responding to fundamental shifts in the nature of scholarly collections and radical change in the information-seeking practices of scholars and students. The ULS Long Range Plan and FY12 strategic plan call for extending and strengthening our essential role in supporting and advancing teaching, learning and research at the University of Pittsburgh. To that end, and through an inclusive planning process to which many contributed, we have embraced innovative strategies to align what we offer with the transformed requirements and scholarly practices of those we serve.

The following description briefly introduces our new Research and Educational Support division, whose service model, role and purpose involve more deeply and productively engaging and integrating library expertise and resources into 21<sup>st</sup> century practices and preferences for teaching, learning, and research.

### *The New Service Model and Its Benefits*

The service model of Research and Educational Support significantly expands library outreach, enabling our librarians to liaise and engage proactively with faculty and students in support of superior learning outcomes, success in degree programs, the creation of new knowledge, and pioneering research outcomes. Liaison librarian programs are well established models for revitalizing library support for research and education.

We will create the ULS liaison librarian program by evaluating subject assignments already in place, then expanding and adding to cover the full range of the University's academic pursuits, to the extent possible. In addition to having current knowledge of the priorities and research interests of specific departments and programs, liaisons are intended to network, strengthen relationships, maintain open communications, and provide focused, customized service to individuals, schools, departments, centers, and university programs.

In addition the Research and Educational Support division expands the use of convenient, one-stop service desks to all ULS libraries including the main library, Hillman. Unified desks more efficiently and cost-effectively field questions of all types both in person and virtually, provide ready reference, and support circulation, reserves, and delivery services. A system of referrals to the liaison librarians ensures that in-depth research questions continue to be answered by those with the appropriate subject expertise.

Delivering these benefits to the university community requires changes in the roles and responsibilities of our librarians and staff. Blending formerly separate into our new division is refreshing our sense of shared purpose and commitment to mission. To capture these new roles and responsibilities, we have prepared two “position description frameworks”—one for liaison librarians and one for those who will staff the reconfigured service desks. These position description frameworks define and integrate traditional and new roles and responsibilities and are the basis for preparing new job descriptions.

## Appendix C: Liaison Librarian Position Description Framework

### ULS Liaison Librarian Position Description Framework

*Academic libraries must now reexamine their staffing strategy and organizational structure in light of the rising pressures, disruptive competitors, and new demands that have emerged over the last decade. The most promising roles for library staff are bound together by a commitment to moving beyond traditional library spaces and thematic boundaries and into more active support of the academic mission.*

“Redefining the Academic Library: Managing the Migration to Digital Information Services” Washington, DC: Education Advisory Board, 2011.

<http://www.educationadvisoryboard.com/pdf/23634-EAB-Redefining-the-Academic-Library.pdf>

#### Introduction

This position framework outlines a new structure for outreach that will change the focus of the work done by the ULS faculty librarians away from one that is collection-centered towards one where their knowledge, skills, and abilities are more closely aligned with both the vision articulated in the Long Range Plan of the ULS (noted in italics below) and the teaching and research mission of the university. While all of the activities listed below will not be reflected in every new Liaison Librarian position to be written, this list does reflect appropriate responsibilities from which the selection will be made. Moving forward, it is important to think about position descriptions as living documents that will be updated as needed so that we continue to be aligned with the needs of our community.

This change will not happen overnight; the transition from the existing structure into job descriptions with new responsibilities will take time to fully implement. However, once completed this change will allow librarians to more actively participate in the overarching focus of the ULS which is to *re-envision library services to better support teaching and learning and enhance user satisfaction*, a goal that is repeated throughout this document as one that can be achieved through outreach to faculty, students, and staff under the broad heading of campus engagement. Campus engagement can be loosely defined as any professional work in which the librarian seeks opportunities to better serve the needs of the user. This purposeful kind of outreach can be beneficial to both the department/school and the ULS: the liaison librarian can integrate knowledge of resources and services by working closely with the user, and through these interactions we can learn more about how the collections and services of the library can better meet the needs of the faculty, students, and staff.

Cultivating relationships through campus engagement will also *increase external communications and raise awareness* by utilizing the liaison librarians as a primary communications channel in order to highlight the library’s collections and services, including special and digital collections. Reaching out to user communities through both the physical and virtual environments will provide liaison librarians an opportunity to speak knowledgeably about issues such as scholarly communication, digital collections, and information literacy.



Duties within this framework include traditional tasks such as collection development but elaborate on other activities that encompass changes consistent with a user-centered service environment. Listed below are the types of activities liaison librarians may be incorporating into their daily tasks.

### **Campus Engagement**

- Cultivate partnerships, and actively work towards establishing productive relationships with departmental faculty, staff, adjuncts and visiting professors, and students in order to integrate the library's resources in curricula and research projects.
- Promote library services and collections through a variety of channels, including social media to connect with undergraduates, graduates, faculty, and researchers.
- Speak knowledgeably about relevant issues such as scholarly communication, open access, institutional repositories, digital collections, and information literacy.
- Seek opportunities to collaborate and establish partnerships with faculty members and departments.
- Analyze trends in departmental teaching and research programs.
- Stay abreast of scholarship in disciplines themselves to respond to departmental needs.

### **Leadership and teamwork**

- Embrace an environment of continual professional development, improvement and learning; thus remaining current in the field and supporting others in doing so as well.
- Maintain understanding of ULS priorities, goals, and programs.
- Contribute to the goals and strategic initiatives of the University Library System through active participation in ULS collaboratives.
- Share expertise with colleagues and administrators to further University Library System goals.
- Be able to refer users to appropriate specialized services elsewhere
- Seek opportunities to address local, regional, and national organizations such as ACRL and ALA, to foster better communication and understanding of each other's programs and services.
- Pursue partnerships with other on-campus organizations (e.g., CIDDE, the Writing Center)
- Identify areas where new online learning and digital tools can place the library into the flow of teaching, learning, and research.
- Advance academic unit, library, and university goals.

### **Teaching/Learning**

- Engage faculty and other teaching staff to integrate information literacy concepts and skills into the curriculum.
- Deliver effective instructional sessions; and/or provide learning opportunities such as LibGuides, train-the-trainer sessions, or research consultations.
- Engage in reflective teaching through use of instructional improvement tools such as peer evaluation or teaching portfolios.
- Deliver information literacy instruction in accordance with ACRL standards in the classroom, the online environment and through faculty partnerships.
- Maintain up-to-date knowledge of relevant curriculum initiatives within the University of Pittsburgh.

- Develop and maintain an awareness of the information needs and information-seeking habits of college students.
- Conduct needs assessment as appropriate and selectively measure instructional outcomes in order to ensure effectiveness of instructional initiatives.

### **Research Services**

- Provide high quality reference and research support on demand by appointment, email, chat, or other venue.
- Collaborate on the development of a dynamic online service environment to engage users with library collections and services.
- Extend services through office hours, embedded librarianship, and support of undergraduate honors researchers.
- Participate in the promotion of library services and materials.

### **Scholarly Communication**

- Educate and inform faculty, staff, and students about scholarly communication issues. Examples include helping faculty and graduate students understand their rights as authors.
- Explain the ULS's Open Access policies and promote use of D-Scholarship, the university's institutional repository.
- Demonstrate competency on broad issues of copyright and how to responsibly use resources in an academic setting.

### **Content and collections**

- Ensure curriculum-aligned collection management.
- Manage collection funds efficiently, effectively and in a timely fashion.
- Strategically assess and make decisions regarding the acquisition, retention, and preservation of collections.
- Collaborate in the design, implementation, and maintenance of relevant online tools and services to better meet the needs of library patrons.
- Discover and recruit institutional scholarly output, research data, and other content for inclusion in ULS digital initiatives.

## Appendix D: Single Service Desk Position Description Framework

### Single Service Desk Position Description Framework

#### Introduction to the Framework

In response to the library's changing environment, in FY12 the ULS convened a User Services Task Force (USTF) to develop a new model for user services and produce a set of strategic options for the overall ULS FY13 plan. Over the course of the fall 2011 term, this group conducted a strategic options analysis that included review of university and ULS planning documents, small group discussions, readings, presentations, a Future Search conference, and separate presentations by colleagues from the University of Minnesota and Syracuse University.

Upon completion of phase 1 of this process, the task force identified four main objectives that are pertinent to the construction of this framework: user-centered services in Hillman Library; the Hillman Library ground floor redesign; the development of a library liaison model; and the necessity of highlighting and building our collections. During phase 2 of this process, the USTF created two transition teams to carry out implementation tasks. One team, the Position Description Framework team, was charged with developing two frameworks: one for library liaisons and one for staff at a single service desk. While there are separate frameworks for these positions, librarians and staff in this area will interact closely.

The single point of service desk provides a host of services including: traditional circulation and reserve activities, help in finding books and articles, and assistance in using information technology for ebooks and in the collaborative work areas in the library. Through this single point of service, staff members will also ensure that in-depth questions, problems or projects are appropriately referred to library liaisons.

#### Intent

This document is designed to provide an outline of the areas of responsibility for staff at the new 'single service desk.' Duties within this framework include traditional library skills (circulation, reserves, intra and inter library loan, basic reference and information skills) and other workplace and technology skills consistent with a user-centered public services environment. This framework is not exhaustive. As jobs evolve in this new environment departments and/or individuals may need to revise or expand these guidelines, and appropriate training will be provided.

#### Competencies

The single point of service will be for many the public face of the University Library System. It is critical that the staff at the desk be welcoming and respectful. A review of the list of competencies attached to the Library III classification that has been developed by the ULS for use in developing job descriptions and reviewing staff performance. These competencies must be considered in the formulation of job

descriptions and goals for staff members at the single service desk. Competencies for a Library III position include: approachability, decision quality, functional/technical skills, interpersonal communication, planning, problem solving, service orientation, and time management.

### **Roles and Responsibilities for the Single Service Desk**

Included here are roles and responsibilities that may—depending on the mix of assignments for a particular individual—appear in a job description of a person working at a single service desk.

#### **“Ask Us” Services**

- Provide high quality ready reference and directional reference service on demand, typically at a walk-in desk or via email, chat, phone, or other virtual reference tool
- Understand and refer requests for customized or expert reference and research services to appropriate liaison librarians or other ULS libraries
- Possess skilled catalog searching skills, both PITTCat Plus and staff catalog views
- Provide basic guidance and instruction in searching the catalog and selecting pertinent high-use scholarly databases
- Know the content and assist users in navigating the ULS web pages, providing guidance in requesting items through relevant services: Get It, EZ-Borrow, Interlibrary Loan, etc.
- Be able to provide basic group instructional sessions utilizing a prepared script
- Be able to locate items using Library of Congress standard subject headings and classification system
- Acquire and maintain a basic knowledge of locations/content/policies of collections across the ULS to assist users in obtaining appropriate research material efficiently. (e.g., various Hillman collections, departmental libraries, regional campus libraries, archives, special collections, D-Scribe Digital Collections, etc.)
- Be able to refer users to instruction programs and other services as needed

#### **Content /Collections (Circulation, Reserves, Collection Locations)**

- Provide excellent customer service to all users of the single service desk
- Understand and be able to articulate and explain circulation/reserve policies
- Know and be able to perform standard circulation functions (check in, check out, renew, holds, know loan periods, be able to accept fines, etc.)
- Troubleshoot routine problems with circulation (fine disputes, late returns, lost and damaged materials, etc.) while maintaining a positive attitude.
- Effectively use patron-related functions in Voyager
- Know and be able to perform standard reserve functions
- Know the locations of collections, including storage
- Understand ULS digital collections and how to access them
- Be able to troubleshoot routine e-access problems particularly for off campus access; e.g., S-remote
- Understand and be able to explain storage policies and practices
- Basic understanding of materials workflows (on order, missing, rush, etc.)
- Understand how to refer circulation/reserves questions or problems and to whom

### **Communications and Interpersonal Skills**

- Assess and deal with problems involving patrons in an effective and positive fashion
- Develop and maintain a strong service orientation dedicated to providing excellent customer service at the desk
- Know and follow policy for handling security issues and reporting incidents
- Basic knowledge of local equipment, facilities, staff, and emergency procedures
- Work with liaison librarians to provide a collaborative, team-focused working environment at the service desk and in the library commons

### **Leadership and Teamwork**

- Contribute to the goals and strategic initiatives of the libraries through active participation in the annual strategic planning cycle, revision of existing policies, appropriate ULS groups and meetings
- Display positive drive and purpose in interactions with colleagues; collaboratively contribute to carry out the mission of the ULS to support teaching, learning, and research at the University
- Maintain current awareness of trends and developments in knowledge commons; seek continuous improvements in professional skills and competencies
- Value diversity and difference; strive to be open-minded and adaptable in thought and actions