

ENGAGING WITH LIBRARY USERS: SHARPENING OUR VISION AS SUBJECT LIBRARIANS FOR THE DUKE UNIVERSITY LIBRARIES

PREPARED BY THE TASK FORCE ON SUBJECT LIBRARIAN RE-VISIONING

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APPROVED BY THE COLLECTIONS
AND USER SERVICES COUNCIL
JANUARY 14th 2011

“Many believe that liaison librarian functions are becoming more central to fulfilling the library’s mission in a digital age. While research libraries may agree on the importance of the position, how to reconfigure liaison work has become a topic of broad concern. Identifying emerging roles and determining how to develop corresponding liaison capabilities are common challenges.”

Karla Hahn. “Introduction: Positioning Liaison Librarians for the 21st Century.”
Research Library Issues: A Bimonthly Report from ARL, CNI, and SPARC, no. 265 (August 2009): 1–2. <http://www.arl.org/resources/pubs/rli/archive/rli265.shtml>.



Like many ARL institutions, the Duke Libraries are grappling with how to respond to the changing landscape of higher education and the resulting changes in library collections and services. Liaison librarians (subject librarians) are at the forefront of interacting with faculty, students and researchers; their roles have been changing and will probably remain in a state of continuous change. The Libraries’ strategic plan, *Sharpening Our Vision*, notes that “[t]he Duke University Libraries will strengthen their role as an essential partner in research, teaching and scholarly communication.” Liaison librarians are uniquely positioned to move these partnerships forward.

This document is an effort by the Collections and User Services Council (CUSC) to articulate the changing role of the subject specialist and to help subject librarians define their evolving responsibilities. It is based on the pioneering work done at the University of Minnesota Libraries, whose *Librarian Position Description Framework* served as the inspiration for our re-visioning of subject librarian roles; we note in particular their shift from a collection-centered to an engagement-centered model. We are grateful to Karen Williams, Associate University Librarian, for her willingness to share information about the UM process. Conversations with colleagues at Columbia, Cornell, and ARL also informed our process. In addition to the University of Minnesota framework, we used the “Subject Librarian Job Descriptions” document approved by CUSC’s predecessor, Collections Council, in 2007.

Our engagement-centered model embraces the concept that subject librarians, like all library staff, have leadership responsibilities regardless of their position within the Duke University Libraries. Leadership on the part of subject librarians includes activities such as contributing to goals and strategic library directions through active participation on committees and task forces, locally, nationally and internationally, and sharing expertise throughout the library in order to further library and university priorities.

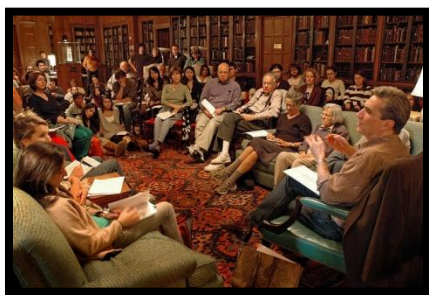
The order of the responsibilities described in this document is deliberate. We believe that engagement is fundamental to the work of subject librarians. Other aspects of subject librarian roles that are critical parts of all subject librarian positions are Teaching and Learning, Research Services, Collection Development, Digital Tools, and Scholarly Communication. The additional categories listed, such as Technical Services, will not be part of the position descriptions for all subject librarians; those responsibilities depend on the nature of the particular position, the needs of the library department and the needs of the Libraries. How the subject librarian role is configured is based on the needs of the library and the university; it is not a matter of personal preference.

We envision this document being used in many ways, including:

- As the starting point for conversations throughout the Libraries on the role of the subject specialist.
- As a basis for assessing the readiness of staff to take on new responsibilities; a survey of staff training needs will follow.
- As a source of language that can be incorporated into position descriptions and annual performance goals.
- As a supplement to the *Duke Libraries Bibliographers Handbook* (1991).

For each area of subject librarian responsibility, the document includes (1) a summary statement suitable for use in job descriptions; (2) more detailed actions that flesh out the summary statement; and (3) examples of best practices.

ENGAGEMENT



Serve as primary liaison to subject area(s) faculty and users; take initiative to identify, meet, and facilitate ongoing communication about their resource needs and service expectations.

- Actively engage with faculty students and staff in assigned departments or institutes in order to develop strong working relationships.
- Promote library services and collections.
- Speak knowledgeably about issues such as scholarly communication, open access, institutional repositories, digital collections, and information literacy.
- Assess user needs, design and implement user studies, share information about users with library staff and with departments or institutes.

- Analyze trends in assigned discipline or area’s research and teaching; be aware of department or institute’s current and future programs; use information to respond to user needs.
- Seek opportunities for collaboration with departments or institutes in the areas of collections (e.g. creating digital collections; contributing to institutional repository), teaching, and research.

BEST PRACTICES INCLUDE:

- Meeting regularly with faculty and administrators.
- Participating in department meetings, activities, and events such as seminars, colloquia, and conferences.
- Seeking professional development opportunities in subject areas (e.g. participating in scholarly organizations).
- Developing studies to assess faculty and student research tools and methodologies and using the results to shape collections and services.
- Conducting (and attending) workshops on specific database or technological innovations that can be used in teaching or research.
- Regularly reading literature, such as *Chronicle of Higher Education*, about trends in higher education, subjects, and disciplines, and sharing information with colleagues.
- Engaging with library colleagues to share information about disciplinary trends and department/institute activities.
- Participating in appropriate subject librarian discipline groups.
- Attending Bibliographers Forum on a regular basis.

TEACHING AND LEARNING

Design and implement strategic and pedagogically appropriate instruction for library users through a variety of methods.



- Engage faculty and other teaching staff to integrate information literacy concepts and skills into the curriculum.
- Develop plan to deliver strategic and effective instruction.
- Develop instructional programs and learning materials in a variety of formats, using instructional design principles.
- Deliver effective instructional sessions; and/or provide alternate learning opportunities such as LibGuides, train-the-trainer sessions, or research consultations.
- Assess student learning in library instruction sessions; use results to improve instruction.
- Engage in reflective teaching through use of instructional improvement tools such as peer evaluation or teaching portfolios.

BEST PRACTICES INCLUDE:

- Examining the schedule of classes each semester; identifying core/foundational, research methods, and capstone courses; contacting appropriate faculty.
- Meeting with directors of undergraduate studies and directors of graduate studies on a regular basis.
- Attending departmental meetings to learn about curriculum and talk about instruction.
- Attending Instructors Forum on a regular basis.
- Creating student learning outcomes for library instruction sessions, using easy assessment methods to evaluate student learning, and using results to improve instruction.
- Identifying and using new technologies in order to understand how they are being used for teaching and learning.
- Analyzing department or institute curriculum; identifying and targeting critical courses for library instruction.

RESEARCH SERVICES



Provide in-depth, specialized research consultation and reference for Duke University Libraries users.

- Provide assistance and instruction in finding and evaluating information.
 - Provide assistance in accessing library resources and services.
 - Answer questions in person and through e-mail, phone, and instant messaging.
 - Provide consultations for subject or other specialized areas of expertise (e.g. data services, open access, citation management).
- Extend services through office hours, embedded librarianship and support of undergraduate honors researchers.
 - Document and analyze data on research transactions.
 - Participate in the promotion of library services and materials.

BEST PRACTICES INCLUDE:

- Participating in staffing the Reference or Lilly desk and instant messaging service.
- Holding office hours in a department or institute.
- Meeting with undergraduate honors researchers early and throughout their process to offer assistance.
- Documenting user success for other researchers, such as best practices videos created for History undergraduate honors students or writing a post in LibraryHacks or the Instruction blog.

- Analyzing LibStats, web logs, or other methods of data tracking to better understand user behavior and making recommendations on how to improve our services or interfaces.
- Working with ILL to borrow materials needed by patrons.

COLLECTION DEVELOPMENT

Develop and manage collections to support research and instruction in subject area(s) by formulating policies and selecting materials in relevant formats and languages.



- Select material in relevant formats and languages to serve the research, teaching and learning needs of the Duke University academic community.
- Develop cooperative collection development relationships within the Triangle Research Libraries Network (TRLN) and lead Duke's participation in national cooperative projects.
- Manage collection funds effectively and in a timely manner.
- Analyze collection characteristics and collection usage data to better serve regional, national and international users.
- Discover and recruit institutional scholarly output, research data and other content for inclusion in the Libraries' digital initiatives.
- Develop and maintain relationships with dealers and donors (of both in-kind and monetary gifts).

BEST PRACTICES INCLUDE:

- Reviewing serials subscriptions and standing orders and approval plans on a regular basis to make sure that they reflect current research and scholarship.
- Monitoring approval plans.
- Using collection management software (e.g. Worldcat Collection Analysis).
- Analyzing subject area or discipline in order to inform collection development.
- Adhering to acquisitions calendar.
- Communicating effectively with acquisitions, subject librarian coordinator, and head of collection development.
- Participating actively in special projects such as serials cancellation.

DIGITAL TOOLS



Promote use of subject-specific information resources and services to meet user needs and expectations, utilizing current technologies and information tools.

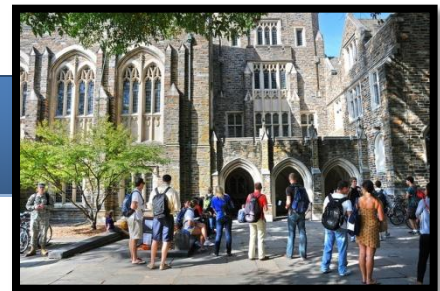
- Identify areas where new online learning and digital tools can place the library into the flow of teaching, learning, and research.
- Participate in the coordination and integration of online tools in support of teaching, learning, and research.

BEST PRACTICES INCLUDE:

- Creating and maintaining appropriate online guides.
- Working with Instruction & Outreach and the Center for Instructional Technology (CIT) to ensure that online course and subject guides are integrated into learning management systems.
- Keeping up with emerging technology issues among faculty.
- Communicating with and learning from colleagues on emerging technologies.
- Keeping abreast of data management issues within assigned department(s) and being able to recommend consultants for referrals.
- Testing tools and working collaboratively to solve technology problems.
- Contributing to technology implementation efforts.

SCHOLARLY COMMUNICATION

Educate and inform faculty, graduate students and campus administrators on issues of scholarly communication.



- Monitor patterns of research and emerging issues in scholarly communication.
- Demonstrate competency on broad issues of copyright and how to responsibly use resources in an academic setting.
- Explain Duke's Open Access policies and promote use of the Institutional Repository (IR) with faculty and graduate students.

BEST PRACTICES INCLUDE:

- Helping faculty and graduate students understand their rights as authors (e.g. that they can alter contracts to include retaining rights to distribute their own work in classes and on personal websites).
- Advocating with authors and editors for sustainable models of scholarly communication.
- Keeping up with current research in disciplines and areas of study and communicating emerging trends in modes of scholarship with library colleagues.
- Conducting assessments/surveys/studies on a regular basis in concert with CIT colleagues to gauge faculty and graduate student modes of research and teaching in specific departments and institutes.
- Serving as a liaison between the IR and campus constituents in departments and institutes to foster adoption of the IR as a scholarly communication tool.
- Assisting in IR content recruitment (e.g. identifying citation analysis tools to harvest new publications, identifying digital resources on campus that merit sustained access and require long-term preservation, actively encouraging faculty to add new publications to the University's faculty database).
- Understanding basic copyright principles and recognizing basic areas of application (e.g. fair use scenarios and face-to-face teaching exemptions).
- Referring constituents to the Scholarly Communications Officer when appropriate after an initial response to queries.

TECHNICAL SERVICES [Tasks depend on particular position] _____



Work with staff in library Technical Services departments to ensure accurate and easy access to scholarly resources.

- Work with technical services to improve discovery tools and interfaces.
 - Work with Acquisition specialists on managing funds.
 - Support the creation of digital collections by selecting materials and contributing specialized expertise to their processing.
- Perform copy-cataloging and assist with original cataloging of materials in specified language(s).

BEST PRACTICES INCLUDE:

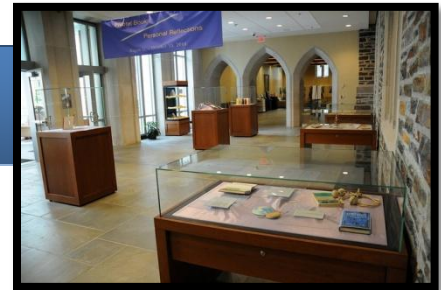
- Submitting orders in a regular and timely way according to schedule.
- Providing sufficient bibliographic and, when appropriate, vendor information for orders.
- Assisting Acquisitions by contacting vendors to resolve problems for materials vended overseas.

- Negotiating with vendors concerning prices, discounts, and licensing for materials produced abroad.
- Working with vendors to get new book information in a format that streamlines the workflow of Acquisitions.
- Providing assistance to Acquisitions in vendor selection, romanization and verification of prices for out-of-print materials.
- Reporting problem links.
- Testing databases and systems.
- Incorporating user feedback to improve interfaces for both local configurations and at the database level.
- Recommending metadata fields for digital collections.
- Reviewing metadata for digital collections.
- Advising on interfaces for digital collections.
- Working closely with Acquisitions specialists in managing (allocating) funds.
- Acting as liaison between users and Technical Services to ensure access to library materials.

EXHIBITS [Tasks depend on particular position]

Work with exhibits coordinator to plan, execute and mount exhibits.

- Identify potential topics for exhibits or events that promote services or collections or support campus goals.
- Work with the exhibits coordinator to understand and execute planning, mounting and content issues.
- Plan and execute events such as opening reception.
- Work with exhibit coordinator to create an on-line version of all exhibits.
- Work with the communications officer on publicity.



BEST PRACTICES INCLUDE:

- Identifying who should be targeted by the publicity.
- Procuring approvals for mounting images in an online exhibit.
- Writing text that appeals to a wide audience to explain the exhibit.
- Finding partners to co-sponsor the exhibit or event.
- Creating and adhering to timeline in conjunction with exhibits coordinator.

FUNDRAISING/GRANTS MANAGEMENT

[Tasks depend on particular position]



Participate in development and fundraising efforts and cultivate relationships with established and potential donors as appropriate.

- Participate in development and fundraising efforts and cultivate relationships with established and potential donors as appropriate.
- Work closely with university programs by providing data for grant applications, managing grant funds for library materials, and reviewing applicants for travel awards.

BEST PRACTICES INCLUDE:

- Selecting materials that support the goals of the grant and spending funds in a timely way.
- Assisting library development by providing information about how funds could make a difference to the students and faculty at Duke.
- Writing an annual report on materials purchased with grant or endowment funds, and providing statistics on materials purchased and assessing their use.
- Reviewing applicants for travel grants, working with them during their visit and providing a report assessing the benefit of the travel grant.

OUTREACH TO CONSTITUENCIES BEYOND DUKE UNIVERSITY

[Tasks depend on particular position]

Participate in programs that reach out to groups beyond Duke to fulfill special program requirements (e.g. Title VI) as part of the Libraries' participation in groups such as the Association of Southeastern Research Libraries, or to promote library services and collections to support the mission of the library.



BEST PRACTICES INCLUDE:

- Reaching out to faculty at other institutions in North Carolina and throughout the Southeast, promoting the use of Duke's collection, and providing reference assistance to faculty and students not at Duke.

- Providing workshops on free databases for scholars not at Duke.
- Contributing to the efforts of the area studies centers to serve as National Resource Centers and support their outreach efforts.
- Developing collaborative programs with K-12 librarians.
- Curating digital collections in order to make resources widely available.