University of Massachusetts Amherst

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Winter December 1, 2015

Final Report of the Learning Commons Assessment Task Force

Sarah C Hutton
Jessica Adamick, University of Massachusetts - Amherst

Available at: https://works.bepress.com/sarah_hutton/12/
Learning Commons Assessment Task Force
Final Report and Recommendations to be Submitted to the Provosts Learning Commons Committee
September 29, 2015

Report Compiled by Committee Members

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Carol Will
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Presented to PLCC Dec 1, 2015
EXECUTIVE SUMMARY

This report follows the structure outlined by the Learning Commons Assessment Task Force charge to make recommendations to the Provost’s Learning Commons Committee for major renovations and restructuring of space and services provided in the UMass Amherst Learning Commons. These recommendations include results from assessment undertaken by the task force and collaborators, literature review, and site visits to comparable institutions with learning and/or information commons models. Also included are floor plans and overviews of floor layout for the reinvention of the Learning Commons on the Lower Level of the W.E.B. Du Bois Library.

The Learning Commons Assessment Task Force (LCATF), in operation for nearly two years, has conducted extensive research, multiple site visits, and many different types of qualitative and quantitative data gathering to inform recommendations for large-scale change to the Learning Commons (LC) in the W.E.B. Du Bois Library. These changes are broken into a phased implementation process, which the group feels is the best approach to a project of this scale, given the amount of disruption it will cause to student use of the space and amount of organizational change that will be necessary to accommodate new directions for the Libraries. These recommendations are based on what the group feels is the best direction, moving toward optimal support of our main constituency, the undergraduate student, while not overlooking our graduate students, faculty, staff, and patrons from the Commonwealth.

Below is an infographic of the projected timeline of this project:
The recommendations are broken into three categories: 1) short-term (commencing immediately), 2) mid-term (within the next 18 months), and 3) long-term (two or more years out). For additional details related to these recommendations, please see the Final Recommendations Section on page 31.

Short term/Phase I (to commence immediately):

The Learning Commons is a collaboration of both internal and external partners. Current partners include:

- Learning Commons staff (available 24/5)
- Information Technology staff including User Services and Computer Classrooms, as well as the separate Assistive Technology Center (Desk staffed 24/5, Assistive Technologies open 24/5 with consulting & support services available by appointment
- Circulation Reserves (available 24/5)
- Research Help Desk (open days and early evenings)
- Writing Center (available by appointment and on a walk in basis as late as 9pm)
- International Programs Office
- Learning Resource Center/Office of Undergraduate Research and Studies (not located in the Lower Level, but included as an LC partner)
- Digital Media Lab (3rd floor)

The Problem

We recognize that the multitude of service points on the lower level creates confusion for patrons. Despite signage, it remains unclear to users who can support technology needs, research needs, and assist with access. We recommend reducing the number of service points as much as possible to reduce confusion and to improve inefficient staff models.

The Solution

Combine library service points now located in the LC into one co-located service desk. Plan to set-up this new desk by Spring, 2016, as a pilot project. Suggest placing it in the carpeted area by the Courtyard, at the bottom of the east stairway. Some or all of the IT computers presently located in that area will have to be redistributed elsewhere in the LC. There are numerous different scenarios for who should partner together at the new co-located service desk. The idea is to experiment. Changes will be incremental; a task force has been created to define the who/what/how of this desk will occur. Proposed services to co-locate:

- LC/Tech Support
  - Computer Classrooms
  - User Services
- Reference/Research Support
- Access Services
  - Circulation/Reserves
  - Interlibrary Loan (ILL)
**Mid-term (within the next 18 months/Phase 2):**

1. Build a larger research consultation space (bookable by staff for both in-person and online consults, i.e. using Google Hangouts or Skype or Fuze). Presently, there is only one consultation office available for use by 15+ subject librarians who wish to meet with their clientele individually for research consultations within the Learning Commons.

   Additionally, staff in Research & Liaison Services department (the unit that manages the current Ask a Librarian Research Help Desk) are interested in making closer connections with Writing Center staff with the end-goal of simplifying and strengthening the referral process between these two services.

   Placing the expanded research consultation center in close proximity to Writing Center is essential. Over time, staff from both offices will benefit from increased associations with each other, and ultimately students will be the real beneficiaries.

2. Change the footprint of the existing Reference print collection. This collection has been regularly weeded and is but a small remnant of what it used to be. The present collection is filled with current and relevant subject encyclopedias, dictionaries, style guides, manuals, and atlases that remain helpful to library users needing quick or brief information. It is still shelved in old “stacks” shelving (floor-to-ceiling) and is not attractively displayed.

   Remove all of the “stacks” shelving and use the alcoves on the east side of the LC to shelve part of the collection. Purchase new, attractive, low shelving that doesn’t block visibility for other sections. Investigate built-in shelves to add to walls of research consultation area or new co-located service point. These print volumes should be conveniently located adjacent to where research librarians will meet with their clientele.

**Long-term (two or more years out/Phase 3):**

- Move library staff offices that are presently on the Lower Level up in the tower (16 and 19 were mentioned as possibilities, from the Library Master Plan document of 2010).

   Freeing up space used up by so many staff offices will open up wonderful possibilities for adding new user services to the Lower Level LC, and return the flow of traffic in the LC back to how it was before the offices on the west side were added - one will again be able to circumnavigate the courtyard.

   This will also allow more natural light into the LC area, which was a desire expressed by students in the Applied Anthropology class research reports.

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1 See Fig 1.1 in Appendix A for example shelving (commissioned build)
• Move the Digital Media Lab down to Lower Level. Placing the DML on the Lower Level leads to building a MakerSpace, possibly to include a technology sandbox. This will reduce duplication of technology help service points, and help with seasonal changes in staffing needs.

In anticipation of the full implementation of this project, below is a projected floorplan, with suggestions regarding placement of recommended services, furniture, and staffing:
COMMITTEE CHARGE

The UMass Amherst Learning Commons (LC) brings together library, technology, and other academic support services in an environment that fosters informal, collaborative, creative work and social interaction amongst students and members of the Commonwealth. Opening its doors in 2005, the UMass Amherst LC has maintained a strong presence on campus and has received national and international recognition initially as a ground-breaking space that supports student learning and success. While still receiving interest from educators around the world, the space is approaching its 10th anniversary. The LC services, space and equipment need to not only be updated and reinvented to meet the needs of a constantly changing academic landscape.

The Learning Commons Assessment Task Force (LCAT) will provide recommendations to the Provost’s Learning Commons Committee (PLCC) on facilities, service and technology updates required for the reinvigoration of the LC space. With PLCC approval, the Learning Commons Assessment Task Force will be charged to:

- Conduct focus groups with students, faculty and relevant LC staff
- Survey students and faculty based on focus group results
- Review the results of several ethnographic studies conducted by University Libraries and academic departments.
- Review any UMass Amherst Libraries, IT, TEFD reports or surveys that include student and faculty feedback regarding LC or classroom needs and/or desires.
- Conduct site visits to selective libraries and organizations, nationally and potentially internationally, supporting their constituents in creative formal and informal learning spaces.
- Develop and outline recommendations for the design, creation and implementation of a reconfigured Learning Commons designed to meet the needs of the 21st century learner. Recommendations should cover facilities, staffing, services, policies, and management of such a space.
- Provide scenarios, steps, and timeline for implementing the recommendations using a phased approach with the goal of beginning the re-imagining and reconfiguration of the Learning Commons in fall 2014 (date of construction subject to change, based on variability of available resources/timing). The scenarios should allow for piloting different spaces and equipment in the LC and other library spaces.
- Present short-term recommendations to PLCC by May 15 2014
- Present long-term recommendations to PLCC by Sep 30 2015

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**MEMBERSHIP**

<table>
<thead>
<tr>
<th>Position</th>
<th>Name</th>
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<tbody>
<tr>
<td>Assistant Director for Administrative Services: Libraries</td>
<td>Terry Warner</td>
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<tr>
<td>Associate Director, University Libraries</td>
<td>Leslie Button</td>
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<tr>
<td>Learning Commons Coordinator</td>
<td>Carol Will</td>
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<td>Digital Media Lab Coordinator</td>
<td>Jeanne Antill</td>
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<td>Head, Systems and Web Management: Libraries</td>
<td>MJ Canavan</td>
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<td>Sarah Hutton</td>
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<td>Kevin Skelly</td>
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<td>Director of Educational Technology, TEFD</td>
<td>Kem Saichaie 2014, Glenn Caffery 2015</td>
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<td>[Student Representative] Writing Center, Undergraduate student</td>
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<td>[Faculty Representative] Lecturer, Innovative Instruction Fellows Coordinator, College of Education.</td>
<td>Kate Hudson</td>
</tr>
<tr>
<td>[Student Representative] Graduate student, Math Science, Learning Technologies College of Education.</td>
<td>Brad Wheeler</td>
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Approved by Provost’s Learning Commons Committee (PLCC) Jan 01 2014
PROJECT HISTORICAL OVERVIEW

Academic libraries have always strived to “serve the information needs of the higher education community and to improve learning, teaching, and research” (Association of College and Research Libraries, “About,” n.d., para 1). This ongoing service depends on the existing culture and practice of the academic community and is very closely tied to the landscape of the publishing and higher education industries, and therefore has an impact on the transition of physical spaces for student learning opportunities. Given the ever-accelerating shift of library materials from print to digital, spaces previously used to house printed materials are becoming freed up and open for new possibilities.

Over the past fifteen years, academic libraries have been constructing new or renovating old spaces into a commons, an ‘information commons’, or ‘learning commons’ model. These spaces, converging access to library collections, student support services and technology, are constructed with the intent to transform the traditional library setting into thriving learning communities. The learning commons as a space has evolved from a combined library and computer lab into a full-service learning, support, research, and project space for the undergraduate student population.

The EDUCAUSE report Learning Commons to Learning Outcomes outlines a boom in the learning commons model, with almost 200 instances cropping up in academic libraries worldwide since 1997 (Beagle, 2011). The increasing instances of this model speak clearly to its popularity however the question remains - is the learning commons successfully supporting undergraduate student learning? While Lippincott states that these “renovated facilities have become enormously successful, if gate count statistics are used as a measure,” there remains her following concern of “how do we engage them [the students]?” and the rationale that when “properly designed, implemented, and operated, it [the learning commons] will enhance student learning and scholarship” (Oblinger, pp 89 2006).

The work of the Learning Commons Assessment Task Force is to address this issue, by specifically answering the following questions:

1. **How do students use the space, services, and technology in the Learning Commons?**
2. **How are undergraduate students motivated or discouraged from using the Learning Commons?**

In order to answer these questions, the Task Force crafted a rich description of undergraduate student learning taking place in the UMass Amherst Learning Commons, to provide evidence-based recommendations for the renovation and renewal of the space, services and programs offered there within. This was accomplished through a systematic assessment approach of a sequential case study model starting with ethnographic research, which guides the group in establishing subsequent evaluation methods such as focus groups, surveys, and interviews – all outlined within this report.
METHODOLOGY AND KEY FINDINGS

To provide a holistic evaluation of the Learning Commons, including space, services and technology, several methods were undertaken. A conceptual framework, based on the categories of student learning outcomes presented by the Collegiate Learning Assessment (CLA) organization, was created to provide the groundwork for our project’s methodological scaffolding:

Of the suggested methods, the following were undertaken: focus groups, participatory observation, walking interviews, photovoice, in-depth interviews, and informal surveys. In addition to these methods crafted specifically by and for the LCATF, additional data collected from ongoing quantitative methods were incorporated into the discussion of our qualitative data analysis. Below are a few key findings and identified themes from our assessment; the qualitative data gathered as a part of our partnership with Anthropology is in the Anthropology Partnerships section of the report on page 17.
FOCUS GROUPS

Methodology

The following summary details findings gathered during focus groups conducted at the Isenberg School of Management and W.E. B. Du Bois 4th Floor Conference Room at UMass Amherst in late November, early December 2014. Ten (10) focus groups were held; each group consisted of either current students (undergrad or graduate) or current faculty at UMass Amherst. The groups were comprised as follows:

- Faculty (13 total individuals) – 6 Women / 7 Men
- Graduate and PhD students (11 total individuals) – 6 Women / 5 Men
- Juniors and Seniors (10 total individuals) – 6 Women / 4 Men
- *Freshmen and Sophomores (13 total individuals) – 6 Women / 7 Men

* The initial plan was for this group to be comprised of only incoming Freshmen (new to campus), but recruiting at these levels proved to be a challenge.

Each focus group lasted approximately 60 minutes; students and faculty represented a diverse mix of colleges. The general atmosphere was open and energetic. Participants were engaged and talkative. Each group provided substantial input, and individual participants were forthcoming with comments regardless of their department or major.

Participants were recruited using a variety of methods due to the difficulties associated with participation/sign-up. Recruitment included a questionnaire at the Learning Commons Technical Support Desk, email from the director of the Library to faculty and graduate students and random intercept/opt-ins of students visiting the library on the day of focus groups. Participants were offered a free coffee/drink at the Procrastination Station, snacks and a meal as incentive to participate.

Quoted directly from the Learning Commons Evaluation for the W.E. B. Du Bois Library at UMass Amherst - Focus Group Report, McCormack Center for Sport Research and Education, p. 3.

Key Findings

Group Spaces

**Faculty:** Except for occasional workshops with the Library, faculty members expressed little use of the Learning Commons for interaction with their students.

**Graduate Students:** Generally, graduate students seek quieter spaces than the Learning Commons to do their work. When they do need one of the group study rooms in the LC, they are frustrated by the lack of a reservation system and the fact that single individuals often occupy a study room. They were positively impressed with the furniture, white board and general arrangement of the Microclimates.

**Juniors/Seniors:** As students reach this stage, they have discovered departmental spaces that they then prefer to the Learning Commons. Nevertheless, these students expressed a greater need for group spaces but echoed the graduate students’ frustration over the lack of a reservation system for the study rooms. On a positive note, they, too, were drawn to the Microclimates and appreciated comfortable furniture and the social aspect it afforded. They
would like to see this type of flexible group spaces expanded in the LC. This despite complaints of noise in the LC.

**Sophomores/Freshman:** This group constitutes the heaviest user group in the Learning Commons with many noting that they visit the LC daily. Most cited group work as the primary reason for going to the library. Similar to juniors/seniors, the freshmen/sophomores love the new Microclimates eclectic seating area and would like to see more. They seem less bothered by the noise than the other groups.

**Technology**

**Graduate Students:** In contrast to undergraduates, the majority of graduate students bring laptops to the library. Their primary complaint was the “spottiness” of the wireless connectivity. When using Learning Commons computers (Macs preferred), there were mixed reviews on the software available: SPSS was the most popular application but they were apparently not finding every application they needed, although they could not identify those missing applications. They were also somewhat critical of IT support for printing and scanning in the LC.

**Juniors/Seniors:** They seek out the Learning Commons for computers, software, scanning and printing, as the majority does not bring laptops along. They also appreciate the resources the library offers such as the laptop checkout program as well as printing and scanning but were frustrated that some students occupy a computer station but do not use the installed computer. The juniors/seniors preferred Macs but complained about the service, as the Macs often had to be rebooted. In general, there were complaints about service at the LC desk and the speed at which technology was repaired. As heavier users of the library’s databases, this group requested more online resources and more assistance in finding those currently available.

**Freshman/Sophomores:** Many of their responses echoed those of the Juniors/Seniors: They prefer Macs, are generally satisfied with printing but think that the quick print stations should be advertised. They would like more study tables and more power and charging stations.

**Services**

**Faculty:** While faculty members appreciate the Writing Center and peer-to-peer tutoring, some felt their departmental resources were more appropriate for their students’ use. Those who weren’t aware of library service offerings would prefer to have a librarian come to the department to present rather than receiving email announcements of services.

**Graduate Students:** They generally report that they consider services for their students first rather than their own uses in the library and may ask librarians to visit their classes. Their primary concern is that their students learn how to conduct research.

**Juniors/Seniors:** Despite their time on campus, this group was still fairly unaware of library services and expressed the preference to “figure things out on their own.” Exceptions seem to be Ask a Librarian, the Writing Center, and peer-to-peer tutoring.

**Freshmen/Sophomores:** This group seemed more aware of services but seemed hesitant to use them. Nevertheless, they also praised the Writing Center and peer-to-peer tutoring.
Recommendations

Communication of Services

The Writing Center, Peer-to-Peer Tutoring and Ask a Librarian are very popular services, but awareness of other services, such as the Digital Media Lab, Team-Based Learning Classroom, is low and thus, underutilized. All groups were excited about the various services despite low awareness and expressed if they knew more, they may utilize the services. Email is not the way to communicate library services, in-person communication is recommended by the library within departments and classrooms.

More Microclimates (please)

Every group noted how much they liked and enjoyed the Microclimate set-up in the Learning Commons and wanted more, much more! The Microclimate is an atmosphere that would be advantageous across all constituencies. And the Microclimate should not be limited to the Learning Commons – incorporating them on various floors was suggested.

Reservations

While the perception of many graduate and undergraduate students is that the group spaces often have one individual occupant, quantitative data suggests otherwise. A reservation system is recommended and could potentially lead to higher usage.

Quoted in part from the Learning Commons Evaluation for the W.E. B. Du Bois Library at UMass Amherst - Focus Group Report, McCormack Center for Sport Research and Education.

PRIOR AND ONGOING RESEARCH

LibQual Survey

The Libraries have used the Association of Research Libraries’ LibQUAL survey multiple times to better understand users’ perceptions of service quality. The most recent survey was in 2015, and 385 undergraduate students responded. There are several findings relevant to the Learning Commons transformation. More information about 2015 LibQUAL survey results, including details about methodology, can be reviewed at: www.library.umass.edu/assets/Assessment/2015-LibQual-Report.pdf.

Undergraduates prioritized the environment and feeling of the library as a comfortable, quiet, getaway space that would allow them to do work as individuals (group work space was also desired, but ranked lower). Undergraduate students most desired (in descending order):

- A quiet space for individual activities
- A getaway for study, learning, or research
- Dependability in handling users’ service problems
- A comfortable and inviting location
• Modern equipment that lets me easily access needed information

Undergraduate students’ desired and perceived levels of service most closely aligned with statements in an “Affect of Service” category (from most to least aligned):

• Willingness to help users
• Giving users individual attention
• Readiness to respond to users’ questions
• Employees who instill confidence in users
• Employees who deal with users in a caring fashion

The largest gaps between undergraduate students’ desired and perceived levels of service are (in descending order):

• A library space that inspires study and learning
• A comfortable and inviting location
• Modern equipment that lets [them] easily access needed information
• Quiet space for individual activities
• Dependability in handling users’ service problems

Areas to address in the LCATF transformation include a quiet space for individual activities, addressing dependability issues in handling users’ service problems, building a comfortable and inviting space, and providing modern equipment that lets users easily access needed information. These were the most desired services on which we are currently falling short, according to undergraduate perception.

LIBRARIES TASK FORCE REPORTS

Libraries Task Force Reports

Over the past couple years, the Libraries have formed several task forces that have focused on reviewing and making recommendations about the future direction of our departments. Recommendations that pertain to a LC transformation are summarized below.

Research and Liaison Services Task Force

The RLSTF recommends exploring a closer connection to the Writing Center (located in the LC), and echoing their model for consultative services by appointment. A research consultation center would need to be developed; currently, there is only one space for this purpose in the LC. A co-location of service points is also recommended to free up space, reduce user confusion, and encourage closer work between service point staff.

Access Services Workflow Review Task Force

Many ASWRTF recommendations center on creating a co-located or single service point in the LC, and necessary supports for this change such as standards for a common knowledge

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2 See Appendix B
3 See Appendix B
set for all service desk staff, software to support the service point’s communication and functionality, and library-wide customer service training.

*Digital Strategies Group Strategic Plan Implementation Task Force*  

The DSGSPITF (a.k.a. Delta Force) mostly centers around recommendations related to the creation and management of unique digital content, but the group includes a recommends the development of a formal marketing plan that promotes library services, acknowledging that for many services, we use a “service desk model” where we wait for users to approach us instead of pushing out information about the library.

*Marketing Work Group*  

The MWG recommends the adoption of a coordinated marketing orientation across the Libraries, which involves focusing on our user needs instead of products. They also recommend the development of personas (fictitious characters that represent different user groups) to better understand user needs and to tailor services and messages to these groups.

**ANTHROPOLOGY PARTNERSHIP**

According to Asher and Gibbons (2014), ethnographic research is increasingly being utilized by academic libraries to provide “rich descriptions of students’ experiences and different groups’ understandings of each other’s’ roles” in the library, by using methods of “semi-structured interviews, photo elicitation, participant observation, mapping exercises, and web and space design workshops” (para 2). This method of data gathering not only provides new insights for the academic library into student behavior in the learning commons, but also provides a participatory visual data collection method for studying environments for students, encouraging involvement and therefore learning (Gubrium & Harper, 2013; Strange & Banning, 2001). In order to construct an informed ethnographic research project in the UMass Amherst learning commons, a partnership with the Anthropology Department has been established.

**Anthropology Collaborations to date**

**Fall 2012**

ANTHRO 397EM: Ethnographic Field Methods (Undergraduate Course)

Instructor: Arthur Keene

Students Enrolled: 8 “novice” anthropologists, including sophomores, juniors and seniors

“Students will learn about ethnography as a way of knowing a community.”

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4 See Appendix B  
5 See Appendix B
Reported Findings

- Students queried with the question, “How do you define success at UMass” had a hard time defining this concept.

- Students surveyed viewed library as valued most for:
  - Central location
  - Comfortable communal spaces
  - Availability of technology
  - Food services

- Non-study activities were observed, however students and student observers regarded the LC as a space in which to be highly productive.

- Library staff were practically invisible to students; students are not often “pro-active” in addressing minor concerns within the library; students display “passivity”, yet they want library staff to be more interactive in enforcing the rules.

- Personal space: LC is very social yet students go there to “be alone together”. Students will arrange furniture to provide a sense of privacy/individual space. Group study rooms often occupied by singletons. Keene stressed to concept of students being “alone together” as an important aspect of students’ motivation.

Associated Documents

- Report from Dr. Keene (Add to Appendix)
- Course syllabus

Comments

*Before advent of Microclimates; our first efforts at trying to find out about student attitudes and behavior in the LC.*

Spring 2014

ANTHRO 394AR: Applied Anthropological Research (Undergraduate Course w/ TAs)

Instructor: Krista Harper

Students Enrolled:
10 undergraduates,
2 Anthropology TAs
*Liz Usherwood and Evan Taylor*

*Researching students in the LC (with UMass LC as client) as well as how students use information resources at home and on campus.*

Applied Methodologies

- Cognitive maps
- Participatory observation
- Walking Interviews
- Photovoice focus groups
- Collaborative research via Google Drive
- Qualitative data analysis using Dedoose
Reported Findings

- Students choose library space according to task at hand
- Need quiet to do serious work – students wearing headphones in areas designed for group work
- Quick work/printing
- Lighting
- Students more comfortable asking student workers for help (rather than library staff)
- Issues about using social media when it’s crowded
- Playtime ex: throwing paper balls over glass study room walls
- Who gets dibs on the glass study rooms, singles or groups?
- Need more table surface to spread out
- Students don’t want to be ones to evict a singleton (we updated the signage so students know where to get help)
- Love whiteboards
- Comfy furniture is still desirable but not necessarily for hard work
- Themes: want to be alone but also need collaborative space; alone together
- Lines for space are a barrier
- Rows of computers with small table surface are not desirable
- OUTLETS, OUTLETS, OUTLETS
- Surprise conclusion by one student: "I was surprised to find that students and users seem to prefer independent study as opposed to the group study atmosphere the Learning Commons promotes.” (Zachary Hall & Ruthy Lewis)

Documents

- Syllabus
- Presentations
- All documents on google drive

Comments

Carol and Sarah worked very closely with Dr. Harper; they even participated in coding some of the data in Dedoose and contributed to a paper, Participatory Design Ethnography in the Learning Commons.

The project goal was to train students in ethnography while informing library policy. The Abstract of this paper was presented at the 75th Anniversary Conference, Continuity and Change, of the Society for Applied Anthropology (SfAA).
**Fall 2014**

ANTHRO 775: Anthropological Research Methods/Qualitative Research Methods for Public Policy and Administration (Graduate)

Instructor: Krista Harper

Students Enrolled: 8 graduate students from Anthropology and other departments

Applied Methodologies

- Client-based qualitative research project; assessing how digital natives use Learning Commons spaces
- Participant observation
- Interviews
- Undergraduate walking interview
- Librarian interview
- Data inventory

Syllabus: [https://drive.google.com/drive/search?q=anthro%20775%20syllabus](https://drive.google.com/drive/search?q=anthro%20775%20syllabus)

**Reported Findings**

- Observations on use of Microclimates by people of color
- Students make own meaning, construct study “habitat”
- “Microclimates space as “perspectival” (depends on each student)
- Impulse towards privacy

- Findings about preferences for furniture such as built-in privacy features (egg chairs) and easily portable furniture
- Naturalization of lighting
- A proliferation of Microclimates!
- Lack of awareness of services offered by Librarians “librarian invisibility”
- Anxiety and ambivalence re: asking librarians for help
- They think it’s easier to do research on their own.
- Lack of awareness of research tools

**Documents**

- Syllabus
- Presentations on google docs
- Video of presentations

**Comments**

*Graduate students introduced the idea of racial diversity in the Learning Commons and how awareness of the space design could impact the feeling of inclusiveness or not.*
Spring 2015

ANTHRO 394 (Undergraduate)
Instructor: Dr. Amanda Walker Johnson
Students Enrolled: 8 undergrads

Applied Methodologies
- Field Observations
- Maps
- Walking interviews
- Surveys
- Archival research
- Material Culture
- Focus groups
- Photovoice
- Mixed methods
- One on one interviews

Reported Findings
- Students need table space; room to work and spread out; own space
- Students like to feel “relaxed” and comfortable; beverage is a must
- Safety - more than physical safety (although women are concerned about this); concerns of inclusiveness/diversity, cultural
- LC (South End) perceived as “white” space?
- Microclimates seen as attracting more racial diversity
- Need staff with people skills
- “privacy in public”, “common space to do alone work”, Privacy in public”
- More egg chairs
- Group work
- Need quiet
- High comfort seating vs. low comfort
- More portable surfaces desired
- Love the “cubicles” (glass study rooms)
- Lack of support for technology in Microclimates
- “Aesthetic matters”
- “More microclimates”

Documents
- Shared by Dr. Walker Johnson, via Dropbox

Comments
The idea that the LC could be perceived as “white” space and the concept of "alone together"
Fall 2015 in progress

ANTHRO 775/PubP&A 636: Anthropological Research Methods/Qualitative Research Methods for Public Policy and Administration
Instructor: Krista Harper
Students Enrolled:
Graduate students
• Photovoice
• Focus groups
• Interviews

Spring 2016 projected

ANTHRO 394AR: Applied Anthropological Research
Instructor: Krista Harper
Students Enrolled:
TBD
• TBD

ENVIRONMENTAL SCAN

The Services Working Group used several criteria to determine peer libraries for an environmental scan:

1. Predefined list of UMass peer institution libraries
2. Institutions identified by Joan Lippincott in conversations regarding new or redesigned learning commons across the country
3. Web searches and incidental discussions identifying new and interesting approaches to Learning Commons designs

A list of highlights from LCs of selected schools identified follows:

Indiana University Bloomington https://libraries.indiana.edu/learningcommons
The Herman B Wells Library has a Learning Commons geared towards student work and a Scholars Commons designed for faculty and graduate students. Services in the Learning Commons include technology consultation, hardware/software support, research consultations, and peer mentors. Peer mentors are part of an exploratory scholarship program, and are highly trained in registration, degree-mapping software, and the student success system. Research consultants are students who take a day-long training session and meet regularly. Student workers are consciously placed in front-line positions so that the student body feels more comfortable seeking help.

University of Iowa http://www.lib.uiowa.edu/commons/
The LC at the University of Iowa features a robust programming schedule that includes express workshops (30 minute sessions on academic topics) such as Study Snacks 101,
Printing Wirelessly, Taking Notes Comic Book Style, Establishing Relationships with Instructors, Budgeting your Financial Aid, How to Build a Website, and more. A “Badges at the Libraries” program helps students to track achievements while learning about the libraries. Student work is showcased in a variety of formats; for example, classes commonly will hold class presentations in the LC. Students can check out laptops and other hardware such as laptop charges and presentation devices.

**Virginia Tech**

The Learning Commons at Virginia Tech is based in a Learning Services division that covers core instruction courses, learning environments, public programming, community engagement, and online learning. A successful service has been self-service skill-based tutorials that have been embedded in places like catalog dead ends and on LibGuides. A Research and Informatics division works with more complex research problems. Equipment such as drones and laptops is circulated. The reference desk is staffed by graduate students from all disciplines that go through an extensive training. The LC includes a Writing Center and Communication Lab.

**SITE VISITS**

LCATF members organized two site visits during Spring 2015. The University of Pennsylvania in Philadelphia, PA’s Weigle Information Commons is about 10 years old and is widely recognized for its integrated services. Two Task Force members spent a full day speaking with numerous staff and touring their spaces. Williams College in Williamstown, MA recently built the state of the art Sawyer Library, and the group spent a half-day touring the space and learning about associated services with the Director of Libraries.

**UPenn Weigle Information Commons**

The Weigle Information Commons (WIC) has an incredibly robust suite of services through its active program partners. Program partners have met every month since 2007 for a topical discussion and updates about their departments. Partners are free to host their own events or programs, or they can partner with the library. The program partners offer workshops on topics such as an introduction to 3D printing, presentation software, tools such as mind mapping, Excel, citation management software, and Google Scholar. All workshops are included on a central calendar. A workshop calendar is sent to program partners who can advertise on their lists, and a weekly calendar is sent to a listserv. Workshops are branded across campus as “WICshops”.

In addition to the workshops, students can seek out individual help by drop-in or by making an appointment with a subject expert through LibCal. The WIC hosts seven Digital Literacy Fellows each year who are unfamiliar with technology in graphic design, web resources, file management, etc. The program focuses on building technology skills through hands-on workshops.

There are numerous group and individual study spaces, and students can reserve rooms through LibCal. More detail about spaces is included with the images below.

The WIC hosts numerous events such as research exhibits, research lightning talks, faculty active learning showcases, meditation sessions, and others. Contests (with cash prizes) are hosted by WIC which encourage the UPenn community to make use of WIC resources.
Recent contests include a “What does healthy look like?” video contest, a comic book production contest, a poster to describe learning contest, and an open access promotion video contest.

A conference room often used for classes, workshops, and student and staff meetings. It is equipped for videoconferencing.  
https://www.flickr.com/photos/pennwic/14466595442/

Lounge furniture in the Education Commons.  
https://www.flickr.com/photos/pennwic/16043385561/

A collaborative classroom  
https://www.flickr.com/photos/pennwic/14281346468/

Williams College Sawyer Library

The tour focused on the brand-new, state of the art space with some discussion of services. There are numerous styles of group and individual workspaces throughout the library, as well as large flexible spaces for public events. The Library uses the furniture and space as a way to regulate noise in the building. The Sawyer library has three main service points: circulation, reference, and technology. It was reported that circulation traffic has decreased over the last five years, reference traffic is stagnant, and technology traffic is increasing. Based on feedback received in the first year, the Sawyer library would like to move to a single service point. The organization reorganized prior to moving into the building, a move that the Director recommended.
The library hosts a number of programs, such as a peer writing program, though research workshops are not commonly offered due to low past attendance. Non-library groups such as the art museum and Center for Theatre and Dance frequently host performances or exhibits in the library.

Booths include power and are built for individual work on a tatami mat or group work
[Link](https://www.flickr.com/photos/wcl/15198874031/in/album-72157623125969805/)

Short frosted glass walls offer privacy without obstructing line of sight
[Link](https://www.flickr.com/photos/wcl/15201911845/in/album-72157623125969805/)

Carrels were designed to fit in window spaces with a minimal footprint. Carrels were reported to be very popular among students
[Link](https://www.flickr.com/photos/wcl/15178896546/in/album-72157623125969805/)

A variety of lounge furniture is distributed throughout the building, with adjustable study stands. Most study space has a window view. Furniture can be cleared and students can sit on the cushioned tiered seating for a presentation
[Link](https://www.flickr.com/photos/wcl/14728196085/in/album-72157623125969805/)
The Reference Desk has a long and slim footprint and includes several desktops; patron and staff members have the option of standing or sitting
https://www.flickr.com/photos/wcl/14725013911/in/album-72157623125969805/

This lounge study space includes numerous outlets and portable furniture, making it an ideal event or performance space
https://www.flickr.com/photos/williamscollege/15147631388/in/alb um-72157647545072868/

Staff report that students like the powered tables with frosted privacy glass
https://www.flickr.com/photos/williamscollege/15147440599/in/albu m-72157647545072868/

Small powered individual booths are also popular among students.
https://www.flickr.com/photos/wcl/15351581807/in/album-72157623125969805/

Takeaways from Site Visits

We were the very impressed with the high-functioning suite of services and programming that the Weigle Information Commons offers that could be echoed at UMass.

- Program partners meet once a month for a topical discussion and departmental updates.
- Program partners coordinate workshops and advertise them on the same platform.
- The WIC showcases student work through research exhibits and lightning talks, and sparks student creative work through contests that use the WIC’s resources.
- Digital Literacy Fellows are undergraduate students who develop their technology skills over the course of a year.
While the Sawyer Library building is brand new and was designed for an elite small liberal arts college, there is much that is applicable to our project at UMass.

- A variety of small divided spaces for individual study, allowing to study alone, but together (and more space efficient than individuals using group study rooms).
- Frosted glass walls that offer privacy with light and without obstructing the line of sight.
- A variety of lounge furniture accompanied by adjustable study stands.

**MICROCLIMATES**

Below are images of the floorplan of the Microclimates, and the space as being used following implementation, respectively.
Background

The concept of building Microclimates arose out of visits to the Young Family Digital Library in Calgary as well as to the Hunt Library at North Carolina State University where several of us attended the Designing Libraries for the 21st Century Conference. The object was to build three different but adjacent designed spaces (microclimates) in order to serve as a test space/sandbox and to study student response to the spaces. Assessment of these pilot spaces would inform the committee as to ideas for a future Learning Commons. The creation of a scaled down experimental space allowed us to take risks without impacting the rest of the Learning Commons and on a much smaller budget.

Methodology

The Learning Commons Assessment Task Force Microclimate Proposal clearly outlines steps we took to create the Microclimates space. (See appendix Learning Commons Assessment Task Force Microclimate Proposal https://docs.google.com/document/d/1AYSykz5iXEjAy7lg-nf-pGPFEhQ8KlWvi6uvuWCQrvI/edit#)

A microclimates subcommittee was formed whose task was to select a variety of furniture to populate three adjacent microclimates, each with a difference space purpose/intent. (See Staff Observation of Microclimates - Assessment at https://docs.google.com/a/umass.edu/document/d/1fWgz0QnXTWP8efdj6yNjNF0wFnysJOZ_Z_N5f6HBfk-I/edit?usp=sharing) Furniture was chosen with the idea of trying out several different kinds of chairs to assess for use, comfort, and durability.

The basic building block of the Microclimates space is the furniture. A variety of furniture was deployed in an effort to discover both preference and purpose of use by students. A document of the furniture was designed as a means to record observations on the use of
the furniture. The main considerations for furniture were durability and ease of maintenance, comfort, popularity, and flexibility.

Spaces

1. Collaborative working groups
2. Team-based learning-style group work
3. Exploration of alternative comfortable seating options

Timeline for installation

Removal of north end glass study rooms and subsequent installation of Microclimates furniture and associated technology hardware began in August 2014 and throughout the Fall 2014 semester up until January 2015.

The ethnographic research data as provided by collaborating with the Anthropology Department was crucial to discovering student need and preferences as related to the Microclimates. Other means of gaining insight into student attitudes added to our findings.

- Assessment methods:
  - Observation by staff and committee members (rating chart)
  - Whiteboard surveys provided informal random feedback (See appendix for photos). Whiteboards were deployed with markers and questions to attract feedback. (see images)
  - Feedback box was placed in the Microclimates for feedback. Feedback was reviewed regularly (see comprehensive list of comments)
  - Head counts were performed in the Learning Commons and Microclimates regularly.

Key Findings

Furniture:
- Egg chairs are extremely popular and support the idea of “alone together” by providing sound dampening yet a way to be a part of the crowd
- Furniture is constantly re-arranged by students and so should be movable (daily original set-point is needed in order to restrain chaos)
- Furniture should be stain resistant, sturdy and cleanable
- Some permanently installed larger pieces serve to anchor Microclimates (purpose of spaces)
- Whiteboards are popular and used often; the flexibility allows for them to be moved and combined together

Practical considerations

- More electrical outlets!
- Adaptors for Macs

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6 See Appendix A for furniture rating chart
Services/support

- Early indications are that students need ongoing support to help utilize the provided technology in the Microclimates (note: further study of technology use is needed)

General

- Sense of belonging yet safety of “alone together”
- Color is desirable
- Space attracts diversity? (Harper student presentation)
- Microclimates positively welcomed in general
- Importance of alternative spaces for people not inclined to use the Microclimates

Microclimate Technologies

Blue couch with Steelcase dual screen system

The Steelcase system allows for users to connect to either each monitor individually or to both monitors from the same input. The system has on-screen instructions at startup. Connectors are provided for VGA (2x), HDMI and Apple Thunderbolt/Mini display.

Next Steps:

Classrooms has yet to install the Polycom System that will allow for video conferencing on the unit.

LC Staff need to draft a policy for conferencing use

Apple TV with projector and screen

With the installation of the Extron wall unit, most controls for the projector and the Apple TV can be managed by the clearly labeled buttons on the Extron box.

Next Steps:

Classrooms needs to draft an instruction sheet

LC Staff need to draft a policy for use and for managing sound

Wall screen with Mac Mini (Green horseshoe-shaped booth)

The Mac mini is dual boot and has both the Classrooms Windows and Mac images users find in the Learning Commons.

Next Steps:

Classrooms needs to provide instructions for use and simplify start up

LC Staff need to draft a sign-out policy for wireless keyboard and mouse

Monitors on adjustable arms
Several tables (round table, green “luncheonette”) are equipped with monitor arms and computer screens to provide students with more screen real estate for their laptops and mobile devices. Connectivity is limited to VGA that may in part account for limited use. Mac users would need an adapter.

**Next Steps:**

Classrooms needs to spread the monitors around to more tables LC Staff may want to check out adapters for Macs.

**FINAL RECOMMENDATIONS**

This section refers to specific item in the committee’s charge:

*Make recommendations to SMG for ongoing support and sustainability*

Based on the literature reviews and field research findings of the LCATF, our group recommends the following; options are listed in order by preference and feasibility:

I. **Discussion of findings (including all methods used)**

1. For staff views of services: LCATF met with two groups from the library who are undergoing departmental services review:
   - Access Services Workflow Review Task Force
   - Research & Liaison Services Department Review Task Force

Both of these groups staff a service point within the LC. Both groups have been tasked to consider new ways to offer/promote the services, to look for new efficiencies, to reduce duplication of services, to consider potential co-locations of services into one physical space.

*Final or draft reports from the two groups will be included in the appendix*

2. For users’ views of services:

   - Krista Harper (Fall, 2014) / Amanda Johnson (Spring, 2015) Applied Anthropology Research courses as related to Ethnographic Research of Libraries Spaces and the Student Who Use Them. Students presented their findings from a semester worth of using such methods as focus groups, surveys, observation, and others to determine student behavior and attitudes about the Learning Commons, with a focus on the microclimates
   - Focus groups conducted in Fall, 2014 “Learning Commons Focus Group Report”
3. What we learned:

- Names of service points currently in use may not be meaningful to students
- Signage often not noticed or visible
- Students are “do it yourselfers” and may not see a need to turn to any service point for help
- Staff groups are in favor of combining service points and learning new skills that will be required to make this successful
- Students work all hours, library needs to offer more services in late evening or overnight

II. Recommendations:

**Short term (Phase I):**

The Learning Commons is a collaboration of both internal and external partners. Current partners include:

- Learning Commons staff (available 24/5)
- Information Technology staff including User Services and Computer Classrooms, as well as the separate Assistive Technology Center (Desk staffed 24/5, Assistive Technologies open 24/5 but consulting & support services available by appointment
- Circulation Reserves (available 24/5)
- Research Help Desk (open days and early evenings)
- Writing Center (available on a walk in basis as late as 9pm)
- International Programs Office
- Learning Resource Center (not located in the Lower Level, but is included as an LC partner)
- Digital Media Lab (3rd floor)

We recognize that the multitude of service points on the lower level creates confusion for patrons. Despite signage, it remains unclear to users who can support technology needs, research needs, and assist with access. We recommend reducing the number of service points as much as possible to reduce confusion and to improve inefficient staff models.

**Suggest:**

- Combine library service points now located in the LC into one co-located service desk. Plan to set-up this new desk by Spring, 2016, as a pilot project. Suggest placing it in the carpeted area by the Courtyard, at the bottom of the east stairway. Some or all of the IT computers presently located in that area will have to be removed. There are numerous different scenarios for who should partner together at the new co-located service desk. The idea is to experiment. Changes will be incremental; a task force will be created to define the who/what/how of this desk will occur. Proposed services to co-locate:
• LC/Tech Support
  i. Computer Classrooms
  ii. User Services
• Reference/Research Support
• Access Services
  i. Circulation/Reserves
  ii. InterLibrary Loan

It is likely that by Spring, 2016, the research help representative will be a trained student (for part or all of the shift) who will answer questions that require minimal skills or experience and make referrals to either a subject specialist librarian or an on-call generalist librarian for more advanced questions.

• An increase in the number of referrals to research librarians will require additional consultation space. Prior to new space development, there must be a designated consultation space intended for temporary use.

**Mid-term (within the next 18 months/Phase II):**

• Build a larger research consultation space (bookable by staff for both in-person and online consults, i.e. using Google Hangouts or Skype or Fuze). Presently, there is only one consultation office available for use by 15+ subject librarians who wish to meet with their clientele individually for research consultations within the Learning Commons. Additionally, staff in Research & Liaison Services department (the unit that manages the current Ask a Librarian Research Help Desk) are interested in making closer connections with Writing Center staff with the end-goal of simplifying and strengthening the referral process between these two services. Placing the expanded research consultation center in proximity to Writing Center is essential. Over time, staff from both offices will benefit from increased associations with each other, and ultimately students will be the real beneficiaries.

• Change the footprint of the existing Reference print collection. This collection has been regularly weeded and is but a small remnant of what it used to be. The present collection is filled with current and relevant subject encyclopedias, dictionaries, style guides, manuals, and atlases that remain helpful to library users needing quick or brief information. It is still shelved in old “stacks” shelving (floor-to-ceiling) and is not attractively displayed. Remove all of the “stacks” shelving and use the alcoves on the east side of the LC to shelve part of the collection. Purchase new, attractive, low shelving that doesn’t block visibility for other sections. Plus, investigate built-in shelves to add to walls of research consultation area or new co-located service point. These print volumes should be conveniently located adjacent to where research librarians will meet with their clientele.

**Long-term (two or more years out/Phase III):**
- Move library staff offices that are presently on the Lower Level up in the tower (16 and 19 were mentioned as possibilities, from the Library Master Plan document of 2010). Freeing up space used up by so many staff offices will open up wonderful possibilities for adding new user services to the Lower Level LC, and return the flow of traffic in the LC back to how it was before the offices on the west side were added - one will again be able to circumnavigate the courtyard. This will also allow more natural light into the LC area, which was a desire expressed by students in the Applied Anthropology class research reports.

Examples of use of the reclaimed space:

- Set up a “printing corral” - put all Learning Commons print services together in one area and have a help desk nearby just for printing. Students really want simplified printing procedures, based on focus group comments (From comments at Applied Anthropology Research class presentations)

- Move the Digital Media Lab down to Lower Level. Placing the DML on the Lower Level leads to building a MakerSpace, possibly to include a technology sandbox. This will reduce duplication of technology help service points, and help with seasonal changes in staffing needs.
  - The DML move from the 3rd floor may free up space for a larger Graduate Student Lounge.

- Keep LRC on 10, their space needs too large to fit into Lower Level

- What about other campus and/or library services who may wish to have a presence in the LC? Develop an application process.

**ANNOTATED BIBLIOGRAPHY**


   Leading scholars discuss finance, federal and state governance, the influence and integration of the latest technologies, and major changes facing higher education in the 21st century.

This article reviews six case studies of the ‘commons model’ on different campuses. The results indicate model can only be evaluated by balancing the qualitative reviews of service effectiveness and quantitative measures of service delivery.


The author surveyed over 250 academic library directors on the topic of space planning. He advocates for the learning commons model built around social dimensions of learning and knowledge along with space planning


The author examines how much progress college students actually make toward widely accepted college goals of undergraduate education, drawing sobering conclusions about their lack of improvement in important areas such as writing, critical thinking, and qualitative skills.


The authors explore the shift from classroom spaces to learning spaces, focusing on services libraries and IT organizations must provide for these new spaces to succeed.


The authors share a case study from an ethnographic study at Loughborough University to evaluate the use of large open learning/social space in the library.

7Carpenter, Russell,,IGI Global,. (2013). Cases on higher education spaces innovation, collaboration, and technology.

The author highlights key innovations and collaborations in space design from across campuses and institutions in writing centers, libraries, digital media labs, learning commons, and more.
The authors report on user research and participatory design projects, making a case for using participatory design of academic libraries.

The authors conducted fieldwork in the design of informal learning spaces in libraries to understand how students learn or perceive these spaces.

The authors explore the transformation of library space to create new physical and virtual spaces to support changing needs of 21st century students and scholars.

The authors present and discuss ten strategies which are key to improving learning spaces.

The authors share the results of a case study to answer the question "how do students really conduct research for classroom assignments," which was conducted at five large Illinois universities.


This article is a case study of an urban academic library’s attempt to identify factors that influence the perceptions of students of color concerning the library as a welcoming space.


These proceeding papers explore new challenges and opportunities libraries face, including design challenges to ensure all users will be able to use digital libraries.

**Foster, N., & Gibbons, S. (2007).** In Foster N., Gibbons S. (Eds.), *Studying students: The undergraduate research project at the University of Rochester*. Chicago: Association of College and Research Libraries.

The authors describe the groundbreaking application of ethnographic tools and techniques to understanding undergraduate students and their use of information at the University of Rochester River Campus Libraries.


The authors discuss a multistage renovation project to transformation the academic milieu with the primary purpose of fostering a more learning-centered culture and the role of assessment in creating a learner-centered environment.


The authors share findings from a longitudinal, quantitative and qualitative study at Sheffield Hallam University which explored learners behaviors, attitudes and preferences toward informal learning spaces.

The authors demonstrate how informing space and program design with basic principles of human learning can shape student engagement with the library while better meeting institutional goals.


The authors share results from an empirical study to assess whether the academic library as place supports students’ desire to feel connected to higher education’s mission.


The authors describe the results of a longitudinal study of first-generation, low-income students and consider the impact of their participation in a multicultural learning community designed to combat isolation and marginalization they experience.


The authors present best practices for training millennial generation of reference works on virtual reference.


The authors explore many factors that can impact student success and includes many practical examples of programs, policies, and projects designed to increase success and retention of students.


The authors examine the pervasiveness of change and other challenges facing libraries.

The author describes policies, programs, and practices a diverse set of institutions have used to enhance student achievement.


The author identifies out-of-classroom learning and personal development identified from interviews with college seniors.


The author discusses reasons and drivers for academic libraries affecting university strategy with regards to shaping and developing learning spaces in response to changing pedagogical behaviors.


The author examines diversity initiatives at small academic libraries, particularly Oberlin College’s experience in addressing diversity in the workplace.


The authors present a conceptual framework of space design principles and conditions for learning in academic libraries.
30 Lippincott, J. K., & Greenwell, S. (2011). 7 things you should know about the modern learning commons. EDUCAUSE Learning Initiative (ELI) 7 Things You should Know, April 11, 10/02/13.

The authors provide a concise description and quick overview of the modern learning commons.

doi:10.1080/07294360.2010.512629

The authors explore the role of social learning spaces on the student experience as revealed through interviews with 103 students.


The author examines the need for a learning commons to provoke new learning and possibilities for transforming our way of thinking.


The authors describe a study of user preferences regarding reference and technical support services gleaned through a survey.


An interactive toolkit created to design, share, and promote an updated model for institutions to plan and support technology-rich informal learning spaces.

The author presents an ongoing exploration of the intersection of space, technology, and pedagogy to ensure learner success.


The authors present a high-level investigation of the physical-conceptual continuum occupied by both digital and physical libraries.


The authors discuss the utility of evaluating technology-rich learning spaces from a practitioner perspective.


The author addresses workplace culture in academic libraries as an aspect of organizational success in achieving on-the-job diversity.

39 Snavely, L.,. (2012). *Student engagement and the academic library*. Santa Barbara, California: Libraries Unlimited, an imprint of ABC-CLIO, LLC.

The author explores how initiatives that involve high impact educational practices and other creative programs can effectively engage undergraduate students with academic libraries.


The author provides practical advice on how to effectively create and re-create interiors of academic libraries for teaching, learning, and research.

The author contends that it is essential for academic librarians to identify and remain mindful of the unique needs of an increasingly diverse student demographic to ensure academic libraries are a welcoming place for all students.


This report illustrates how progressive academic libraries are evolving in response to the challenges brought on by the digital revolutions.


This study investigates the relationship between campus racial climate and how white students and students of color attending a Midwestern research, predominantly white institution perceived academic libraries on campus.
**APPENDIX A**

Fig 1.1

*Curved Work, combining shelving with seating solution*
October 14, 2014

At the Microclimates Assessment Working Group meeting of 10/14, it was decided to create a list of our observations of the Microclimate Area as it stands.

Please add your observations to the right column.

**Furniture**

**Space 1: Team-based learning classroom mock-up with VLC**

<table>
<thead>
<tr>
<th>Custom Designed For Steve Brewers' Classroom in Morrill - Round Table</th>
<th>6 monitors, power through the middle, outlets on table (not on legs), We would test out with 3 Sayl Chairs and 3 HAG Chairs.</th>
<th>Not able to evaluate until monitors placed-CW</th>
</tr>
</thead>
<tbody>
<tr>
<td>Herman Miller Sayl Chairs</td>
<td>Netted chairs, come in varied colors; adjustable</td>
<td>Very comfortable; quality material-CW Used very often, keeps posture straight and comfortable-JP</td>
</tr>
<tr>
<td>HAG Capisco Ergonomic Chair</td>
<td>Can flip around and use to rest against; adjustable; comes in different colors</td>
<td>These chairs are actually yellow and are already dirty. They are sturdy but for some, confusing. Skirts are a no, no with these chairs. - CW Same observations as Carol, personally aren’t too comfortable but still being used- JP</td>
</tr>
<tr>
<td>-----------------------------</td>
<td>--------------------------------------------------------------------------------</td>
<td>----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Serpentine seating, Davis Furniture Kontour Collection (to be used with EXO low lounge chairs)</td>
<td>Combination Contour yellow serpentine with backs; 20” depth, 16.34” height</td>
<td>Is actually a patterned upholstery which is fine, maybe even better than the yellow. Is of sturdy material. -CW People are reallygravitating to these, lots of use, comfortable and complemented nice with round working tables- JP</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Popular.                                                                nan</td>
</tr>
</tbody>
</table>
Davis Collection
Round networking
table

84” round, 20” high
Low tables, almost too low according to one student. Nice quality...waitin
g on electricity to see how these get utilized. -CW
Low tables but still can be used efficiently by students, handy to have the power to charge devices-JP

Popular with the serpentine seating.

Davis Collection
EXO high back lounger
(for networking tables)

Exo’s high back lounger on the open side of the tables
Really nice low chairs, sturdy and comfortable. We’ll see how the white holds up but the material is nice. Comfortable, but could be too low for some, white is holding up as of now-JP
Had one student report to me that she loves these.
Space 2: Collaborative viewing/work area

<table>
<thead>
<tr>
<th>Item</th>
<th>Description</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>Steelcase Mediascape Lounge</td>
<td>From Red Thread (Springfield); only Steelcase distributor</td>
<td>Is of blue material that is already soiled. Perhaps need a protective cover or sturdier material. Provides a nice sleeping area for sleepers. - CW Constantly in use, monitors will boost even more use. Might need a protective cover as time goes on. - JP</td>
</tr>
</tbody>
</table>

Pop-up Laptop tables

These arrived! Seeing use. - CW
Don’t see much use in these as of yet, could improve going forward-JP
Would order in an even more neutral color like black or the birch in use, color scheme competition - JA

Height Adjustable laptop tables

These arrived! Seeing use. - CW
Don’t see much use in these as of yet, could improve going forward-JP
Would order in an even more neutral color like black or the birch in use, color scheme competition - JA
<table>
<thead>
<tr>
<th>Collaborative Viewing area by Jasper Group JSI Connect Collection</th>
<th>Jasper Group JSI Connect Collection with tombstone table, 11 or 12&quot; deep shelf on back side. Power on backside, sides and table for use with high stools.</th>
<th>This is the orange one that is missing the wooden laptop tables I think. The big U shaped collaborative area had to be divided as it was really too large. There was a mixup and so we will actually have another one (that means two u-shaped and two diner-like seating areas. Sturdy but unit we get the technology installed, students are using it to study on the table. - CW</th>
</tr>
</thead>
<tbody>
<tr>
<td>Gordon Intl. Creature Collection</td>
<td>Adjustable height stool with or without foot perch</td>
<td>These are white; they seem fine. - CW These work nice despite the odd look they are comfortable and used often - JP</td>
</tr>
<tr>
<td>Davis Collection Lipse stool</td>
<td>Adjustable stool</td>
<td></td>
</tr>
</tbody>
</table>
| Herman Miller Magis Lyra Stool | Saddle type seating stool | Nice. - CW  
These look great and are holding up well - JA |
|-------------------------------|--------------------------|--------------------------------------------------|
| Herman Miller Bombo Adjustable height stool | Adjustable height stool | Ours are blue. These seem fine to me. I think we’ll see more use of these types chairs when the technology is up and running. - CW  
Anthro study: low comfort |
## Space 3: Alternative seating/working model
### Alternative seating

<table>
<thead>
<tr>
<th>Item</th>
<th>Description</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>Casual seating</td>
<td>Saucer chair. 28 x 32 1/2 x 26 1/2&quot;; comes in bright colors. These were child-sized and are now up</td>
<td>These were child-sized and are now up near the juvenile collection on the</td>
</tr>
<tr>
<td></td>
<td>near the juvenile collection on the 21st floor. - CW</td>
<td>21st floor. - CW</td>
</tr>
<tr>
<td>Plush beanbags</td>
<td>Cozy microfiber poof chair. The 100% polymer ultra-micro fiber fabric feels just like suede yet is</td>
<td>Beanbags are popular; not all that supportive but students are actually</td>
</tr>
<tr>
<td></td>
<td>stain-resistant, water-resistant and easily cleanable. The chair is also designed with added support</td>
<td>napping out in these things. - CW</td>
</tr>
<tr>
<td></td>
<td>so you can sit more upright. Removable, washable cover.</td>
<td>People are loving these, brings back the feeling of being young-JP</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Getting a tad soiled? Are they cleanable?</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Color competition, need to be conscious of color schemes - JA</td>
</tr>
<tr>
<td></td>
<td></td>
<td>How do they ever get cleaned? cw</td>
</tr>
</tbody>
</table>
| KI mobile writing screen | KI Connection Zone Mobile Writing Screen 36” W x 72” H | Really nice white boards; the ability to attach them together isn't obvious to the eye....and the purpose either for that matter. Quality stuff. - CW

Love the idea of these boards, promotes group work especially towards nighttime.-JP

Overheard that people like these, but there is not often a lot of writing on them - marker issue? - JA |

<p>| Davis Furniture Soft Chair Collection | Comes in many bright colors | These aren’t all that comfortable but seem sturdy. Ours are orange with partial upholstery. Not as popular as others so far. - CW |</p>
<table>
<thead>
<tr>
<th>Chair Model</th>
<th>Description</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>Herman Miller Spun</td>
<td>Rotating chair</td>
<td>Fun but as someone I know says, “Redonkulis.” Students sit in them for the fun but then find a more comfortable seat (although I did see a student sitting there with his laptop). - CW</td>
</tr>
<tr>
<td>Graffiti on one</td>
<td>of these - JA Students are confused re: these and don’t use them to study.</td>
<td>Great conversation piece; gets folks laughing. Lots of confusion re: this chair.</td>
</tr>
<tr>
<td>Zuo-Umea Arm Chair</td>
<td>16”-20” adjustable height square. Swivels 360 degrees</td>
<td>Ugly lime green, poor material that is soiled and pilly already. - CW</td>
</tr>
<tr>
<td>Zuo-Lund Arm Chair</td>
<td>16”-20” adjustable height round. Swivels 360 degrees</td>
<td>Same as above, green material is pilly and has a cheap feel to it. - CW</td>
</tr>
<tr>
<td>Furniture Type</td>
<td>Description</td>
<td>Feedback</td>
</tr>
<tr>
<td>----------------</td>
<td>-------------</td>
<td>----------</td>
</tr>
<tr>
<td>Partial green dining booths</td>
<td>Fairly popular, have the wooden shelves for laptops; sturdy.</td>
<td>-CW</td>
</tr>
<tr>
<td>Egg Chairs</td>
<td>Really popular, sound dampening, seem sturdy, heavy but moveable (with great effort).</td>
<td>-CW</td>
</tr>
<tr>
<td></td>
<td>Always filled, People are attracted to its quirkiness and seem to enjoy them.</td>
<td>-JP</td>
</tr>
<tr>
<td></td>
<td>Nice place to sleep!</td>
<td>-CW</td>
</tr>
<tr>
<td></td>
<td>Can we put wheels on the bottoms?</td>
<td>-JA</td>
</tr>
<tr>
<td></td>
<td>But get lots of stuff under the cushion.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Anthro study: high comfort</td>
<td></td>
</tr>
</tbody>
</table>
Patterned Chair

Don’t recall these being on the original furniture plan. These are HEAVY but sturdy. Practical chair and matches the serpentine couch thingie. -CW

Also matches the Herman Miller Magis Lyra Stool - JA
1: Research and Liaison Services Task Force

UMass Amherst Libraries
Research & Liaison Services Department
Review Task Force

Paulina Borrego
Madeleine Charney
Sharon Domier
Kate Freedman
Beth Lang (Chair)
Charlotte Roh
Annette Vadnais
Susan Perry (consultant)

Charge .................................................................2
Executive Summary.................................................3
Context......................................................................4
Literature Review....................................................4
Internal Feedback from Library and R&LS staff.................6
Environmental Scan of Research Services at Peer Libraries...7
Recommendations and Resources Needed.........................8
Sources.....................................................................15
Appendices................................................................17
Research & Liaison Services Department
Review Task Force Charge

Background: Recent publications report that the ubiquity of online resources coupled with the propensity to begin searches for information with a search engine has resulted in students and faculty using the traditional library services less than in the past. In spite of the perceived ease of self-guided online research, students are not necessarily more adept at realizing quality research results than they were in the past. Locally, the UMass Amherst Libraries have witnessed this trend through a drop in numbers of walk-in service transactions but with more comprehensive interactions with the students who do seek librarian help with locating quality information and formulating research questions. The Libraries’ 2013-2015 Three-Year Plan identifies four areas of strategic transformation. These areas align with the goals in the University’s Innovation and Impact: Renewing the Promise of the Public Research University. These framework documents highlight the need for the Libraries and the University to develop strategies and services that enhance scholarly productivity; align with learning outcomes and support curricular innovation; and participate in the lifecycle of the research, teaching, and learning enterprise.

The purpose of this review is to fully explore the current Research & Liaison Services (R&LS) Department service model and priorities, examine where there are gaps or where we may need to realign departmental priorities to meet library and university goals, and explore new or expanded services from a “best practices” point of view based on changes implemented at other academic libraries. The R&LS Task Force shall make recommendations to bolster curricular, learning, and research support for the University community.

Charge:

- Conduct an environmental scan of research services at peer libraries, including the emphasis placed on instruction, consultations, in-person point of need support, and promotion/marketing of these services
- Examine staffing models, duties, and responsibilities, including the use of peer mentors
- Propose changes to the consultation and instructional services currently offered by the UMass Amherst Libraries, including identification of clear priorities
- Develop (outline) scenarios to refocus staff on emerging needs and examine additional staffing needs
- Identify tools, skill sets and training necessary to support the recommendation

Submit a written report to the Director of Libraries by December 31, 2014 that summarizes the findings and the implications of the Task Force recommendations. This was extended to July 13, 2015.
Executive Summary

Process

In order to steadily connect with and deliver services to the current user base, primarily undergraduate students, the R&LS Department Review Task Force investigated

- the current literature
- service points in the library
- current practices by peer institutions

We particularly focused on staffing models that took a more comprehensive approach to delivering services at the point-of-need to the campus community.

Recommendations

The major recommendations of the task force are:

- Reconsider current reporting lines and collaborative structures within the Libraries to reduce internal silos and build a stronger network of support for service.
- Build stronger connections with external academic programs, starting with the Writing Program.
- Co-locate research and library support services within the Learning Commons at one desk to eliminate confusion by users.
- Train undergraduate student workers to provide peer-to-peer research support at the new co-located service point and to refer research-related questions as needed.
- Work with the Learning Commons Assessment Task force to expand private consultation space in the Learning Commons.
- Work with the Emerging Technologies Librarian to build or acquire an easy-to-use scheduling and triage software to make it easier for constituents to schedule research consultations with librarians.
- Work with the Undergraduate Outreach Librarian and the Library Development & Communications staff to determine effective strategies for promotion of services to the user base, particularly research consulting and instruction.
- Work with the Undergraduate Education Librarian to build a coherent information literacy program in the university (including but not limited to undergraduates) that emphasizes instruction and scaffolded learning outcomes.
- Extend online outreach and point-of-need service through LibGuides (or equivalent software), chat messaging, and learning management systems; consider 24/7 online service by sharing chat coverage with other departments, and continually adapt services to optimize changing technologies that support the research habits of our users.
Context

Reference has always been one of the core services that the library provides to the community. In the past, this was done on paper, in person, and by telephone. Since then, much has changed. Currently, librarians in the Research & Liaison Services Department (R&LS) still interact with users face-to-face and by telephone, but also through email, text, and online chat via the Libraries’ instance of LibAnswers, which is our current online reference platform, and through social media.

Most R&LS staff serve as subject liaisons to academic departments and programs in the humanities, social sciences, management, and nursing. Liaison duties include (but are not limited to) instruction, specialized research help, outreach about library services, assignment consultation, referral to experts, and production of online subject research guides.

R&LS librarians have been experiencing a steady increase in the number of individual research consultation requests (targeted requests for assistance sent directly to the librarian-specialist) both in-person and by email. At the same time, like the rest of the country, UMass Amherst librarians have experienced a slow but steady decline in the number of users who seek their assistance at the traditional reference desk. Recent steps taken to address this by the R&LS department include:

- Relocating our reference service point to a smaller desk but in a more visible location within the Learning Commons
- Better publicity about subject librarians, such as professional photos of liaisons used in rotating slides on the lobby electronic bulletin board

However, since the number of users seeking out face-to-face interactions at the reference desk has decreased, physical changes have limited impact. As of the writing of this report, there have been minimal changes to staffing of the R&LS department and no transformative changes in its operations. More proactive approaches are needed to reach a larger body of students, particularly undergraduates who need help acquiring research skills in order to succeed in higher levels of coursework.

Literature Review

In the last decade, academic libraries across a broad spectrum have seen their business at the reference desk slow down (Meyer, et. al, 2012). This is in large part a result of the digitization of library collections and the rise of the Internet (Arndt, 2009). Not all traffic is decreasing, however. Librarians at reference desks are seeing the proportion of complex research questions rise. Studies of this phenomenon draws two conclusions: Students are seeking answers to many of their simple research questions (READ Scale 1’s and 2’s) through Google and the library website. At the same time, students are still coming to librarians to help them navigate the abundance of information on the Internet and to help them create their research strategies (Meyer, et. al., 2012). In short, the drop in use of the reference desk does not
reflect a lack of need for research help, but it does seem to be a sign that the reference desk is not the best format for addressing all the needs of current students.

Libraries have responded to these circumstances in different ways. Some libraries have implemented peer-reference models, relying on undergraduates for all or some reference desk time. Coastal Carolina University Library, for example, has kept its reference desk, but staffs it entirely with advanced undergraduates. These undergraduates undergo a three-week training program with librarians before they begin staffing the reference desk independently. Librarians remain on call to deal with more complex questions. In general, libraries that have used undergraduates on the reference desk emphasize that recruiting motivated undergraduates and training extensively is crucial to maintaining a successful peer reference service model (Faix, et. al., 2009). A number of libraries have gotten rid of the reference desk entirely, relying on other service points to answer simple reference questions and to refer patrons to subject specialist librarians when needed. This approach has pros and cons. On the plus side, it frees librarians for more consultation work with advanced undergraduates, graduate students, and faculty, but it takes away an important avenue for outreach with the campus community (Miles, 2013).

The literature suggests that if the reference desk is removed or downgraded, it should be replaced by increased outreach and promotion in other sectors. The University of New Hampshire at Manchester and the University of Denver are among an increasing number of libraries that have replaced their reference desk with more extensive and rebranded consultation services. Often called Research Centers, these new consultation-based models rely on subject-specialists, or sometimes very well-trained undergraduate and graduate students, to help patrons with complex research questions and problems (Meyer, 2013; Fensom, et. al, 2006). Another approach is a “personal librarian” program, which takes the liaison model that librarians have used with faculty, and adapts it for use with undergraduates. These programs offer all incoming students a “personal librarian,” who contacts them occasionally through email. Around 30% of students reach out to their personal librarians as a result (Moniz, 2014).

Some of the best practices gleaned from the literature that are advisable to apply to the R&LS department at UMass Amherst include:

- Re-naming and rebranding the department and service point in a way that is more understandable to students. For example: Research Help, Research Center, Ask Us, Information (Faix, et. al., 2009; Miles, 2013).
- Create additional spaces for consultation services that are visible to library users, but which also provide a comfortable setting for in-depth conversations with librarians (Meyer, 2013; Fensom, et. al, 2006).
- Decrease librarian anonymity and further promote the subject and functional knowledge of specific librarians in their work with the campus community. Ex: rather than having one library chat account, create separate accounts for each individual and associate them with their specialties in that account; have each librarian use name placards while on the reference desk. (Mon and Harris, 2011).
• Make sign-ups for research consultations easy. Ex: use calendaring software that allows students to set up a research consultation without having to contact a librarian directly (Meyer, 2013; Fensom, et. al, 2006).
• Conduct on-going assessment to match the level of walk-in service to the needs of the community. Most studies show that some level of walk-in service is still necessary, but the specific needs vary from community to community (Meyer, et. al, 2012).
• Adopt a model of continuous improvement for these services. Libraries who have made changes have found that tweaks are necessary to adapt to the specific needs the campus community (Meyer, et. al, 2012).

Internal Feedback from Library and R&LS Staff

In January 2015, the Task Force conducted three focus groups with members of various library departments and service points: Circulation, Reserves, Interlibrary Loan, Liaisons, Digital Media Lab, Learning Commons, and Information Desk. The meetings were intended to gather input, increase mutual understanding of service roles, discuss potential changes in the delivery of library services, consider ideas for combining service points, and celebrate our successes in the way we currently deliver service to our users.

Some of the topics discussed in these meetings included:

• The need for improved communication between service points
  • There was some confusion about how and when to refer users to other departments
  • Cross training was offered as a solution so that people understand and respect different departments
  • A guide with base knowledge about the library was suggested with very positive responses

• Ideas for improving the user experience
  • The Du Bois building and layout: One constant challenge all service point staff who work within the Learning Commons have is the space. The Lower Level is a large area that is crowded with furniture and technology, thick brick columns and many corners (resulting in poor visibility), multiple service points, doors, corridors, and offices, and even a couple of classrooms
  • Multiple service points: Co-locating service points into one desk would reduce confusion amongst students

• Implications of co-locating service points
  • This would require training programs for all service point staff, so library users can expect consistent responses from any desk staff

• Sharing what we enjoy about our work
  • Each service point is proud of the work that they do to help users, and this is something we can keep in mind as we move forward
  • People are willing to partner in order to provide the best service they can to users
• The need for improved marketing of services to users
  • We are looking to the marketing workgroup to help us with this

The Task Force conducted a separate focus group with staff from the R&LS department, to gather their input about potential for new service roles, space needs for both offices and service point, to understand what staff enjoy about their work, and to make note of ideas for improvements.

**Environmental Scan of Research Services at Peer Libraries**

To assess current models of reference services, eight libraries were selected by the group to contact for an interview. The libraries were chosen because of these criteria:

1. Large public university
2. The university does not have a graduate program in library science

The “Head of Reference Services” at each site was emailed and asked to participate in our survey. Of the eight places contacted, we were able to schedule telephone interviews with six of them (one site did not respond, and one had scheduling complications). All respondents were very courteous and eager to talk about the changing nature of reference services. The following themes emerged:

• A majority still operates a dedicated reference desk; some are co-located with other services and some are free-standing.
• Reference desk is primarily used by undergraduate students.
• Desk hours are all statistic driven and based on usage numbers. Most are open Sunday-Friday, only a few keep Saturday hours.
• All offer chat, text, phone and email reference. Most cover these services while at the desk. Some use an on-call back-up schedule for virtual reference.
• Staffing: All staff with reference librarians and/or well-trained paraprofessionals. A few have students working alongside professional staff for basic information and tech help such as printing but they never staff the desk alone.
• All offer research consultations. Most use a form which gets emailed to the appropriate librarian. A small number are using a software appointment request system.
• Of those that have Learning Commons most still have multiple service points.

When asked if any had made recent changes to reference service provision, most responded that they are thinking about it but have not yet started the actual process. Actions being considered include:

• Consolidate service points
• Move staff offices all to one floor
• Staff service point with paraprofessionals and move librarians off-desk
• Shorten desk hours
• Increase librarian availability for consultations

It seems that the libraries interviewed are considering many of the same changes as we are at UMass Amherst, which confirms the need for changes in the R&LS department and the Libraries as a whole.

**Recommendations**

The task force has come to understand that there is no way to address all the issues in R&LS without the participation of the entire Library. The task force recommends that the work of research and liaison services be more holistically integrated into all library services. While the new spirit of the Librarians Engagement Team and its communities of practice will facilitate the process of communication and collaboration, the Libraries as a whole should experiment with changing our traditional divisions of responsibilities and our current structure of reporting lines.

The Research & Liaison Services Review Task Force believes that in order to refocus staff time and energy on emerging needs, the R&LS department operations and services should enhance

1. Collaboration
2. Online outreach
3. Information literacy
4. Research needs of users
5. Assessment

### 1. Collaboration

The Libraries have long stressed the importance of collaboration and worked hard to reduce the harmful effects of internal silos by merging some small departments into larger ones and eliminating the artificial divisions of technical and public service. However, new services tend to be established in new and independent units (such as UTLS, Scholarly Communication) rather than incorporated into existing units, such as R&LS. This has possibly hampered the integration of new services into R&LS staff toolkits.

While the new Librarians Engagement Team and Communities of Practice will help create a sense of team building and shared ownership, it could be further enhanced by considering the benefits of organizational realignments so that affinity services and staff work together more easily. Integrating Scholarly Communication and Assessment with Research & Liaison Services (or whatever new name is more appropriate) along with the positions of Undergraduate Education Librarian and the Undergraduate Outreach Librarian would remove artificial barriers and offer more opportunities and staff to explore new services.

Strengthening communication and parallel relationships between the supervisory staff of the Image Collection Library, Digital Media Lab, Library Systems, and SCUA would help to further joint initiatives across those units.
Examples:

- Working with the staff in the Digital Media Lab would ensure that requests for technical assistance would also be supported by instruction in research as appropriate.
- Including the staff of SCUA in planning meetings for information literacy and library instruction or serving as departmental liaisons would ensure that the Libraries’ unique holdings are well represented in research consultations and that the librarians and staff doing the teaching have a shared understanding of library services and collections.
- Pursuing closer connections with the Scholarly Communication Department is of prime importance, as faculty are increasingly turning to the library for help with scholarly publishing questions such as author rights, copyright issues, and others.

Co-location of staff and services in the Learning Commons will not only free up space and reduce confusion for users, it will lead to collaborative opportunities in cross-training and a common knowledge base. R&LS services should be part of a new co-located service point.

R&LS should also explore closer relationships with on-campus service providers such as the University’s Writing Program. The Writing Center is already located in the Learning Commons, and a more formal teaching, learning, and referral relationship would benefit users in providing a holistic support system. R&LS staff should engage in closer collaboration with service partners (such as SEL, SCUA, Image Collection, and Media Lab) in many activities including instruction, best practices of outreach to faculty, innovative teaching and learning, and help with data management plans.

2. Online Outreach

As previously noted, R&LS staff manage the Libraries’ online reference platform, LibAnswers, where users seek help via email, text and instant messaging (IM). Coverage of the email, text and IM service is offered whenever the reference service point is open, and is popular with the undergraduate population. We recommend building on the popularity of the IM service by extending hours of coverage to all hours the Du Bois Library is open. R&LS staff can train staff at the always-open Learning Commons Desk to respond to IM queries that come in when the R&LS service point is closed.

We recommend building on the successful examples of online reference service such as the many subject research guides and course guides produced by staff from Research & Liaison Services, and the Science & Engineering Library. The LibGuides platform makes the guides easy for library researchers to use and for subject librarians to create. These self-help guides offer research guidance when expert librarians are not available, and their availability should be part of a training program for all service point staff.
We recommend:

- Communicating regularly with the eLearning Department of Continuing and Professional Education, so they may integrate library resources and services into their instructional design and technical training for instructors teaching online courses.
- Communicating regularly with the Institute of Teaching Excellence & Faculty Development, so they may integrate library resources and services into their support for instructors teaching online courses.
- Communicating with co-curricular groups include residential areas (e.g. RAPS), learning communities, athletics, international programs, Admissions, and others to advertise online resources, services, and instruction opportunities tailored to their specific areas.
- Inviting professors in academic colleges or staff members who work with co-curricular departments out for coffee
- Partnering with IT, promote learning objects and programs, particularly when certain programs are already successful and for which library skills would be a natural fit.
- Working with faculty to ensure LibGuides are accessible in Moodle and Blackboard learning management systems.
- Working closely with the Library Marketing Working Group to promote services.
- Working closely with faculty to promote and advise on copyright issues, publication, and the use of Open Educational Resources.
- Upgrading the chat client so users can see and use chat from the page they are currently viewing.
- Partnering with Emerging Technologies Librarian / Web Working Group, design a creative mobile app for the Libraries.

3. Information Literacy

As noted earlier in this report, the Internet has drastically expanded the amount of information that anyone can access. While the main role of the instruction librarian in the pre-Internet age focused on showing students what is available in the collection, and how to access that material, it now also includes teaching students about scholarly modes of communication, evaluating the credibility of sources of both a scholarly and popular nature, finding useful information via searching in databases and on the web, creating information, and using information ethically.

Teaching this matrix of skills to UMass students is most effective when R&LS librarians collaborate with the Undergraduate Education Librarian, the Librarians Engagement Team, and the Librarian Engagement Team Advisory Committee to design strategic and coordinated approaches to fulfilling the teaching and learning mission of the department.

The taskforce recommends drawing upon the approach advocated in the ACRL Immersion curriculum:
• To utilize departmental curriculum maps to identify the places in the curriculum that would reach the largest number of students and strategically shaping the instruction program to target those key courses while curtailing instruction in non-key courses.
• To develop instruction program outcomes that articulate the teaching and learning goals of the library and the university.
• To create a flexible curriculum that strategically addresses those outcomes, with the goal that each student leaves UMass with a strong foundation of critical information literacy skills and knowledge.
• To regularly evaluate and assess the success of our defined outcomes.
• To work with Scholarly Communications staff members to increase expertise with scholarly communications (including open educational resources, copyright issues, author rights, and publication).

4. Research Needs of Users

Assisting library users with their in-depth research needs is a traditional function of the reference librarian, and R&LS staff have been successfully fulfilling this role throughout their careers. Much has changed in the research process over the years, as the universe of available literature, reports, data, images, art, music, files and objects in all formats continues to expand exponentially. No one librarian can be expert in everything and that is why collaboration and consultation take on increased importance. In-person consultation requires adequate and comfortable space.

To meet students where they are, which is increasingly online using mobile devices, librarians must have access to compatible technology and software with training in its use. Requirements for successful research consultation service are:

• Space needs: locate a new research consultation center with or adjacent to the writing center, in the Learning Commons. Ensure that the most current technologies are available, for both in-person and online consulting.
• Acquire a simple-to-use scheduling and triage software to make it easier for constituents to schedule research consultations with librarians, both in-person and virtually.

The expectation is that individual research consultations will continue to increase, but there still must be access to walk-in research help. A combined service point within the Learning Commons, with peer-to-peer research help can be a good “first stop” for library users seeking assistance. Rigorous training of the peer mentors is essential. R&LS staff will support the training program for the peer mentors, but there must be one position dedicated to managing the research service point staff and training. A new position of “Research Desk Manager” is imperative to ensure the success of this new initiative.

When more in-depth research help is needed by walk-in users, follow-up assistance will be covered by:
• on-call librarians from R&LS
• Schedule appointment with expert librarian
referral to subject LibGuides (when research services are closed). LibGuides must be kept current and our instance upgraded to version 2.

5. Assessment

Assessment efforts have been prominent throughout the library to help make user-focused decisions related to library hours, staffing, training, and location of desk/services. The R&LS department uses LibAnalytics to track each patron interaction both at the reference desk as well as those interactions ‘off-desk.’ The READ scale (Gerlich & Berard, 2007) helps provide a fuller picture of the depth and complexity of reference questions encountered.

The R&LS department also uses LibAnalytics to track instruction sessions. Data gathered can be used to glean information about student populations served as well as information literacy efforts across campus.

The R&LS Task Force recommends that the R&LS department members:

- Continue to use LibAnalytics to track individual patron interactions as well as instruction sessions
- Work with the Assessment Librarian to explore what other types of information might be gathered to inform reference outreach efforts
- Collaborate with the Undergraduate Education Librarian to explore and understand new information literacy frameworks. Create an instruction evaluation form that reflects these new standards.
- Create a culture of assessment to continually monitor R&LS data gathered to inform new departmental initiatives.
- Work with the Assessment Librarian to assess the effectiveness of LibGuides and other online reference tools

Actions to take now:

1. Co-location of staff and services in the Learning Commons will not only free up space and reduce confusion for users, it will lead to collaborative opportunities in cross-training and a common knowledge base. In preparation for a future co-located service point, immediate steps to take include:

   - Creation of FAQ based on the current information desk student training materials.
   - Solicitation of similar training materials across departments in order to compile them.
   - Creation of a training team with a representative from each department.
   - Design training program for eventual implementation of peer-mentors for initial research help at the combined service point.
   - Conduct environmental scan of peer-to-peer training programs used at other institutions.
2. Train staff at the Learning Commons & Technical Support Desk on the use of Instant Messaging within the LibAnswers platform, so coverage hours may be extended.

3. Elevate the access point to LibAnswers to the main library web page, to improve findability of the service (it is presently buried three clicks away from the main page).

4. Work with faculty to ensure LibGuides are accessible in Moodle and Blackboard learning management systems.

5. Build connections between R&LS staff, and staff from the Writing Program, and start to plan for a combined “research center” service.

6. Work with Library Development & Communications staff, and Undergraduate Outreach Librarian to determine effective strategies for promotion of services to our user base, emphasizing research consultation and instruction.

7. Use Librarian Engagement Team (LET) meetings to strengthen communication and collegiality between departments.

8. Develop opportunities for practical use of the new ACRL Information Literacy Frameworks, as well as methods for communicating this paradigm shift to faculty.

**Actions that will need resources:**

1. Build a single service point within the Learning Commons for library services.

2. Increase private consultation space (the Research Consultation Center) within the Learning Commons.

3. Work with the Emerging Technologies Librarian to acquire and implement scheduling and triage software.

4. Identify staff and materials to train and support research support services (primarily students) at the single service point. A new position of Research Desk Manager, located within the R&LS Department, is essential to ensure that the extensive training of students who will staff research support services is superior and will result in successful service. This person should be in place prior to hiring of student desk staff.

5. Upgrade the chat client so users can see and use chat from the page they are currently viewing.

6. Upgrade our instance of LibGuides from version 1 to version 2. Version 2 is now the standard in use at the majority of academic libraries that subscribe to LibGuides.
7. Build a librarians’ toolkit, with LET and LETAC taking the lead on this. As an example, set-up a resource bank of digital learning objects, assignments, active learning exercises and other tools that capitalize on reusability.

**Organizational actions (collaboration and endorsement will be required):**

1. Re-evaluation of the current structure of departments and reporting lines. Seek endorsement by SMG for a new Task Force or other group to study reorganization of department lines, and offer greater support and coordination for managers at all levels within the organization. Why? An emerging need identified by the R&LS Task Force is better coordination of teaching, research, undergraduate and graduate user services.

2. Work with the Learning Commons Assessment Task Force to identify space for a “research center” where a holistic support system for teaching, learning, writing and researching can be established.

3. Work with the Learning Commons Assessment Task Force to design and implement a more visually appealing display of the print reference collection. Get rid of the current floor-to-ceiling “stacks” shelving now in use and move books to a combination of the alcoves and new low shelving that should be handily located near the research consultation / writing center.
Sources


Courtney, Michael and Sara Wilhoite-Mathews. “From Distance Education to Online Learning: Practical Approaches to Information Literacy Instruction and Collaborative Learning in Online Environments.” Journal of Library Administration 55.4 (2015):261-277


University of Massachusetts Amherst Library Engagement Team Frameworks. May 2015. [http://intranet.library.umass.edu/intranet/documents/files/Librarian_Engagementment_Program_051315.docx](http://intranet.library.umass.edu/intranet/documents/files/Librarian_Engagementment_Program_051315.docx)

*Report approved by SMG, 09/23/2015*
Appendix A.

Questions for peer libraries:

1. **How reference services work in your library:**
   - Do you have a dedicated Reference Desk?
   - Who participates in providing reference (point of need) service?
   - Do these same staff also provide library instruction?
   - What factors into scheduling of the staff who rotate on the ref desk?
   - Do students staff the Ref Desk? Undergrad or Grad? How are they trained?
   - Do paraprofessionals staff the Ref Desk? How are they trained?
   - What modes of reference do you offer? Describe (i.e. in person, email, text, chat, etc...)
   - What population uses the reference desk the most?
   - Do you have a consultation alternative (to drop-in reference help)?

2. **Do you have a Learning or Information Commons?**
   - If yes:
     - What other non-library academic support services (ie writing center, technology support, etc) have a presence in your Learning Commons?
     - Can you describe ongoing relationships that you have with these groups?
     - Do you have a single service point or multiple service points for library services? Can you describe?
     - How do you keep library users from getting confused about what type of help is available at each service point?
   - If no:
     - Can you describe ongoing relationships that you have with other academic support services on campus (ie writing center, technology support, etc)
     - Do you have a single service point or multiple service points for library services? Can you describe?

3. **Has the way you offer reference services changed in the past 2 years?**
   - If yes: How? Have you assessed the success/failure of the changes?
   - If no: Do you plan on making any changes? When & what?

4. **Any other thoughts/ideas you’d like to share with us regarding reference
## Appendix B.

**Peer Institution Phone Call Survey**

<table>
<thead>
<tr>
<th>Institution Name</th>
<th>Contact Person</th>
<th>Phone Call Date</th>
<th>Phone Call Duration</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>Kent State University</td>
<td>Jane Smith</td>
<td>Jan 05, 2015</td>
<td>60 minutes</td>
<td>接触图书馆和学生服务中心，研究了相关文献和教学方法，讨论了未来的发展方向。</td>
</tr>
<tr>
<td>University of Michigan</td>
<td>John Doe</td>
<td>Feb 10, 2015</td>
<td>45 minutes</td>
<td>通过电话与图书馆人员和学生进行了交谈，了解了他们的工作情况。</td>
</tr>
<tr>
<td>State University of New York</td>
<td>Mary Johnson</td>
<td>March 15, 2015</td>
<td>1 hour</td>
<td>通过电话与图书馆人员和学生进行了交谈，了解了他们的工作情况。</td>
</tr>
<tr>
<td>University of Illinois</td>
<td>David Black</td>
<td>April 20, 2015</td>
<td>30 minutes</td>
<td>通过电话与图书馆人员和学生进行了交谈，了解了他们的工作情况。</td>
</tr>
<tr>
<td>State University of California</td>
<td>Susan Brown</td>
<td>May 30, 2015</td>
<td>45 minutes</td>
<td>通过电话与图书馆人员和学生进行了交谈，了解了他们的工作情况。</td>
</tr>
</tbody>
</table>

Note: All calls were made between 9 AM and 5 PM, Monday to Friday, except for May 30, 2015, which was during a school holiday week.
## Peer Institution Phone Call Survey

<table>
<thead>
<tr>
<th>Institution</th>
<th>Check-in Type</th>
<th>Standard</th>
<th>Standard</th>
<th>Note</th>
<th>Note</th>
</tr>
</thead>
<tbody>
<tr>
<td>NA</td>
<td>NA</td>
<td>Yes</td>
<td>Yes</td>
<td>NA</td>
<td>NA</td>
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<tr>
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<td>NA</td>
<td>Yes</td>
<td>Yes</td>
<td>NA</td>
<td>NA</td>
</tr>
<tr>
<td>NA</td>
<td>NA</td>
<td>Yes</td>
<td>Yes</td>
<td>NA</td>
<td>NA</td>
</tr>
</tbody>
</table>

*Note: The survey results are summarized here. Each row represents a different institution, with columns indicating whether a specific condition or practice is observed (Yes), not observed (No), or no data available (NA). The last column includes any additional notes or observations made during the survey.*
# Peer Institution Phone Call Survey

<table>
<thead>
<tr>
<th>Institution</th>
<th>Contact Person/Role</th>
<th>What modes of PDC do they offer?</th>
<th>Who uses the PDC the most?</th>
<th>Do the staff have a consultation model?</th>
<th>Are there any other staff or equipment used?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cornell ALV</td>
<td>Email, chat, and in-person</td>
<td>Email, phone, and in-person</td>
<td>Email, phone, and in-person</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>Upstate SU</td>
<td>Email, phone, and in-person</td>
<td>Email, phone, and in-person</td>
<td>Email, phone, and in-person</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>NC State UN</td>
<td>Email, phone, and in-person</td>
<td>Email, phone, and in-person</td>
<td>Email, phone, and in-person</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>UT Austin</td>
<td>Email, phone, and in-person</td>
<td>Email, phone, and in-person</td>
<td>Email, phone, and in-person</td>
<td>Yes</td>
<td>Yes</td>
</tr>
</tbody>
</table>

Note: For the institution abbreviations, please refer to the provided list.
## Peer Institution Phone Call Survey

| Institution | Contact Person/School | Academic Coordinator | Academic Coordinator | Academic Coordinator | Academic Coordinator | Academic Coordinator | Academic Coordinator | Academic Coordinator | Academic Coordinator | Academic Coordinator | Academic Coordinator | Academic Coordinator | Academic Coordinator | Academic Coordinator | Academic Coordinator | Academic Coordinator | Academic Coordinator |
|-------------|-----------------------|----------------------|----------------------|----------------------|----------------------|----------------------|----------------------|----------------------|----------------------|----------------------|----------------------|----------------------|----------------------|----------------------|----------------------|----------------------|----------------------|----------------------|
| Central FLV | NA                    | NA                   | NA                   | NA                   | NA                   | NA                   | NA                   | NA                   | NA                   | NA                   | NA                   | NA                   | NA                   | NA                   | NA                   | NA                   | NA                   | NA                   |
| NorthFLY   | NA                    | NA                   | NA                   | NA                   | NA                   | NA                   | NA                   | NA                   | NA                   | NA                   | NA                   | NA                   | NA                   | NA                   | NA                   | NA                   | NA                   | NA                   |
| SouthFLY   | NA                    | NA                   | NA                   | NA                   | NA                   | NA                   | NA                   | NA                   | NA                   | NA                   | NA                   | NA                   | NA                   | NA                   | NA                   | NA                   | NA                   | NA                   |
| WestFLY    | NA                    | NA                   | NA                   | NA                   | NA                   | NA                   | NA                   | NA                   | NA                   | NA                   | NA                   | NA                   | NA                   | NA                   | NA                   | NA                   | NA                   | NA                   |
| Central FLV | NA                    | NA                   | NA                   | NA                   | NA                   | NA                   | NA                   | NA                   | NA                   | NA                   | NA                   | NA                   | NA                   | NA                   | NA                   | NA                   | NA                   | NA                   |
| NorthFLY   | NA                    | NA                   | NA                   | NA                   | NA                   | NA                   | NA                   | NA                   | NA                   | NA                   | NA                   | NA                   | NA                   | NA                   | NA                   | NA                   | NA                   | NA                   |
| SouthFLY   | NA                    | NA                   | NA                   | NA                   | NA                   | NA                   | NA                   | NA                   | NA                   | NA                   | NA                   | NA                   | NA                   | NA                   | NA                   | NA                   | NA                   | NA                   |
| WestFLY    | NA                    | NA                   | NA                   | NA                   | NA                   | NA                   | NA                   | NA                   | NA                   | NA                   | NA                   | NA                   | NA                   | NA                   | NA                   | NA                   | NA                   | NA                   |

**Based on feedback from other academic coordinators and academic directors.**
## Peer Institution Phone Call Survey

<table>
<thead>
<tr>
<th>Institution</th>
<th>Notes</th>
<th>Contact Person/school</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

- Subject Librarians from General and Subject Librarians became part of the Library Research Group and the Librarian Development Team.
- Research and Circulation issues are being handled by the new Director.
- Subject Specutors: One subject librarian, one subject specialist, and one assistant.
- They have started using READ to call. Chat questions have increased.
- Have more service in person questions, which is fine.
- The main table and the Research Desk have moved.
- Any additional thoughts or ideas?
2: Access Services Workflow Review Task Force

University of Massachusetts

Learning Commons assessment Task Force
final report

Final Report & Recommendations
Overview

Access Services at the University of Massachusetts Libraries is currently made up of the following aggregate of departments: Circulation, Reserve Services, Stacks Management, Billing, Interlibrary Loan and Maps. With the merging of functional areas (circulation and reserve services), the loss of several staff positions, the maintenance of a 24/5 service model and the shift to a collection model that favors digital materials, it is time to reexamine the way Access Services actively engages with users, provides service, shares tasks and schedules and trains staff in order to provide a relevant, responsive and efficient operation to handle these tasks now and in the future.

Process:

The Access Services Workflow Review Task Force began a bi-weekly meeting schedule on September 19, 2014. During the fall the group reviewed the task force charge, the Libraries Three Year Plan: FY2013-2015 (draft rev. 8/25/14) and several readings relevant to our work.

As directed by our charge, we worked towards a “Phase One” progress report to be submitted on January 1st to the Director of Libraries, Jay Schafer.

In that report we sought to “tell our story”:
- Collect internal data (staffing levels, and analyze statistics over the past 3-4 years)
- Relate what the units in Access Service do in alignment with the 3 yr. plan
- List positions and roles.
- Describe how we serve internal and external clients
- Describe how our work intersects with other library units
- Detail the collaborative and cross-functional refinements we have already made to workflow.

This report is available under separate cover.

Our “Phase Two” activities were more externally focused and we concentrated on creating a response to the following directives from our charge:

1. Review current staff positions and schedules. Outline recommendations to update and standardize paraprofessional job descriptions in Access Services to enable greater flexibility across functional boundaries.
2. Conduct an environmental scan of Access Services Departments at peer institutions with similar collection size, consortial relationships, hours and volume of work. Examine collaborative staffing models, levels, duties, and responsibilities at these peer libraries. Examine alternative service models and articulate best practices in Library customer service environments.
3. Recommend changes to workflow, staffing and scheduling models and tools to increase efficiency and improve service, while making the best use of staff, positions and talents. Describe new staff positions to address gaps if needed.

4. Identify tools, technologies, skill sets and training necessary to support the recommendations.

During “Phase two” work, our group actively engaged with peer libraries to learn how similar organizations are handling the work and services offered by the units currently in Access Services; providing optimal staffing levels and the most efficient organization and distribution of tasks in order to provide the best patron service.

The phase two report, outlining activities and recommendations in greater specificity, is also available under separate over.

Findings and Conclusions

While our primary mission in our phase two activities was to learn more about ways we could refine and enhance our workflows, staffing models and services, we also found that our departments are facing many of the same conundrums and questions that other library Access Services areas are. And we found that, by comparison to the representative sample of libraries we spoke with, we are already doing many things very well and at a high level of efficiency.

What follows next is a summary list of our findings and the recommendations that we formulated after our environmental scan was completed. They are also a result of extended conversations within the Task Force. Additional detail for some of the recommendations can be found in our Phase Two Report. In addition, we had periodic contact with two other important library task force groups that performed their work in a parallel timeframe: the Research and Liaison Services Task Force and the Learning Commons Redesign Task Force. These conversations also informed our recommendations.

Libraries we interviewed included:

- University of Connecticut
- University of Illinois at Urbana-Champaign
- Kent State University
- University of Maryland – College Park
- North Carolina State University
- Colorado State - Fort Collins
- Washington State University
Things we are doing well:

While it is clear that we should always be looking for ways to improve and enhance our services and workflows it is also worth pausing to remind ourselves of the very good work that we already do; that we have a lot to be proud of. With two-thirds of all direct patron Library Service interactions handled by Access Services, we provide ongoing, dependable fulfillment and service support that is vital to library users. This is the result of tight, cross-functional engagement among the Access operating units, and ongoing interdepartmental collaboration across the Libraries. We serve as a leading example of innovation in service delivery among the Five College Libraries and in the Boston Library Consortium and provide direct support to the needs of academic departments and other external constituents on campus along with a host of other academic libraries and institutions. The list that follows attempts to capture the good work and successes that currently distinguish Access Services at the University Libraries:

- Expedited communications across Access Services with all access services staff email listserv.
- Cross-training within Access Services and cooperation that extends across the organization. Recognizing that we can always do more of this and do it better, this bullet is also first in the list of things we can do now – next section. The repetition is intentional.
- Books on Demand: purchasing recently published material based on real-time demand.
- Offering a free, full-service, article to desk-top and book to doorstep delivery to UMass patrons living at a distance.
- Expert searching and collection knowledge. Going as far as we can to get an item for our patron (including international requesting, extensive citation work, etc.) while rarely passing on charges to our patrons
- Continuous process improvement to streamline and automate workflows and services, including working with innovative leaders in resource sharing.
- The ability to make unmediated requests from the 5-College Catalog, and from BLC libraries through WorldCat Navigator
The ability to pick up any requested items (from 5-College catalog, World Cat Local, and Interlibrary Loan) at the preferred library location (Du Bois or SEL)

Establishment of a single point service desk in the Science & Engineering Library

24/5 access to facilities and materials at the DuBois Library.

Staff members that are available at service desk during peak hours and on call during all other service hours.

Online forms for borrower, proxy and carrel applications.

Fast turnaround process for visiting groups getting borrower cards.

Parking validation!

Centralized Billing for UM libraries fines and replacement

Well organized, timely and recently automated Billing practices. We send files of debits & credits twice weekly to Bursar's Office and reconcile files the day of posting.

We purge older files on a regular schedule.

Consolidated retrieval process for UM, Four Colleges, Reserves, ILL lending and ILL articles with very fast turnaround time.

Quick turn around on pulling

Quick turn around on re-shelving.

Quick turn around on searches with follow-through on missing materials.

Stacks Management location near all other Access Services units facilitates quick searches and location of materials and improves collaborative work.

Attention to student worker (future donor) morale.

Customer Service flexibility to meet immediate needs for both library patrons and staff colleagues

We provide scanning services for Electronic Reserves – many places require faculty to provide the article themselves.

Promote cost savings by encouraging faculty to assert Fair Use, and to place personal copies of textbooks on Reserve.

We handle copyright permissions as needed so faculty don't have to deal with it.

We manage streaming conversion process in-house: Fast turnarounds because we're not dependent on external entities to deliver streamed materials.

Streaming reserves services: a large number and variety of courses are served.

Our approach to streaming also encourages faculty to assert fair use rights.

We collaborate closely with Scholarly Communications office to encourage use of Open Access Resources and to promote the Open Education Initiative.
Changes we have made in the course of our Task Force work:

Continuous improvement and streamlining has not stalled during the course of Task Force work. The following improvements have occurred or are currently in process:

- Recent automation of the billing process will eliminate paper files and manual data entry in billing "export to bursar" process, eliminate paper files wherever possible.
- Recent integration of E-Reserves requesting with the new Amazon Textbook adoption tool.
- Recent integration of E-Reserves requesting and delivery of materials within the 2 campus learning management systems, Moodle and Blackboard Learn.
- Ongoing implementation of a new Copyright permissions tool for Reserves that bases charges on use rather than course enrollment. (SPIX)
- Eliminate the student staffed desk in the 6th floor music/media collection and have stacks maintain the collections, standardizing and integrating this workflow, inventory, etc. into stacks operations.
- Created a new pick-up location at the Science and Engineering Library for ILL and BLC Navigator materials.
- Expanded the Books on Demand program to include students and staff, while streamlining the workflow for this program through collaboration with Acquisitions.
- Started a task force to take a comprehensive look at our ILLiad request forms and find solutions to make them more user-friendly and informative for ILL staff.
- Created a collaborative work station in the ILL office to encourage interactive training and knowledge sharing.
- Subscribed to the Atlas Systems Concierge service, providing a high-level of innovative service for Ares and ILLiad software to ensure that we stay at the cutting edge of Reserves and ILL services.
- Stacks Management is now handling all Reference material re-shelving.
- Stacks management is now handling Hold shelf material check-in and in-house use recording for hold shelf materials that were not picked up.
- Stacks Management is communicating with IRM when open holdings records for canceled journals are encountered.
- The Maps department was added to Access Services in December of 2014, in the middle of our Task Force work. Since that time we have started thinking about ways that the supervisor of the maps collection can participate in cross area support while still overseeing that service point. ILLiad ILL/DD software and ARES E-reserves software have been installed on her computer and training in providing assistance that can be done remotely is planned.
Recommendations for future action are outlined below:

**I. Actions we can take right now (no additional resources needed):**

- Continue to pursue additional cross-training and cross-departmental support ideas, as well as planning/training more systematically for this within Access Services and with other departments in the Libraries and campus where work and skills affinities are apparent.
- Shift/reorganize staff to match the ebbs and flows or workload in various depts.
- Continue to find innovative ways to improve ILL turnaround times and to provide consistent service to UMass patrons (this includes streamlining workflows and automating processes wherever possible)
- Continue to streamline and improve ILL services, policies and accounts to make requesting easier for patrons to navigate. Examples could include: deeper integration of document delivery workflow to ensure more rapid turnaround times, the integration of ILL borrows into Aleph patron accounts, and the use of NetID credentials for the ILLiad system login
- Update and formalize the hospitality standards and expectations for service desk interactions.
- Develop an e-resource linking workflow for E-Reserves so that work during peak demand periods could be distributed/parsed out among additional staff and trained students.
- Streamline returned materials processing; Have service desk students do a "rough sort" for returned materials at the Circ/Reserves service desk during slow activity times. This will facilitate “final” sorting in Stacks Management. This will help occupy Service Desk students better during slow periods and make things easier for Stacks Management. Develop a training plan for Circ/Reserves service desk students that includes training in Stacks Management operations in order to provide more in-depth familiarization with the collection.
- Create a billing inquiry ticketing form on the LibWire Support Desk system to allow Library staff in any area to hand off inquiries related to patron bills, and to confirm resolution of those inquiries.
- Standardize physical reserve labeling and procedures. Use a single request form, provide consistent labeling, etc.
- Investigate making changes to the reserves OPAC so that it becomes more intuitive and visually appealing. Consider modeling on Rob O’Connell’s 5 College All Staff lightning talk, where he demonstrated a visually appealing library catalog for Smith’s media collection.
- Eliminate the requirement for Reserve material users to learn how to look up call numbers. Stop using the question “do you know how to look up the call number?” and replace with “let me help you find the call number.” Hopefully, this will make the interactions more positive.
• Formulate various circulation policy changes and communications that will help to remove workflow stumbling blocks and improve patron service. These recommendations would need to be vetted through various groups, but could be developed now.
• Streamline copyright clearance by establishing a “rule of thumb” that enables the rapid evaluation of what is permissible under fair use and involve Laura Quilter when more complex cases arise.
• Provide links to physical reserve items within ARES through the Reserves OPAC. This would reduce the duplication of entering information into both systems and would organize all reserve material information into one place for the patron (Aleph ticket already in)
• Integrate Maps staff into cross area support through training in Illiad and ARES duties that can be done remotely
• Integrate Maps staff and facilitate knowledge sharing about maps with other Access Services Units through attendance at departmental meetings and the active provision of opportunities to provide overviews, tours and support to questions pertaining to the maps collection.
• Create opportunities for better cross area communication within Access Services through the announcement of all departmental staff meetings and the delegation of a representative from one unit to attend the meetings of the other for the purpose of knowledge sharing and participation.
• Find ways to encourage staff to provide opportunities for their colleagues in Access Services to learn more about each other’s jobs and roles through presentations, departmental open houses, individual to individual offers and requests to share during times when workload allows.
• Review, refine and automate statistics gathering (as possible) for all AS areas.
• Continue to examine statistical trends to inform staffing and service decisions in all areas of AS.

II. Things Access services could do with more resources.
• Restructure the ILL staffing model to include both ILL Lending and Borrowing workflow specialist positions to oversee day-to-day processes and provide additional leadership and back-up within the ILL department.
• Refill the vacated Reserves Specialist position (which was similar to the Interlibrary Loan and Document Delivery Specialist); specifically, a role that would supervise the day to day processing of reserve services (Print, Digital, Streaming), assist with and provide back-up for the technology management and integration with other campus systems and support the day-to-day support of digital reserve materials fulfillment. This would allow the Coordinator to focus on goal setting, marketing and promotion of those services, as well as coordinating with other library departments
to integrate reserve services into the Library Engagement Team framework, our Open Educational Resources and Open Access Initiatives and Copyright Services team.

- **Course materials consultation services:** Coordinate with other departments, including Scholarly Communications, Reference/Liaisons, E-Resources, and Reserves in order to provide assistance to faculty seeking guidance on selecting materials to support their teaching. Form a team that meets semi-annually and coordinates responses to faculty inquiry.

- **Evaluate the feasibility and desirability of offering campus delivery and pick-up of physical items via Document Delivery (ILL)**

- **Implement an email contact management and tracking system to enable efficient, timely, and targeted communications to our various constituent groups and maintain communication history on a shared platform among staff. University of Maryland uses MailChimp for this purpose.**

- **Explore utilization of technology to improve our shelf reading and other activities. For example, use tablets with a current inventory list while shelf reading. Coupled with a bar code scanner we could improve inventory and shelving accuracy.**

- **Explore creation of a stacks map tool that provides a map for call numbers and directions to items listed in the online catalog. (Ian W and Michael M. have discussed this.) Investigate StackMap software as a possibility.**

- **Require departmental badges for desk and stacks students for easy identification by patrons seeking assistance. This will also keep student staff mindful of their purpose and responsibility when on the job.**

- **Work with Digital Strategies Group to improve the functionality of our in-house streaming media service interface; make it searchable and add the ability to add multiple files at once.**

- **Work with Library Systems to bring the streaming media service in line with the responsive design of the new library website, specifically making the films viewable for mobile users.**

- **Limit legal liability for copyright infringement by continuing to license additional streaming content and/or limiting the amount of full length films.**

### III. **Actions we need endorsement from the organization and collaboration from other areas to accomplish:**

- In order to align our services with patron expectations and to streamline service to them consider these shifts in where the following activities are administered:
  
  o Consolidate Du Bois ‘Lost and Found’ materials and processes within Building Operations. Lost and Found is currently split between Building Operations and the circulation desk and governed by a somewhat complex set of rules for what belongs in each. Patrons (and staff) often find this confusing and frustrating. Centralizing
this to a desk that handles security and building operations and that regularly connects with the UMPD would streamline and centralize the patron’s experience.

- Consolidate Carrel operations and oversight within Building Operations. Space allocation, building regulation and policy enforcement already reside within Building Operations and staff and student staff are already making regular rounds of the facility. Oversight of this aspect of building use seems a more natural fit from a service and workflow perspective.

- Move from keyed lockers where patrons must go to the circulation desk to obtain a key in order to use a locker to a self-service model. This would transform what is currently a very inconvenient model for patrons into a more efficient approach. Also consolidate the oversight of lockers within building operations as this is where issues with locks are currently handled.

- Until the Parking Garage moves to an automated system, Parking validation should be available at all service desks on E, the LL and the DML.

- Work with other library units to create and design a co-located or single service point for library users. Experiment with models now, within our current configuration to begin to understand the ways that we may best work together to staff a single service point/ co-located service point.

- Work with other service points to develop a standard "common knowledge set" and ready reference skills for all service desk staff and student staff ensuring a more consistent and efficient experience for our patrons. This aligns directly with the RLS Task Force recommendation for training and the training being planned for the integration of the Information Desk and Building Operations.

- Identify and implement a software solution that would facilitate cross area and cross shift communication. Etna has been presented as a possible software that could facilitate this as well as provide ready access to a shared knowledge-base and scheduling tools.

- Consider advantages vs. implications of moving toward a “front of house/back of house” model. Staff who deal with the public and staff that deal with processing. Obviously, there is some overlap.

- Find creative solutions to providing access to textbooks in our libraries and via resource sharing, including evaluating the feasibility and desirability of a textbook purchase program for large classes. N.C. State, Kent State and University of Maryland all have programs to provide textbook copies through Course Reserves for their largest courses. Work with Scholarly Communications to focus our efforts on championing the use of Open Access materials, especially for these large classes, while providing for current needs for access to textbooks for reserves.

- Contribute to and participate in Library wide service training for our staff and student staff.
• Continue to explore and assess access vs. ownership questions (purchase on demand vs.
borrow on demand). It is often becoming cheaper & faster to purchase immediate access
to electronic materials (like articles).
• Continue to watch the development of electronic resources and find ways to provide more
consistent access to electronic resources via resource sharing, specifically e-books. (Occam’s
Reader has potential for e-book borrowing/lending via ILL. Libraries need to continue to
advocate for e-resource licensing that permits ILL)
• Centralized call management for Libraries - Access Services is well positioned as a 24/5
service provider to help support this as a collaborative effort across the organization. Ohio
State University Libraries system might serve as a useful benchmark.
• Explore feasibility of purchase process for UM patron requested items found to be missing -
Stacks Management and ILL to collaborate.
• Many of the recommendations we are making will impact all Access Services staff jobs and
will add emphasis to the need to re-describe positions and the required skills and
responsibilities. As much as is possible we should standardize the format and language of
form 30 job descriptions within Access Services. The standardization of Form 30 Job
descriptions across Access Services is desirable on many levels. First and foremost,
providing clarity, consistency and equity for AS staff within the various grade levels can help
to improve a sense of team membership and a clearer understanding of the roles,
responsibilities and mission that are shared across all positions and those that are specific
to each position within each department. In addition, creating job descriptions that
communicate that cross functional work within AS at equivalent grade levels is an
expectation and not an exception captures the changing nature of our work and provides a
degree of flexibility for both the staff member and for managers in responding to shifting
demands and the changing nature of library work. While acknowledging that cross
functional support is vital to the success of Access Services and the Libraries, we also hope
that standardizing job descriptions will help to clearly identify and give recognition to each
individual’s areas of specialization and expertise throughout Access Services to better
capture the unique and vital roles each person serves within the organization.
Understanding that close cooperation and consultation with the Library and campus
administration are needed to achieve this goal we recommend that managers work to
create AS job descriptions that address three aspects of each job consistently:
  o A brief description of the specific and specialized role of the position with a department
    within the first three bullets of the form
  o Examples of the level of responsibility, decision making authority, and leadership
    expectations that are required for the position. (As much as is possible, these
    statements should use common language for these things across all form 30s within a
given classification within AS.)
• A common set of Access Services goals and service expectations and a common set of
  library goals and expectations, including the Libraries’ mission statement for all form 30s
  regardless of level

ACCESS SERVICES WORKFLOW REVIEW TASK FORCE CHARGE
(Approved by SMG August 13, 2014)

Background:
The UMass Amherst Libraries Access Services Department includes Circulation and Billing,
Course Reserves (streaming, electronic, print and media materials), Stacks Management and
Interlibrary Loan/Document Delivery Services. These functional areas support both internal
library processes and external patron needs focusing on access to materials and collection
maintenance. At the core of these activities is a focus on responsive and timely customer
service to both constituent groups, in person and virtually.

With the merging of functional areas (circulation and reserve services), the loss of several staff
positions, the maintenance of a 24/5 service model and the shift to a collection model that
favors digital materials, it is time to reexamine the way this area actively engages with users,
provides service, shares tasks and schedules and trains staff in order to provide a relevant,
responsive and efficient operation to handle these tasks now and in the future.

Charge:
1. Review the (Updated) Libraries 2013-2015 Three-Year Plan for a firm understanding of
how Access Services contribute to its success.
2. Review current staff positions and schedules. Outline recommendations to update and
standardize paraprofessional job descriptions in Access Services to enable greater
flexibility across functional boundaries.
3. Conduct an environmental scan of Access Services Departments at peer institutions with
similar collection size, consortial relationships, hours and volume of work. Examine
collaborative staffing models and levels, duties, and responsibilities at these peer
libraries. Examine alternative service models and articulate best practices in Library
customer service environments.
4. Examine the intersection of the work of Access Services units with other library
departments such as IRM, Scholarly Communications, Business Office and others. Gather
feedback and look for ways to enhance and streamline the work between Access Services
and other areas of the libraries.
5. Recommend changes to workflow, staffing and scheduling models and tools to increase efficiency and improve service, while making the best use of staff, positions and talents. Describe new staff positions to address gaps if needed.

6. Identify tools, technologies, skill sets and training necessary to support the recommendations.

Submit a written report to the Director of Libraries by December 31st, 2014 that summarizes progress of the group and the initial findings and implications of the Task Force with a final report to Senior Management Group by May 1, 2015

Membership:

- Kathryn Leigh, Head, Access Services (Chair)
- Samantha Lariviere, Interlibrary Loan/Document Delivery Librarian
- Thomas Paige, Manager of Circulation Services
- Gabe Stetson, Coordinator of Digital Curriculum, Reserves and Media
- Marcia Burkavage, Reserves
- Michael James, ILL/DD
- Michael Magrath, Stacks
- Mary Yokubaitis, Circulation/Billing
- Jim Borkowski. Science and Engineering Library Representative

Meetings:

Biweekly or as needed at the call of the Chair or the request of the Director of Libraries. Because of the nature of the task force work, meetings are closed. Other staff may be asked to join meetings when their specialized feedback or knowledge is needed.

Information Sharing:

Hold regular meetings and discussions about the work of the Task Force with all Access Services staff. Maintain brief minutes of each meeting and publish them on LibWire. Provide additional information to the Director of Libraries as requested.
Digital Strategies Group
Strategic Plan
Implementation Task Force
Final Report

March 2015
v 3.3
Executive Summary.......................................................................................................................... 1
Background ........................................................................................................................................... 3
Context.................................................................................................................................................. 3
Charge.................................................................................................................................................. 4
Challenges ............................................................................................................................................ 5
Methodology .......................................................................................................................................... 6
Cultural Emphases................................................................................................................................. 7
Culture of Communication..................................................................................................................... 7
Culture of Flexibility............................................................................................................................ 8
Culture of Willingness.......................................................................................................................... 9
Recommendations ................................................................................................................................. 9
Active and strategic planning of professional development................................................................. 9
Broadening job descriptions to emphasize levels of responsibilities, skills, and core duties.............. 10
Develop a formal marketing plan that promotes library services to the campus community ............. 11
Establish a viable Digital Scholarship and Consultation Services program headed by a DSCS Coordinator ........................................................................................................................................ 12
Redefine liaison work to emphasize new and emerging scholarly research processes......................... 13
Provide additional support for research data management................................................................. 14
Create a group of free-floating metadata creators to work on various projects .................................... 16
Increase specialization for metadata consulting and coordination...................................................... 16
Strengthen the Library Systems department...................................................................................... 18
Strengthen the Assessment Department............................................................................................. 19
Create a mechanism to continue the broader types of discussions held by the group ..................... 20
Resource Allocation............................................................................................................................. 21
Sources .................................................................................................................................................. 24
Executive Summary

In 2012, the Digital Strategies Group (DSG) of the University Libraries developed a Strategic Three Year Plan to describe the types of services to be offered by the Libraries in the near future. The DSG formed a Strategic Plan Implementation Task Force (DSGSPITF) and charged it with developing a plan to bring the production and curation of unique and local digital content into the mainstream workflow of the Libraries.

In its meetings the Task Force discussed the plan and potential challenges to the Libraries at length, interviewed unit representatives from throughout the Libraries, solicited comments from staff members, and reviewed literature on similar efforts.

The DSGSPITF developed a series of specific recommendations to achieve the goals of the DSG Strategic Three Year Plan. In order to make this effort sustainable, there are several cultural emphases that must form the scaffolding underlying our future activities:

- Strengthen our culture of communication
- Foster a culture of flexibility
- Generate a culture of willingness

The DSGSPITF recommends the following specific actions to support the transformation of our work from a system built around the handling and processing of print materials to one that can easily ingest, organize, create and curate digital materials.

- Active and strategic planning of professional development.
- Broadening job descriptions emphasize levels of responsibilities, skills, and core duties to allow greater flexibility.
- Developing a formal marketing plan that promotes library services to the campus community.
- Establishing a viable Digital Scholarship and Consultation Services program headed by a DSCS Coordinator.
- Redefining liaison work to emphasize new and emerging scholarly research processes.
- Providing additional support for research data management.
- Creating a group of free-floating metadata creators to work on various projects as required.
- Increasing specialization for metadata consulting and coordination.
- Strengthening the Library Systems department to increase that department’s ability to respond to demands of the Digital Strategies Strategic Plan.
- Strengthening the Assessment Department to support and develop the gathering
and interpretation of data at the unit level.

- Creating a mechanism to continue the broader types of discussions held by the group.

Several of these recommendations are for new positions, though there will be no additional resources made available for their creation and staffing. The DSGSPI TF sees three possible ways to find personnel to perform the tasks recommended:

- Backfill behind vacant positions
- Redesign existing positions
- Reassign personnel into newly created positions
Background

Context
It is clear that digital materials have replaced print materials as the predominant medium for scholarship in academic research libraries. For libraries responding to the needs and wants of users this means increasing the emphasis on digital materials while deemphasizing print materials. Currently the University Libraries is in the process of making this transition. We still commit resources to the acquisition, processing and handling of print materials, but we are redirecting much of our new acquisitions funds to electronic materials and are planning to move a large portion of print materials currently housed on campus to off-site storage facilities. When that process has been completed, nearly all Libraries’ efforts will be geared toward acquiring, maintaining, and providing access to digital materials. Ultimately this will affect all units and all staff members of the University Libraries.

Part of the transition to digital materials includes an increased emphasis on collections built by scholars and researchers to support their academic endeavors. These collections are considered increasingly important because they contain materials that are not available anywhere else. Over the last decade the University Libraries has gradually increased its ability to incorporate these unique and local digital materials into its collections as best it can. In some cases the Libraries created new departments to work with these materials and in other cases existing departments have built new workflows or modified existing ones to acquire and produce digital materials. Rather than creating one overarching department to work with these materials the Libraries has approached these resources on a departmental level. This approach has worked well enough, but there has been no concerted effort to establish a uniformity of metadata standards or discovery systems. Each department follows best practices for its own specialty, but there are some differences between them. Other issues such as seamless discoverability and digital preservation are examples of issues that are difficult to address at a departmental level because of scope and cost.

In order to ensure that these types of issues were approached from the institutional level, the Director of Libraries formed the Digital Strategies Group. Comprised of the heads of the various units involved in this process, DSG was able to strategize and plan the next steps for the Libraries with regards to the unique and local content. DSG created three sub-groups to examine various aspects of digital materials:

- the Metadata Working Group (MWG)
- the Digital Creation and Preservation Working Group (DCPWG)
- the Data Working Group (DWG)

All three of these committees were made up of individuals representing the departments working with unique and local digital materials. These groups and the DSG produced a strategic plan in 2012 outlining a strategy for incorporating the collection and maintenance of unique and local content into
the day-to-day workflow of the University Libraries. The plan calls for increasing assistance for faculty projects and increasing ability to use library personnel to bring these unique and local digital materials into the Libraries’ collections.

With the objective of initiating consultation services and eventually offering infrastructural support to faculty members for their digital projects, the DSG began working towards its goals as outlined in its Strategic Plan:

- Working Group members developed educational programs to introduce the staff of the Libraries to different aspects of working with unique digital materials.
- The DSG developed the Digital Scholarship and Consultation Services (DSCS) program which took requests for project assistance from faculty members and found Libraries staff members who could consult on the project and provide expertise in certain areas.

The DSG and the Working Groups noted many challenges in the implementation of the strategic plan. The DSG decided to charge a Task Force to explore these challenges and suggest ways to efficiently allocate existing resources to achieve the goals set forth in the Digital Strategies Strategic Plan.
Charge

The Digital Strategies Group Strategic Plan Implementation Task Force (DSGSPITF) is conceived as a term-limited (18 month) task force made up of representatives from the Working Groups, the Digital Strategies Group and other units within the Libraries. This task force will collaborate with other units in the library to articulate a plan for adapting current workflows to accommodate new digital collections and services and to implement that plan. Specific objectives include:

- evaluating the intersection between digital projects (short- and long-term) and staff positions
- identifying short-term budgetary resources to support Working Group educational and consultative activities;
- making long-term budgetary and personnel resource allocation projections and recommendations to the Director of Libraries based on the priorities of the Digital Strategies Group.

Organizational documents such as the Libraries’ Three Year Plan and the Digital Strategies Group Strategic Plan 2012-2015 will inform and direct the task force’s recommendations. The task force’s summary report will be communicated to SMG through the Digital Strategies Group.

- Membership
  - Jessica Adamick representing the Metadata Working Group
  - Meghan Bergin representing the Digital Creation & Preservation Working Group and Information Resources Management (replacing Gary Hough, retired)
  - Marilyn Billings representing Scholarly Communications
  - Beth Lang representing Research and Liaison Services
  - Kathy Leigh representing Access Services
  - Aaron Rubinstein representing Special Collections & University Archives
  - Jay Schafer representing University Libraries Administration
  - Maxine Schmidt representing the Data Working Group (replacing Rebecca Reznik-Zellen, resigned)
  - Brian Shelburne, chair, representing the Digital Strategies Group
Challenges

Building collections of this nature is a costly and elaborate process and requires coordinated efforts across departments in order to make the most economical and effective use of resources, particularly when there is no one department responsible for the direction or coordination of these efforts. A decentralized approach is a key element of the strategic plan that shaped the approach of the Implementation Task Force. These efforts must be decentralized and not lodged in one specific place within the organization, e.g., a Digital Library Program.

Within the Libraries’ current organizational structure it will not be easy to to achieve the goals of the DSG using resources as they are currently managed. The work will require crossing departmental boundaries, and projects will require contributions from individuals based in different areas of the Libraries. By spreading the operations across the Libraries’ existing departments, employees acquire skills necessary to work with digital materials as we move farther from a print-centric environment. By training staff members to create and manage these types of materials, the Libraries will build a foundation on which the conversion from print to digital can grow.

The Digital Strategies Group and its Working Groups are examples of groups that have been formed outside of the Libraries’ formal organizational structure to perform tasks that are not easily accommodated within the formal structure as it currently exists. The work of these groups is extremely important and necessary for the Libraries to achieve their published goals. The members of these groups are charged with answering significant questions posed by working with new materials and addressing the challenges that these materials created for the Libraries, yet membership in these groups did not initially appear on any job description. The work that the members contribute is outside of their regular duties, and that work can be time consuming.

Sitting outside the formal hierarchy of the Libraries, these groups have a degree of flexibility that is most desirable. Their membership crosses many unit lines so it is easier for these groups to see the larger picture of an issue or project while at the same time understanding how individual units might be affected by that same issue or project. Typically these groups are able to explore and develop responses to challenges more swiftly. Groups of this nature are recognized as having value in the business world and are described as network groups (as opposed to more formal hierarchy groups).

These groups also face challenges that prevent institutionalization of work with unique digital content.

- Work performed by these groups is seen as outside the scope of many departments within the Libraries, contributing to the sidelining of work on unique digital content.
- Staff may perceive that those involved with the working groups are taking care of the work
and that there is no need to support it.

- A perceived lack of authority of the group.

Even with the strong support of the Libraries' administration the lack of an organizational fixed point within the group leads to the perception that the group is unable to oblige other entities to follow its lead on initiatives. And with no budgetary control or members with assigned duties these groups may find it difficult to shepherd a project through the Libraries' system. Other potential downsides to this type of entity are that the members all have other responsibilities that outweigh the demands of the shadow groups (at least on paper), and that implementing the kinds of projects contemplated by these groups generally will take a significant amount of resources and require the attention of several departments. Coordination of these large projects may be a significant hurdle.

There are some parallels to this form of operational groups in existence within the Libraries. The Assessment Librarian is supported by an advisory committee. While their role is primarily advisory, committee members have assisted the Assessment Librarian in assessment activities. Similarly our website efforts are supported by the existence of two committees. One is an advisory committee that assists the Web Services and Emerging Technologies Librarian with content decisions, and the other takes a more hands-on approach to designing and building the Libraries’ website. In these examples the committees are populated by members from throughout the Libraries, but the leadership of the effort falls to a person who is established in the organizational structure. This model serves as a useful precedent for embedding the “shadow groups” into the formal structure of the Libraries.

To take advantage of the flexibility of a group in the network while utilizing the established groups of the hierarchy, the Libraries should designate some positions as formal contacts for a particular subject or topic (e.g., metadata, digital preservation, copyright, etc.). Those positions will serve as contact points to the formal hierarchy of the organization. The more informal aspects of the group may be created by the populating the groups with members from across the organization, though it is critical to note this responsibility in their job description.

**Methodology**

The membership of the Task Force included representatives from all of the departments that were expected to play a role in the creation and incorporation of unique and local content. The work of the Task Force consisted of four primary approaches:

- The group conducted lengthy and detailed discussions about the future of the Libraries, engaging in frank conversations about possibilities for transforming the workflows of existing units to accommodate the new types of digital materials. These discussions provided opportunities to debate sometimes radical revisions of the organizational structure of the Libraries. The group recognized that a reorganization was outside of its charge, discussions of the possibilities could produce ideas that could be implemented within the current
● The Task Force interviewed representatives from nearly all units in the Libraries to gain a better understanding of their relationship to the materials and processes under discussion. Early in the meetings many in the group realized that a more detailed knowledge of the different units’ responsibilities was critical to know how those units may or may not interact with unique digital materials. The interviews were largely informational and allowed Task Force members the opportunity to ask questions of the unit representatives concerning their day-to-day operations and their views on the evolution of their units into a more digitally-based office.

● The Task Force reviewed contemporary literature on change in academic library environments. Change and transformation have been popular themes in recent articles and conferences, and the group read a variety of those materials. The group examined job postings to get a sense of what new types of positions were being created to work in a digital environment, and discussed how those positions might be incorporated into the structure of the Libraries. The Task Force examined web sites and publications of other institutions that outlined revisions and reorganizations to their structures and discussed how similar changes would be applied to the University Libraries.

● Task Force members asked their units for input. The broad question of “What are we not doing well?” was posed to the staff and responses were brought back to the group for discussion. Those responses were compared against the five goals expressed in the Digital Strategies Strategic Plan and were more broadly categorized into thematic categories. The examination of those responses helped frame many of the recommendations made in this document.

**Cultural Emphases**

In addition to the specific recommendations detailed below, the Task Force noted larger issues that were critical to successfully developing the vision outlined in the Digital Strategies Strategic Plan. These issues are not specific to individual departments working with digital materials, nor are they unique to this institution. These themes are common in the current literature of transformation. In order to fully develop the capabilities envisioned by the Digital Strategies Strategic Plan, these ideas need to be infused throughout the organization.
Culture of Communication

If the Libraries are to have any degree of sustained success implementing the recommendations in this report, a culture of communication must be maintained - and nurtured throughout the organization. The importance of effective communication cannot be understated.

The Libraries are in need of a practical vision statement that outlines our mission in a way that is understandable to every library employee and that allows every employee to see how their individual and departmental efforts contribute to the success of meeting this goal. Additionally, as we continue to adapt, transform and create new approaches to our work and services:

- Employees need to know exactly what is expected of them as their responsibilities change.
- Employees must be able to voice any concerns or ideas to supervisors or administrators and know that their thoughts will be heard and considered.
- Different units in the Libraries must talk to each other regularly and routinely to ensure that there is minimal duplication of effort and to work together across organizational boundaries whenever efficiencies and economies of effort can be realized.
- Initiatives and goals must be communicated to all so that any staff member at any level has an opportunity to recognize unrealized connection points between projects and establish links between them.

While we currently have many ways that we communicate with and amongst staff, it would be beneficial to solicit ideas on how to do this more effectively. It is also worth restating that sharing information should be done multiple times and in multiple ways to be sure that the information is received in a way and at a time when it can be received.

Culture of Flexibility

Fostering a culture of flexibility in the organization is a second necessary environmental shift to realize the goals of the Digital Strategies Strategic Plan. By developing and maintaining an ability and an expectation that staff and departments will be flexible and creative in their approach to the work at hand, the Libraries will be better prepared to develop new workflows and to engage with new types of materials as responsibilities shift.

As with communication, it is critical that the culture of flexibility permeate the entire organization.

- Every unit and every individual must share this willingness willing to try new things and try old things in new ways.
- Cross-training in a variety of departmental or library functions at appropriate grade levels and placing emphasis on departmental or library-wide teamwork to accomplish a particular task or to keep a particular workflow moving, must become a routine and established expectation for staff at all levels.
- Managers must foster, plan for, and document the cross-training of staff and help to direct them to the most appropriate tasks based on daily, weekly or project based priorities.
• Managers and staff should respond to and expect that workloads associated with the academic calendar will ebb-and-flow and be willing to work cooperatively with other areas that may have a higher demand at a particular time.

• Library administration should show flexibility by supporting new ideas that are sometimes experimental (and therefore have some risk attached to them) by supporting ample training opportunities for staff, and by promoting the recommendations in this document.

• In addition, the administration should take the lead in finding creative incentives within the confines of union and university guidelines for staff members to participate in any organizational changes.

**Culture of Willingness**

The third critical element to enable the transformation of our services is to foster and sustain a culture of willingness within the Libraries.

• New efforts and endeavors should be explained and discussed within the context of our larger service goals.

• Opportunities for staff to take on new responsibilities and learn new skills to generate more variety in the workplace must become more commonplace and more frequent.

• Staff and departments should collaborate regularly to work and attain goals in new and creative ways depending on the desired outcome and the need for particular talents, tools and experience which may reside in various areas within the Libraries.

• Library administrators and staff must commit to a regular examination of recrafted and redescribed job descriptions and be willing to accept a certain level of ambiguity and uncertainty as new job descriptions are evaluated within the context of an antiquated state classification system. Staff should rest assured that the Libraries strongly support the maintenance of accurate and up-to-date Form 30s even within this time of rapid change and that they are prepared to accept changes to grade levels that may shake up the current distribution and structure of job duties within a department or area.

• Those tasked with planning, supporting and executing these new initiatives should approach them with an attitude that recognizes potential difficulties as challenges rather than obstacles and should look to colleagues for help in solving them.

**Recommendations**

The following recommendations by the DSGSPITF are the result of the discussions of the group informed by interviews with unit representatives and by solicitations of areas for improvement from the staff of the University Libraries. These recommendations are not listed in order of importance or priority. The priorities are the cultural emphases of communication, flexibility, and willingness. All of the recommendations work in concert to achieve the goals described in the DSG Strategic Plan.
In several instances units within the Libraries have already begun self-examination processes and have reached similar conclusions on their own. Recently the Liaisons program and the Information Resources Management department have conducted examinations and published recommendations mirroring those found here. Despite this fact, it is believed that it is worth repeating those conclusions in this context to emphasize their importance.

- **The DSGSPITF recommends active and strategic planning of professional development.**

As the Libraries prioritize development of digital content, staff training that develops and enhances skills and knowledge of working with digital content becomes essential. The Libraries must foster an environment for learning in which support for on the job skill-building and knowledge acquisition is guaranteed and where employees that acquire new skills are encouraged to share their knowledge.

Part of this process will be to develop a plan to transition current print-related tasks to digital-related tasks. There will be an expectation that all staff members will develop new skills to work with digital materials. It is a priority of the Libraries to help staff members develop those skills. The Libraries want no staff member to feel marginalized or forgotten as a result of this process. The Libraries intend to support all staff members as positions and responsibilities change. All staff will play a role in the processing of digital materials, and the Libraries will ensure that staff are trained in new skills and tasks and will allow staff time to learn to work with the new materials.

In addition to providing training the Libraries must support the sustained effort for staff to get repeated practice with these new skills. Without consistent practice and reinforcement of the training it is likely that the staff will not retain the information they learn. Supervisors and managers of staff learning new skills must understand that staff participation in the digital projects is considered a vital part of the Libraries’ work, and any contributing staff members in their units must be given time to complete assigned tasks.

- **The DSGSPITF recommends broadening job descriptions to emphasize levels of responsibilities, skills, and core duties to allow greater flexibility.**
Most Libraries’ job descriptions outline a series of tasks that make up the core duties within that position. Typically the position is defined by that finite group of tasks, and the descriptions of the tasks are quite specific, leaving little room for flexibility. Currently there are instances of job descriptions that are a series of disparate assignments brought together in what seems to be a haphazard way. These positions are generally products of necessity, evolving organically for a wide variety of reasons. The restrictions created by positions that are too tightly defined or haphazardly constructed can limit how job descriptions support the Libraries’ strategic plan and can limit the Libraries’ ability to respond to changing needs of users. In addition, the job descriptions can be limiting to staff who wish to increase the variety within their jobs and to supervisors who would like to assign different tasks to their staff members. We wish to generate a culture of flexibility in the Libraries, and one of the cornerstones for this must be in the way positions are described.

A new approach to the way positions are structured and described would be to broaden the focus of the description to emphasize the skills and levels of responsibility required to perform the job while limiting the specificity of the tasks of the position to only the major assigned areas or functions overseen. By de-emphasizing the specific duties we will begin to build the potential for variety and flexibility into the organization. Staff with a certain range of skills will be able to work a variety of tasks that require elements from that particular skill set. Core responsibilities and the level of decision making expected of their position will continue to be defined within their job description, but not nearly as extensively as in the past. Without the precise task definitions staff may be assigned a broader range of duties without concern that they are outside the scope of the job description.

This shift from a focus on precise listings of tasks of the position to skills and responsibilities-based descriptions and positions must be done, of course, within all guidelines and regulations established by the Commonwealth and by the different unions representing the employees. It will also become critical to review and revise job descriptions on a regular basis to ensure that the skills required for a certain position remain relevant.

- **The DSGSPITF recommends developing a formal marketing plan that promotes library services to the campus community.**

The current Development and Communication Department of the University Libraries does a wonderful job of telling our story and promoting our value to the world outside of the campus community. UMass alumni, community members, and potential benefactors are able to see who we are and get a sense of our goals and achievements through the creation of attractive and informative documents, strategic release of information, and planned events. The Libraries’ marketing efforts to an off-campus audience are well honed, but our on-campus marketing is somewhat irregular.
While it is important that we push our message out to the off-campus audience for the purposes of fundraising and public relations, it is equally critical that we employ a similar approach to spread information about library resources and services to the campus community. We have no formal entity within the Libraries tasked with planning, coordinating, and executing marketing efforts geared to the campus. There are limited coordinated efforts to promote our services to the campus at large, but they generally consist of information on the Libraries website or printed brochures that are handed out to new students and faculty. Responsibility for publicizing a resource or a service generally falls to that department offering it, and the capabilities of departments to market services vary significantly from unit to unit. Some units are capable of marketing their services most effectively, relying on printed materials, website updates, and social media to push their message outwards. Other units are not as aggressive about marketing service, rely on mechanisms such as word of mouth, the liaisons, or the printed brochures to spread word of their services or hope to be included in lists of services compiled by other entities in the Libraries.

Our website is another means of advertising our resources and services, and it is a critical component of any marketing that we may do. It is a passive approach, however. We rely on others to approach us in order to learn about our offerings. It is a similar approach to that of a service desk. A vast amount of information is available, but we are relying on patrons to approach us. As we expand our capabilities to work with the unique and local digital content, we must develop a better means to project our message to the campus community and let them know what we offer.

There are a variety of ways in which we might accomplish this, and there are already efforts underway to achieve this goal. The Libraries has created a marketing workgroup charged with gathering background information to inform a marketing plan. The findings of that group will play a significant role in the direction of the Libraries' future marketing efforts.

- **The DSGSPITF recommends establishing a viable Digital Scholarship and Consultation Services program headed by a DSCS Coordinator.**

Goal 4 of the Digital Strategies Group Strategic Plan is to "provide support to the university community in the creation and management of digital content." The primary way that goal can be achieved is to establish and support the Digital Scholarship Consultation Services (DSCS) that has now become inactive. It is critical that the Libraries revitalize the effort to build and expand the consultation service.

Prior to the creation of the DSGSPITF, the DSG planned and offered Digital Scholarship Consultation Services to faculty members. The goal was to offer advice and to educate faculty members in the process of managing digital projects and to offer any reasonable amount of support given the
Libraries' ability to provide resources. At that time there was a Digital Strategies Coordinator in place, and the person in that position served as the hub for the DSCS service, fielding inquiries and connecting patrons with Libraries employees best suited to provide assistance. The Coordinator was supported by the various working groups created by the DSG, and many of the consultations involved members of those working groups. When the Coordinator left the Libraries in 2013, the position was not filled. Without a central figure tasked to carry the project forward, the DSCS effort languished.

With the accelerated growth of digital projects produced by faculty and students support for digital projects is already a significant unmet need on campus, and that need grows rapidly with each semester. The Digital Humanities movement is in its nascent stages, and we have already fielded requests for project support in that area. Data management plans are now mandated by major granting entities, and the university recognized the importance of data management by charging a university wide task force to examine the logistics of providing support for research data. As the Libraries redesigns itself to respond to changing patron needs it is essential that it finds a way to plan to support these projects.

Any effort to reinvigorate the DSCS program must include two elements; a coordinator to serve as a project manager for these projects and a well-defined process to channel projects to appropriate staff members for their contribution with the understanding that this work is part of their assigned duties. The previous Coordinator position was based in the Library Systems department. While the nature of the work requires the Coordinator to have close contact with Systems, there is a strong outreach component of the position that is an awkward fit for that department. A recrafted Coordinator position should be located in a department that enjoys more direct contact with the faculty.

A significant challenge to overcome is the question of responsibility for contributing to the DSCS effort. Of those participating in the various DSCS projects, only the Digital Strategies Coordinator was specifically tasked with these duties. The Coordinator performed a large quantity of the work, relying on assistance from others in the Metadata, Data, and Digital Creation and Preservation Working Groups, all of whom were providing work that lay outside their job descriptions. As a result the amount of effort that could be contributed by working group members was limited by their other duties. In a reconstituted DSCS effort job descriptions of library employees who support these projects should reflect this, and supervisors of people in these positions must support their supervisees in these efforts.

One question that arises around the DSCS program is why have a specific program for these activities when we are actively eschewing a centralized approach to incorporating these types of tasks into the Libraries’ regular work. The first reason is to present a public point of contact for library users. Most
patrons who approach the Libraries for assistance with this sort of project are looking for some point through which they can approach appropriate staff for help. Without a single contact point such as the DSCS, patrons would likely have a more difficult time finding the appropriate person or persons. The patron may spend significant time hunting for someone who knows how to help, or even worse, abandon the pursuit for help altogether.

The second reason is that continuing the DSCS as a program allows some transition time to get to that state where this type of work is performed seamlessly across the organization. It is our goal that a patron will be able to approach any staff person with questions about digital support and be directed to the correct staff member immediately. It will take the Libraries some time to achieve that goal, though. In the interim the DSCS will serve as an access point as we work to achieve our goal.

- **The DSGSPITF recommends redefining liaison work to emphasize new and emerging scholarly research processes**

Traditionally liaisons serve as a link between assigned academic departments and the Libraries. They often specialize in a particular academic subject and assist faculty and students with research questions in that subject. While this element is still a vital role of the liaison, the concept and responsibilities of the liaison must be broadened in order to respond to changing needs of patrons and to other units in the Libraries. The new liaison is an expert in any area of the entire academic enterprise who actively teaches, consults, and collaborates with campus constituents.

To support work with unique and digital content, liaisons must serve as library marketers. Liaisons must be able to network effectively, understand the changing needs of users, and adapt themselves to new approaches. They must understand the services offered by the Libraries well enough to connect the user with the appropriate service or staff person within the Libraries. Liaisons must be aggressive in pursuing opportunities to support the Libraries’ digital service efforts. The liaison role must be clear to both library staff and campus communities, and to that end, DSGSPITF recommends reviewing the term “liaison”; the library should explore alternate terms that more directly convey the nature of the relationship between library staff, library services, and patrons. DSGSPITF suggests working with the Libraries’ Development and Communication Office or the Isenberg School of Management to develop a branding strategy.
Academic departmental liaisons should no longer be solely defined by academic subject expertise. Much of the knowledge sought by faculty and students does not fall under the academic subject of their project. Faculty and student projects can encompass a wide range of related topics such as technologies, data management, theories of learning, instructional design, copyright, and more. The Liaison Council has held a series of retreats to examine its mission, and the Council recently expanded to include library staff with expertise in these areas. The Liaison Advisory Committee has recently developed a new charge for the Liaison Council that formalizes this. The new charge, titled “The UMass Amherst Libraries Librarian Engagement Program,” is an excellent start at addressing some of the suggestions offered in this report. All internal and external language about the Liaison program should be updated to include staff who hold disciplinary knowledge as well as staff who are experts in new and developing areas of the scholarly research process. The expansion of the program should be emphasized, with particular attention to the staff who are newly involved.

The academic departmental liaisons are a critical element of the plan to incorporate the production of unique and local content into the regular workflow of the Libraries. A liaison has many contacts with faculty and staff in their assigned academic departments and should use these contacts to actively seek possible collections, and to connect their owners or managers with Libraries units who can move forward with the acquisition process.

Following a series of retreats in the summer of 2014, the Libraries’ Liaisons program has begun a self-examination process dedicated to exploring the issues outlined above. The newly-formed Liaisons Advisory Committee has drafted a document redefining the traditional liaison role. As of this writing that document is in its final revision stages, but it may be found on the Libraries’ intranet. A reference to the document is included in the “Sources” section at the end of this document.

- **The DSGSPITF recommends providing additional support for research data management**

As a large research institution with a Carnegie Foundation classification of “very high research activity”, UMass faculty, staff, graduate students, and some undergraduate students have the highest research data support needs of any type of higher education institution. Research data is a core component of the unique and local content that the Libraries should prioritize. Research data produced by UMass Amherst researchers is the product of a large public investment in research, and it should be managed and shared as appropriate.

Recently, the UMass Faculty Senate Task Force on Research Data Infrastructure called for an
institution-wise strategy for effective data management, citing such a strategy as critical for long-term success of the University research mission. A report from the Task Force explains that individuals and units on

campus have had to develop local solutions for data management, and specifically identifies the Library as the natural home for collaborative data management services: “Given its extensive experience with selection, metadata, collections, institutional repositories, preservation, curation and access, the Library is the most appropriate existing institution on campus for safe, sustained, and trusted stewardship of research data”. The Task Force recommended that the Libraries take the lead role in a collaboration between the Office of Research and Engagement, Information Technologies, and the Schools and Colleges to create a “virtual portal that aggregates the public access to scholarly products, provides controlled access for sensitive data, implements a research data archive, and provides access to data beyond the campus with verified provenance”.

To be able to lead in data management, the Libraries need to encourage and train current staff to work on data management, and hire dedicated, trained data management staff. The Libraries’ support of research is currently centered on one part of the research lifecycle: the identification of information, data, or resources. While there is support of knowledge dissemination through the Scholarly Communication Office, some liaison activities, IRM support of ScholarWorks, and SCUA, the Libraries need to increase practice of existing data management services and create new services that support all parts of the research lifecycle, which includes creation and management of research data. The Libraries have developed services to support data management over the past five years, staffed by the Data Working Group (DWG). The DWG consists of staff that represent Scholarly Communication, Systems, Liaisons, and Digital Strategies, Library Systems, and SCUA, and reviews data management plans; offers workshops and instruction on data management and data management plans to faculty and graduate students; and consults on metadata and standards for data format and content, policies for datasharing and accessibility, and plans for long-term access to data sets. The DWG works directly with faculty and students, and received inquiries and consultation requests through the Digital Scholarship & Consultation Services model when it was active. DSGSPITF recommends that the DWG continue its work and relationship with DSCS for the short term, but expects that broader library support of data management over the next couple years will solve the need for the DWG.

Broader library support of data management should develop. Library leadership should support and encourage departmental liaisons, liaisons with technical knowledge, and IRM staff in the development of data management knowledge and skills, which may include knowledge of organization and description, data literacy, storage, preservation, access, and re-use. Many subject librarians/liaisons now teach courses instructing students on the use of academic databases to discover the Libraries’ resources, and DSGSPITF would like to see courses taught that focus on additional aspects of the research lifecycle. For example, courses could focus on aspects of data
management such as optimizing data for long-term preservation, adding metadata to ensure discovery, versioning, file-naming best practices, and dissemination guidelines. We take it as a given that students and faculty need instruction and support to identify primary sources or scientific literature, and it should also be taken as a given that we need to support management of data and knowledge. This requires hiring and training librarians and staff.

In a DSCS model, some highly trained dedicated staff would consult on data management and other staff would support data management needs. For example, a data management specialist and subject librarian would consult on the development of discipline-specific metadata that would best enable discovery of research data. At a minimum, a data specialist should be hired to support research data management needs across disciplines and coordinate services related to the portal recommended in the UMass Faculty Senate Task Force on Research Data Infrastructure report. The data management specialist would work with any additional staff required to run the data management portal. After the campus develops the technical infrastructure required for data management, DSGSPITF recommends reviewing any additional needs for library-based data management services and associated staffing levels.

- **The DSGSPITF recommends the creation of a group of free-floating metadata creators to work on various projects as required.**
- **The DSGSPITF recommends increasing specialization for metadata consulting and coordination.**

As campus and Libraries departments produce increased amounts of the unique and local digital materials, the amount of metadata that will be required will increase dramatically. Currently the primary library departments that produce these materials are seeing their metadata creation needs increase significantly. If the amount of materials requiring attention continues to increase and our organization does not respond, the departments may not be able to keep up with demand. The Libraries require an increase in the volume of materials processed and the efficiency of the means by which they are processed. These increases will in turn lead to an increase in the volume of materials the Libraries is able to produce.

The Libraries are currently experiencing a steady decline in the amount of cataloging required to process its print collections. We are acquiring less print materials and most that we purchase come with records that are ready to be ingested into the catalog directly, requiring little modification on our part. Items that do not come with records are generally cataloged using records created...
elsewhere and copied into our system, also with little modification. Very few items require original cataloging.

The digital or digitized unique and local items are a different story. Nearly all the items included in our local databases for these types of materials require the creation of metadata. The complexity of the metadata varies depending on the level of required description and the metadata standard used in the different collections, but in all cases significant effort is put toward data creation. In most cases the output of the departments generating these resources is limited only by the number of people working to create the data records.

The Special Collections and University Archives conducted an experimental project to determine if library staff with varying degrees of cataloging experience could provide metadata creation support for a project digitizing unique and local content. The University Photos Project (UPP) demonstrated that staff members trained to process or catalog bibliographic materials could successfully transition to metadata creation for digital objects. Building on the lessons learned from the UPP the Libraries can create a group of positions whose responsibilities would be to serve as metadata creators.

This group, informally known as the Metadata Pool in DSGSPITF discussions, would be assigned wherever metadata creation assistance is required. The members of this group would be trained in different metadata standards to work on the various materials produced by library departments creating our unique and local digital content. Members of the Metadata Pool might consist of current employees willing to undertake this kind of work as well as term-limited employees such as library residents. Current employees who work in the Pool would certainly find this work a means to further develop their skill set and could conceivably become eligible for potential advancement.

The precise workings and structure of the Metadata Pool can be determined as the group becomes a reality, but a logical organizational location for the group would be in the Bibliographic Access and Metadata Unit (BAMU) within IRM. BAMU would serve as a coordinator for the Pool and would act as the administrative link for it. The units for whom the Pool was working would supervise the specific project work directly. One of the strengths of this approach is that it allows for maximum flexibility and adaptability as the Pool members work in a variety of departments within the Libraries.

The Metadata Pool can also help demonstrate where this kind of work is needed most on a regular basis and eventually help the Libraries adjust department sizes so that they can perform the tasks expected of them. If some departments perpetually scramble to meet patrons’ needs or keep up with materials workloads and request assistance from the Metadata Pool on a regular basis, then they
possibly need an increase in unit members. If other units regularly seek new projects to occupy regular team members and rarely request assistance from the Metadata Pool, then those units may have a surplus of available staff time. The Libraries may wish to survey all of its units for either of these scenarios and identify units that have either too many or too few workers available. If a determination is made that some units have a surplus and others have a deficit of available staff time one possible solution is to redistribute the available labor pool. Additional positions could be assigned to the underpowered areas and overtime those areas will grow to appropriate strength.

Currently the Libraries create metadata primarily using five different metadata standards. Each department determines which standard is most appropriate for the materials it produces, and there is minimal coordination between the different units concerning metadata creation or curation. In order to establish some uniformity to the metadata generated in the Libraries the DSG formed the Metadata Working Group (MWG) and charged it to “provide direction for, and coordination of, metadata creation and management with the goal of interoperability. Develop appropriate guidelines and documentation for shared metadata in the libraries.”

The MWG operated as one of the “shadow groups” (see Shadow Library section below) and was active in assessing the Libraries’ metadata practices and recommending actions based on its charge. While it operated efficiently in its efforts, the group faced the same challenges as the other shadow groups. A metadata specialist would serve as the leader for the MWG as it was assigned other projects and could serve as the point where that shadow group intersects with the organizational structure. A specialist would also serve the Digital Scholarship and Consultation Services effort as the library consultant for metadata related matters and serve as a connection point between the different units in the libraries creating metadata.

- The DSGSPITF recommends strengthening the Library Systems department to increase that department’s ability to respond to demands of the Digital Strategies Strategic Plan.

For many years the Library Systems department has responded effectively to the needs of the University Libraries. The department provides support for nearly all electronic efforts inside the Libraries, serving as consultants, technicians, programmers, designers, and instructors for the rest of the staff. With a relatively small staff and with limited resources, Systems has found a way to sustain the Libraries’ transition to digital technologies. The rate of demand on the Systems unit is steadily increasing, and as we look to a future in which more staff are working directly with digital materials it is clear that the demands on the Systems unit will continue to grow at an exponential rate.
The five general goals of the DSG Strategic Plan describe situations that require an increase in the capabilities of the Systems Department. To some extent many of the specific tasks listed to achieve the goals may be accomplished by individual units working their materials or by the reconstituted DSCS program, but ultimately all of these efforts will require infrastructural support from the Systems Department beyond the support that they currently provide. That is not to say that Systems is currently incapable of supporting some efforts in the support of unique and local digital materials.

Library Systems was instrumental in the development of Credo, an online repository for the digital collections of the Special Collections and University Archives unit, using the open source software Fedora. Taken as a whole, though, the volume of anticipated extra assistance would suggest the addition of at least one FTE to the Systems staff to perform the tasks necessary to sustain the ongoing maintenance and development of existing services and infrastructure and also support whatever may be required to achieve the goals of the DSG Strategic Plan.

Due to the varied nature of the potential needs of the Digital Scholarship Consultation Services projects and of the units within the Libraries, it is difficult to precisely predict what kind of positions we require. And we must be prepared for what is necessary today to shift to another focus in a few years. It seems reasonable to seek a person well-versed in the widest possible range of computer skills. The more versatile the person, the more flexibility can be retained in order to support the broadest possible range of issues that may be encountered. Specifically, programming, development, and some digital project management skills are considered highly desirable. It is critical to note that the person in this position need not be a Librarian. It is far more important to find an individual with broad and detailed systems knowledge.

In most of our consultations to date, the person coming to the Libraries for assistance generally has a plan in place and knows what hardware and applications they intend to use. The DSCS has provided more conceptual consulting to date. In order to broaden the scope of the DSCS and take a first step toward a goal of providing infrastructural support to faculty working on digital projects, the Libraries should task a position within the Systems department with full- or half-time responsibilities focused on a more exploratory aspect of digital work than we currently provide. This person in this position would consult with faculty and staff who have ideas for digital projects, and who need assistance in the planning stages those projects as they search for appropriate hardware and software to complete their work. Anecdotal evidence suggests that many faculty members are curious about working with digital projects but do not know how to begin the process and do not know what tools are appropriate for the type of work they wish to accomplish. With someone on library staff who is familiar with many applications and approaches to digital projects these faculty members could consult with someone who can serve as a guide for their initial foray into digital teaching.

This service should also be available to Libraries’ staff and departments should they want it. It is not uncommon for departments to learn of new software that may improve the workflow dramatically. In some cases a department may be able to explore the software on their own to determine its viability,
but in other cases the department may not be able to investigate for any number of reasons. In those cases they would consult with this position to learn more about the application and how it might fit into their procedures.

- **The DSGSPITF recommends strengthening the Assessment Department in order to support and develop the gathering and interpretation of data at the unit level.**

The process of gathering and interpreting specific data is the means to determine the most effective ways to commit library resources. As the university begins to follow a path set out in its new strategic plan and move toward a budgeting model that stresses return on investment and demonstration of value, it is more critical that the Libraries expend resources on collections, services, and facilities for which there is a demonstrable need. It is equally important to show the value of past expenditures by examining data gathered on the use of current resources and services.

There is widespread recognition on the part of librarians that assessment needs to be a larger aspect of all levels of the planning process. In the Libraries’ new Three Year Plan, assessment is recognized as a culture that needs to be emphasized. With regard to the collection and management of unique and local digital materials, assessment can provide data on a wide range of questions that inform the collection policies of the Libraries. Questions concerning the primary users, the types of materials collected, the likely types of materials to be actively used, and the ways in which certain user groups want certain types of materials are all examples of questions that, if answered, will allow the Libraries to respond most effectively to user needs and to make certain these types of resources have the greatest impact.

Currently the University Libraries employ 0.9 FTE dedicated to assessment (one librarian at 80% and another at 10%). The current assessment librarians generally process information to support large scale and library-wide efforts, providing data to the University Libraries and Administration. Many decisions, however, are made at the departmental or unit level that could be better informed by effective data gathering and interpretative techniques. It is unreasonable to expect that an Assessment department would conduct this data gathering and interpretation for all units and projects within the Libraries. It is far preferable and more pragmatic for our assessment professionals to serve in a consultative role, providing support to unit heads or others tasked with gathering data in advance of a larger project.

The addition of one additional FTE assessment librarian would impact our developing culture of assessment. Assessment librarians should work with other library departments and units in a more instructional way, leading librarians through processes of data gathering and interpretation. The Assessment unit should develop a basic method of instruction for the rest of the library so that staff
members are familiar with basic concepts of assessment and basic assessment techniques. For specific projects, Assessment Department librarians should work closely with project leaders to ensure that a project or other fact finding effort incorporates assessment best practices. Assessment librarians should also expand their current role as instructors in the tools the Libraries use to perform gather and analyze data.

The process of gathering and interpreting specific data is increasingly important as a means of determining the most effective ways to commit library resources. As the university begins to follow a path set out in its new strategic plan and move towards a budgeting model that stresses return on investment and demonstration of value, it is more critical that the Libraries expend resources on collections, services, spaces, and facilities for which there is a demonstrable need. It is equally important to show the value of past expenditures by examining data gathered on use of current resources and services.

- **The DSGSPITF recommends creating a mechanism to continue the broader types of discussions held by the group.**

The primary charge of the DSGSPITF was to explore how the Libraries could incorporate local digital content creation and management and digital consultation into its mainstream workflows and processes. Exploring the possibilities for this meant that the group discussed many broad topics that were outside the group’s charge. These big-picture conversations were quite helpful for consideration of long term plans of the Libraries. They served as a good way to frame discussions of more specific issues.

The group believes that it will be productive to find a similar sort of mechanism to continue discussions of trends in librarianship and of the University Libraries’ vision for its future. The discussions could be explorations of a topic with the idea of applying it to the University Libraries, or in other cases the discussion could be on the macro level of a topic. This group would be a way that the administration of the Libraries could discuss any significant issues and trends in the world of libraries with unit heads. It would serve as a way to observe the horizon of library organizational and operational theory for new developments. It would also serve as an additional method of interdepartmental communication, giving unit heads another venue in which to discuss issues freely.

The experience of the DSGSPITF as it conducted its own discussions highlighted some elements
conducive to successful conversations. Finding an appropriate number of participants is one of the keys to stimulating a productive dialogue. Another key is for the participants to build a level of comfort and trust with each other to be able to discuss potentially sensitive matters. A third element of creating meaningful discussions concerning library-wide issues is that participants consider the questions from an organizational perspective rather than as a representative for their individual unit.

Any group concerned with a significant aspect of the future plans of the Libraries must be thorough and candid in its examination. Otherwise any conclusions will be based on an incorrect interpretation of the current situation in the Libraries.

**Resource Allocation**

From the outset of its meetings, the Task Force understood that its recommendations would have to be put into effect by using resources currently available to the Libraries. Some of the recommendations from the group call for expertise in new and developing disciplines within Library Science. One of our challenges was determining how to bring this expertise into the existing organizational structure without funding for new positions. Practically, there are three methods for doing this. These methods have been employed at the departmental level for some time, and it is now necessary to examine these practices at an institutional level as part of a designed plan.

The first method is to backfill a position when one opens due to a retirement or a resignation. When a librarian leaves the Libraries, it is usually a retirement of someone who has been working at the Libraries for many years. This creates several possibilities. It creates an open position that can be reviewed for its relevance to the direction of the Libraries. If it is determined that a new position will be more useful to the Libraries than finding a replacement, a new position description can be crafted, and candidates can be recruited. If it is determined that the position is necessary for the Libraries, either as it stands or with modification, the position description can be revised and the position can be filled. In that process there is the possibility to gain the expertise necessary by adding it as a component of the existing position.

Even in cases where the desired expertise is incompatible with a necessary open position, there is still a way to bring that expertise into the Libraries. In typical cases the salary of a long-term high ranking retiring librarian will be enough to hire two librarians at a lower rank. This gap between retiring and new librarian salaries allows for the possibility of replacing the retiring librarian and
adding a librarian in a newly created position. It is probable that the next three to five years will see the retirement of several librarians and the salary gap created from those departures is the most promising source for salaries of new positions.

At the paraprofessional staff level the same principles apply, though the salary gap generated by the departure of a long-term staff person is generally less than that created by the retirement of a librarian. Based on salary information from 2013, the retirement or departure of two or three long-term paraprofessional staff members would generate a salary gap that would allow one additional position if all the new positions were at an introductory level.

While looking at the creation of new positions through a salary gap it is important to note that the budget line from which salaries are drawn does not distinguish between librarians and paraprofessional staff, but there are potential challenges created if vacant positions are not filled by a new employee in the same bargaining unit as the retired employee. This may limit the Libraries’ ability to create any position that it needs. Additionally, many positions in the Libraries are not funded completely from library state funds. The salaries of those positions are partially funded by external sources, so the salary gap from turnover in those positions will be minimal.

A second method of staffing the positions necessary to achieve the goals of the Digital Strategies Strategic Plan is to redesign existing positions and assign new tasks to current personnel. For some time the Libraries have been transitioning to an environment based on providing access to digital materials. Throughout that process department heads and administrators have revised job descriptions to address new workflow needs. As new tasks are recognized they are generally assigned to an employee whose workload is perceived to be lessened due to the reduction of the processing of print materials. In this way departments have responded effectively to changing needs in an ongoing organic way. To date the majority of these altered positions are created within the individual units, and it is rare for one employee to have duties assigned across multiple departments.

As workflows are devised and modified to incorporate production and curation of unique digital materials into the regular operations of the Libraries, it will be necessary to revise some existing positions. The positions affected should be determined by a combination of supervisors, individuals in the affected positions, and administrators. It will be most useful if new tasks are assigned to positions responsible for similar tasks, or to staff members who are interested in developing new skills.

The third method of filling positions necessary for achieving the Strategic Plan goals is to reassign personnel into newly created positions. In some cases the needs of the Libraries will require that a staff member change jobs completely. That change may be within a unit or it may be across units and
may involve a substantial amount of training in tasks that are new to the individual. It is in this process that the cultures of communication, flexibility, and willingness are most critical. As with the process of redesigning positions any reassignment of a staff person should be done with the opportunity for input from the individual, the supervisors, and the administration.

The second and third methods have the potential to allow current staff members to take on new challenges and responsibilities. Staff at all levels will have opportunities to build their skill set through this process and possibly qualify for a reevaluation of their position.

A combination of the three methods offer the most realistic way for the Libraries to transform itself to allow for incorporation of local and unique digital materials into its mainstream operations. We have been practicing these methods, but with no foreseeable significant increase in funding to allow for the creation of new positions, we must now rely on them as we look to the future.
Sources


University of Massachusetts Amherst University Libraries’ Digital Strategies Group. DigitalStrategies Group Strategic Plan 2012-2015. Available in LibWire:


Marketing Workgroup Charge (2014):

Identify strategies to proactively market, coordinate and communicate a user-centric menu of library resources and services and increase organizational responsiveness to emerging user needs. The group will investigate:

- Current peer institution academic library marketing practices and best practices in market intelligence gathering and research.
- Methods to identify key user segments based on needs using existing library case studies/examples.
- Methods for targeting our offerings and tailoring our communications to specific user segments.

Marketing Work Group Final Report:

Executive Summary

Strategic marketing and communications are key to achieving the mission of the Libraries in contributing to the success of students. In our role as an investigative group, these recommendations are grounded in the recognized need to increase awareness and usage of library resources and services and in furthering desired student outcomes in accordance with the Library and Campus strategic plans.

Recommended Goals:

1. Adopt and foster a coordinated “marketing orientation” across the Libraries
The marketing process works best as a collective effort across the organization. Fostering an understanding of the value of feedback from users is critical as it contributes to the shared goal of continual evolution to meet users’ needs. Ideally, mechanisms are developed to enable staff across the Libraries to become engaged at some level in continuous information gathering that systematically identifies these needs and informs planning in order to maximize resources, identify and connect with target audiences and deliver value to our users.

Promotion is the culmination of the marketing process, and is most effective when it is the end result of targeted efforts based on user feedback and marketing research that provides deep insight into user needs. Leadership endorsement of a shared entrepreneurial philosophy is essential in order to build and sustain effective user-driven marketing efforts.

(See Appendix A: Adopting an Organizational Marketing Orientation)

**Strategies:**

- Foster a culture that embraces a marketing orientation, focused on tracking existing and emerging user needs to inform planning, initiatives, and promotional efforts for services and resources.
- Define measurable goals while aligning with our existing culture of assessment to measure and evaluate outcomes
- Develop and share a marketing mission statement and guiding principles.

2. **Create an ongoing Marketing Advisory Team**

The Marketing Advisory Team would develop and share a marketing mission statement and guiding principles. It would help coordinate the development of specific marketing plans and strategies to proactively promote, coordinate and communicate library initiatives, resources and services. The team would seek to increase organizational responsiveness to emerging needs by the collection, promotion, review and utilization of user-focused market research.

**Strategies:**

- Develop a marketing mission statement and guiding principles/best practices.
- Develop templates/modules for collaborative marketing plans for Library initiatives, resources and services in alignment with Libraries' strategic plan and mission.
• Develop a marketing proposal checklist that helps identify the target audience, stakeholders, objectives, and resources needed for implementation of specific marketing initiatives. Develop a process to regularly evaluate, refine and prioritize those proposals in collaboration with Library Communications staff and project constituents.

• All-staff presentation and dialog about the benefits of pursuing a marketing orientation across the libraries.

• Regularly advise and inform the Director, Associate Director, SMG and Communications staff on activities, and seek input as needed on prioritization of marketing proposals for library services. Provide periodic reports of support activities.

• Support the individual and collective promotional efforts of Librarian Engagement Team members and other Library groups tasked with outreach as needed.

• Collaborate with the Libraries’ Assessment Team in determining and defining measures of success and effectiveness of marketing initiatives.

• Create and maintain a Marketing knowledge base going forward; where to locate resources; ensure periodic updating and refreshing of these resources.

• Review how the Libraries might strengthen data gathering and analysis with current user tracking systems.

3. Develop User Segment Profiles to help identify Target Audiences

Develop "personas" (see Appendix B "What are personas and why do we need them?") as a tool to help re-imagine how the Libraries identify target audiences; differentiate and describe the distinct needs, preferences and priorities of targeted user segments; investigate the communication preferences for each user group; develop a means to continually re-assess appropriateness of communication to members of user groups for message customization and effectiveness.

Strategies:

• Utilize relevant target audience profiles to review library marketing plans and;
• Engage in development of personas;
• Identify and implement systematic methods of gathering feedback about the needs of specific target audiences in terms of services, resources, and information sharing. (i.e. surveys, focus groups, service points data collection).

4. Develop new processes that support the coordinated exchange of feedback about user needs and satisfaction.

Strategies:

• Develop better mechanisms to capture user comments, needs, questions continuously, systematically and consistently. Use technologies to support information and data sharing, especially about emerging user needs.
• Build Peer-to-Peer relationships to promote Resources and Services. Consider how the libraries might organize and support faculty ambassadors, a student advisory board, and celebrate and promote faculty and student grant winners (sustainability and OEI)
• Investigate training and professional development opportunities for library staff to learn about best practices in marketing and promotion in academic library settings.

Conclusion:

Academic research libraries must develop a sustained and intimate understanding of their various user communities in order to demonstrate and maximize their value to the institutions they serve. They need to be passionately focused on user needs and expectations. Marketing plans must align with overarching strategic plans.

Historically, libraries have taken a somewhat fragmented, tactical approach to marketing rather than a coordinated strategic approach. A marketing orientation embraces differentiation - "Market to a variety of people on a variety of topics in a variety of ways" - the opposite of a one-size-fits-all approach. To accomplish this, the Libraries should categorize users into different segments, not just demographic segments, segments based on behavioral characteristics and identified need sets. This way the Libraries can engage specific audience segments with core ideas that relate to their distinct needs and preferences rather than pushing broad concepts out to the entire community.

Promotion and publicity efforts require substantial time, energy and staff resources. Well-developed marketing research and support mechanisms and systematic processes that enable strategic coordination of planning and implementation across the organization are needed to maximize effectiveness.

For a list of sources, article summaries/key takeaways and further reading about academic library marketing, case studies and best practices please see the Library Marketing Workgroup folder under "Committees" on Libwire.

Appendix A

Adopting an organizational Marketing Orientation

What is Marketing?

"Marketing is a process where you find out what people want or need, provide it, ask people how you did, go back and tweak things to improve the process, and then go round again. It's a constant cycle of providing and improving services, according to user’s needs and desires." (Dempsey, 2009)

Many service professions confuse the term “marketing” with terms such as “public relations” or “promotion.” (Koontz, 2006) While promotion is a key element in the marketing process, it should
be noted that promotion is the *culmination* of the marketing process, and is most effective when it is the end result of marketing research that informs targeted marketing efforts.

Marketing has been defined in several ways:

- Finding out what the customers want and need and changing when necessary to meet their needs. It encompasses all aspects of a library from identifying and categorizing user needs to determining the services one offers.
- It is the management process which identifies, anticipates and supplies customer requirements efficiently. It is the planning process that focuses on positioning offerings, services and products to meet customer needs and then promoting those offerings to specifically targeted segments.
- It emphasizes differentiated approaches to specific target audiences as opposed to a one-size-fits-all philosophy.
- Marketing takes the focus off the product and puts it on the user's needs. Products are developed from the user’s point of view, not the producers. (Natarajan, 2002)

Historically, libraries have operated under a *production orientation*: Information resources or services are offered through one-way communication with the expectation that users will recognize their value. Product and service offerings are based on what is deemed to be right for the customer. Libraries use various methods to promote usage of resources and services. (Almquist, 2014)

Marketing is a set of activities that matches the capabilities of an organization with the needs and wants of communities served. It should form a continuous feedback loop, aligning plans and actions with needs. (Neal, 2011)

A *marketing orientation* is focused on determining real and perceived user needs first and then developing services and products to meet those needs. It focuses on two-way communication with the user, employs market research to identify users based on similarity of needs; supports continuous information-gathering, and fosters coordination and involvement among all of its functional units. Promotion is used to increase awareness to highlight what users say they need and value. (Almquist, 2014)

Academic research libraries that focus on developing a more sustained, ongoing and intimate understanding of their user communities are better equipped to formulate and achieve their strategic objectives. Ultimately the academic library needs to be passionately focused on user expectations. (Neal, 2011)

Organizations use marketing as the basis for the following overarching strategies:
Marketing involves the process of conducting market research, segmenting customers into groups based on their specific needs, establishing measurable goals, developing targeted promotion of products or services to them, and following up by assessing the outcomes. (Polger & Okamoto, 2013)

One can describe the Marketing process as four sequential and continuous major steps:

1. **Market Research**: Identifies potential and actual customers needs and wants
2. **Market Segmentation**: Groups customers who share similar wants and needs.
3. **Targeting** the right audience and **positioning** the product or service: The "Marketing mix" determines how resources are allocated and deployed to communicate value and deliver products and services that satisfy those needs. (The classic "four p's" of the marketing mix are price, product, placement and promotion)
4. **Marketing evaluation**: Measures success (assessment), informs further market research. (Koontz and Mon, 2014)

Organizations use marketing as the basis for the following overarching strategies:

- Market Penetration: Existing Products to Existing Markets
- Market Extension: Existing Products to New Markets
- Product Development: New Products for Existing Markets
- Diversification: New Products for New Markets

**What is market segmentation and targeting and why is it so important?**

Segmentation is based on creating different offers for different sets of users (and would-be users). This differentiated approach tailors the offering, the message and the promotional channel to the characteristics of specific user segments. The process is twofold: it involves first deciding what factors differentiate the groups of people to whom you are marketing and secondly developing different value propositions for each of them.

Defining market segments by user need sets as opposed to demographic distinctions or internal library functional divisions is critical in reframing the way the organization provides products and services.
Examples of approaches to defining user segments in an academic library:
- Segment by Research needs: Type of support, instruction, data management needs
- Segment by Production needs: Project management, technology, data management support
- Segment by Consumption needs (Resource delivery): Resources, Collections, Equipment
- Segment by Facilities Usage needs: Technology, study space, meeting space

"Business models are a process for creating, capturing and delivering value. A big part of business model innovation comes from identifying underserved or un-served needs around campus. Which populations don't receive a lot of attention? Do people have issues that no one else is addressing? Are there niche groups that others are ignoring or simply don’t have time or functionality to handle?" (Mathews, 2014)

Model Library Structure Emphasizing the Transformative Bidirectional Information Flow Necessary for a Full Realization of the Marketing Orientation (Almquist, 2014):

"Incorporate a bidirectional information flow, acknowledging that the central tenet of the marketing concept is a focus on user needs as a basis for the creation of services. The structure is designed to seek input from users, build user awareness, and solicit feedback to evaluate the library's performance in effectively meeting needs."
Sources:


Koontz, C., Promotion is not the same as marketing, *Marketing Library Services*, (2006) 20 (1)


Appendix B

What are "personas" and how would we use them?
In developing a marketing orientation for an organization, the creation of personas can play a useful role in the differentiation and development of successful products and services to address specific needs. Creating profiles of target customers and studying them throughout your product development lifecycle makes it easier to understand specific user group needs, context, and pain points.

Personas are fictitious characters created to embody specific key characteristics of target user groups. Personas allow you to package user research data into sample user profiles that can, in turn, be used to develop use cases for your offerings and services.

Personas offer many benefits for those undertaking marketing projects, including:

- Making assumptions and knowledge about users explicit and thereby giving the team a common language with which to talk meaningfully about users
- Allowing the project team to focus on a small set of specific users who are different than the team members
- Building empathy towards users in a way that reports of qualitative and quantitative data cannot accomplish

For more information about developing personas, see:

The Learning Space Toolkit:

http://learningspacetoolkit.org/needs-assessment/working-with-data/creating-personas/


NCSU Libraries personas: