

Management of Information Programs and Services (INFM 612) 2013

**Library Circulations and Reservations:
A View of Organizing Information**

Rakhi Bharekar, Myeong Lee, and Bryon Baumstarck

*Masters of Information Management
University of Maryland, College Park*

Table of Contents

Executive Summary.....	3
1. Introduction	3
2. Problem Statement.....	4
3. Objectives.....	4
4. Methodology.....	5
5. Summary of Findings.....	6
5.1. Organization adaptability, change, and innovation	6
5.2. Management of human resources, diversity, and individual behaviors.....	7
5.3. Leadership, motivation, and teams	10
5.4. Communication.....	12
6. Major Issues	13
7. Recommendation.....	15
8. Conclusion.....	17
References	18
Appendix	19

Executive Summary

Understanding managerial practices is essential to improving the effectiveness of management, as well as improves an organization as a whole. In order to better understand these practices, both theoretical and practical knowledge is necessary. To this end, a single organization's managerial practices were observed and analyzed to improve the understanding of how certain managerial practices effect both the organization and the customers of that organization. The analysis of the organization was conducted based on the organizing and leading pillars of management established in Richard L. Daft's book after obtaining data using several methodologies.

1. Introduction

The Circulation and Reserves Desk at the McKeldin Library, located on the University of Maryland's College Park campus, was chosen for this project because it was observed that they exhibit several characteristics of management. Some of these characteristics are: organization adaptability, change, and innovation; understanding and management of human resources, diversity, and individual behaviors; leadership, motivation, and teams; and communication. These characteristics are described in detail by Richard L. Daft in his book *Management*, and by relating the management characteristics of the Circulations and Reserves Desk to the concepts in Daft's book, we are better able to understand the reasons for these characteristics within an organizational setting. In the following section, we state problems found while conducting our project. Then, we define our objectives in section three, and provide methodologies we used to analyze the organization in section four. In section five, we present our findings through the

methodologies specified, and then provide our analysis in section six. Finally, we suggest solutions in section seven.

2. Problem Statement

The Circulation and Reserves Desk deals with various kinds of information, such as patron records, printed and non-printed materials, and internal/external materials requests; in addition, the Circulation and Reserves Desk also deals with several different patron groups, such as students from various campuses and universities, alumni, faculty, researchers, and general community members. This variation in people is not only limited to the patrons using the library, but also includes the employees of the Circulation and Reserves Desk, such as part-time students and full-time staff. Since the amount of information is so vast and the types of people involved with the Circulations and Reserves Desk vary broadly, it can be problematic to organize the information and the organizational structure accordingly. We focused on these points and studied how the organization tried to address these issues, which are abstractly defined as “information complexity,” “multi-type user interaction,” and "diversity-oriented conflict."

3. Objectives

The purpose of this project was to understand how the McKeldin Library Circulation & Reserves Desk organizes and manages the information used in processing requests for library materials, as well as analyze the organization in terms of management styles and historical perspectives. The primary focus of this analysis is in regards to the Organizing pillar of management, with a secondary focus on the Leading pillar. The analysis will provide first-hand experience and

knowledge concerning key concepts about management learned in class, and will further expand our understanding of the various functions of, and tools used in, management.

4. Methodology

Three in-person interviews were conducted for this project, and the interviewees consisted of Judith Kidd, C&R Library Tech II; Jamie Edwards, C&R Coordinator; and Timothy Hackman, Head of Resource Sharing and Access Services (refer to Figure 1 in the Appendix). Interviews were approximately one hour each, and scheduled during normal library hours. The interviews were the primary data collection and clarification method utilized for this project. In addition to the interviews, a literature review was also conducted, and was based on brochures available at the Circulation and Reserves Desk at McKeldin. The library system at the University of Maryland is converting all paper information to digital information, and as a result, minimal information was obtained through this method. However, as a result of the interview with Timothy, a paper copy of the strategic plan with mission, objectives, and action plan of the Public Services division, and the library as a whole, was obtained for review. The Circulation and Reserves Desk did not have a specified strategic plan.

The website for the library (<http://www.lib.umd.edu/>) was also reviewed for detailed information about the services provided by the Circulation and Reserves Desk, and the 'Ask Us' tab on the website provided information about the various questions that patrons ask staff at the Circulation and Reserves Desk. We chose the above mentioned methods of data collection because of the possible sensitive nature of the information being obtained, as well as providing a more personable information exchange. In addition, as there are three people involved in this project,

the in-person meeting style facilitated a greater degree of interaction between the interviewee and all members of the project team.

5. Summary of Findings

Our research found several key management concepts being practiced by the Circulation and Reserves Desk management personnel. The theoretical understanding of the various management concepts learned in class was enhanced by the observation of these same concepts within a 'real world' organization. These concepts will be categorized in the following way:

- Organization adaptability, change, and innovation
- Understanding and management of human resources, diversity, and individual behaviors
- Leadership, motivation, and teams
- Communication

By describing the observed practice of these management concepts, and analyzing the theoretical language learned in class, we can better understand why certain management practices help an organization and why some hurt an organization.

5.1. Organization adaptability, change, and innovation

The Circulation and Reserves Desk is transitioning from an informal team structure to a vertical, functional structure that is less authoritative; however, some staff members, particularly the student employees, operate in a matrix structure because they move across departments in order to complete a specific task, but the coordinators for a particular department remain the same. The Circulation and Reserves Desk has a decentralized form of authority in respect to the organization as a whole, as each staff member is accountable for the work assigned to them, and

any staff member is able to contact any level of management without going through their direct supervisor; thus, ignoring the chain of command.

The majority of the Circulation and Reserves Desk staff members are self-motivated employees, which bring about increased productivity, employee satisfaction, and, in return, less resistance to any change being implemented. As the Circulation and Reserves Desk is currently undergoing a structural reorganization, this reduction in resistance to change is essential to the success of the reorganization. In addition, training sessions are provided to full-time staff members in order to allow them to better compete their tasks, and team-building activities are conducted along with feedback reviews in order to help employees understand their contributions to the organization and improve the employee's motivation to work and create a collaborative culture. This collaborative culture also encourages innovation, primarily in the form of emails and in-person communication, to improve business processes, functions, and services provided.

5.2. Management of human resources, diversity, and individual behaviors

According to Timothy Hackman, Head of Resource Sharing and Access Services, "Diversity is our greatest strength." This statement shows that not only is the staff of the Circulations and Reserves Desk diverse, but that the employees as well as the management see this diversity as a positive aspect of the organization. This mindset displays an organizational culture that embraces diversity, and, according to Daft, this provides better utilization of employee talent, increases quality of team problem solving, as well as increases the understanding of the marketplace (Daft, pg. 363). This increased understanding of the marketplaces allows the Circulation and Reserves Desk to provide a better experience to all of its various patrons.

In addition, embracing diversity reduces the amount of prejudice and discrimination within the organization and removes organizational barriers such as the glass ceiling. This has the effect of bringing the organization into compliance with federal regulations; thus, reducing the cost and negative media surrounding discrimination lawsuits. Also, embracing diversity reduces the effect of ethnocentrism exhibited by the employees, and provides a means of increasing collaboration and innovation by tapping into the experiences and ideas of a broad knowledge base; thus, making the use of multicultural teams an extremely effective tool within, as well as a competitive advantage for, the Circulation and Reserves Desk.

Diversity also has an effect on the human resource management within the Circulation and Reserves Desk. This is mainly due to the fact there are not just full-time employees but also part-time employees, student work-study staff, and graduate assistants. In addition to this broad employee structure, the student work-study staff and graduate assistants have a high degree of turnover. Thus, managing this complex employee structure is a daunting task. However, due to the mindset of embracing this diverse and broad employee base, human resource management tactics are specifically suited to take advantage of this structure. This is accomplished by the use of the “new social contract” whereby it is understood that a balance between work life and personal life is essential (Daft, pg. 332). This is achieved by the use flexible working hours, empowerment of all employees to perform their task without requiring management approval, and leniency towards student employees conducting schoolwork during working hours, provided it does not affect the performance of their duties.

In addition, full-time employees are provided specialized training, and, in turn, provide mentoring to the student employees. As the Circulation and Reserves Desk operates directly with its patrons, this training is not only in regards to technical operations but also in customer service. Some of this service is provided to special needs patrons, and as such the employees need to have an understanding of the requirements of these patrons to better serve the patron's needs: thus, ascribing to the University of Maryland Libraries strategic vision to "ensure the success of all users in their academic pursuits" (Mission, pg. 3).

In addition to this training, it is essential that the personality traits of the Circulation and Reserves Desk employees are appropriate for this customer service oriented function. Some of these traits include being outgoing, social, comfortable with interpersonal relations, ability to get along with others, calm, as well as others (Daft, pg. 397-398). This means that human resource personal must take into account more than just work-related qualifications, but must also observe the person to ensure a proper fit for both the potential employee and the Circulation and Reserves Desk. As stated earlier, the environment of the Circulation and Reserves Desk is one of customer interaction, and, as a result, stress can cause disruption within the organization as well as between the staff and the patrons. Therefore, stress management is essential to maintain the best possible environment for all. As a recent step to reduce this work-related stress, the management personal of the Circulation and Reserves Desk have instituted a number of 'retreats' for the employees; thus, helping to relieve stress, as well as increase collaboration among the various departments.

5.3. Leadership, motivation, and teams

Leadership, motivating employees, and managing teams/groups are very important terms in a leading organization. Especially when it comes to dealing with complex information, collaborative teamwork is essential since it is almost impossible for an individual to deal with that information not only due to its amount, but also because of the complexities of information systems and tools. Teamwork and leadership are closely related to organizational culture because cultural experience comes directly from team members with or without leadership. In this subsection, we focus on how the Circulation and Reserves Desk manages teams to achieve their organizational goals, what kind of leadership and motivation are dominant, and what kind of culture is associated with them. Since their main job is to deal with various kinds of information from the library, the findings here can be a valuable base to understand issues in the Circulation and Reserves Desk.

Starting with culture first, throughout the interviews, it was found that the organizational culture has been changing from a hierarchical and top-down culture to a horizontal one in association with internal and external changes. According to Jamie, a coordinator in the Circulation and Reserves Desk, there have been external market changes and internal motivation for anticipating trends. The external market changes were mainly due to the increased demand for electronic resources such as e-books or web resources. Related to this, they also started to proactively deal with future trends, which conveys their organizational culture to be open and innovative.

As the culture changes, its required leadership has also been changed from hierarchical to more horizontal and authentic leadership. Timothy, the head of Resource Sharing and Access Services,

has been in the Circulation and Reserves Desk for approximately nine months and is trying to encourage employees to collaborate with each other and to create a more collaborative organizational culture. One example of these efforts is collaborative a brainstorming session held during the winter 2013 session (see Figure 2 in Appendix). Within this open culture, there were still aspects of a top-down approach in regards to policy management. Each library branch had a high degree of autonomy in the past, but the policy management is becoming more consistent throughout the university according to Jamie. Policy creation is getting more collaborative since units are working cooperatively with each other on the policy, while at the same time there are some aspects of top-down approach within each department.

Teams are another point that shows the degree of leadership. According to Timothy, project-based, short-term teams are becoming more dominant while they used to have a self-directed, long-term team structure in the past. Since the term 'team' in the Circulation and Reserves Desk is thoroughly following the concept of the textbook, team-based work accompanies the concept of horizontal structure within the department and project-based formal teams indicates stronger leadership in structuring process. In terms of motivation, employees are said to be self-motivated in regards to career development. Leadership is trying to encourage employee motivation through consistent policies, collaborative activities, and company-sponsored attendance at educational events, but still a big portion of motivation resides in the employees themselves. There are no significant programs or activities that focus strictly on motivation itself within the Circulation and Reserves Desk.

5.4. Communication

Organizational communication can be of three types: Downward, Upward and Horizontal.

Downward Communication: At the Circulation and Reserves Desk, the downward communications occurs through team meetings, monthly meetings with departments, emails, intranet boards, meetings with other library heads, etc. In these team meetings, the goals and strategies design and implementation guidelines are provided, job instructions and rationale are communicated, procedure and practice changes in the policies if there are any, performance feedback in case of appraisals or accolades won by an employee is recognized, indoctrination in the form of team building activities are conducted such as end of semester staff parties, and more. Policies, practices, and job instructions are also disseminated using emails.

Upward Communication: Upward communication in any organization is required for proper and smooth function of the organization. Upward communication usually takes place in order to hear about patron and lower hierarchical staff problems and expectations, if they have any suggestions for improvement, innovative ideas for performing tasks, submit performance reports to the higher management for analysis, grievance and dispute reports, and financial and accounting information. All of which are used in order to make any change in the policies, job function, or the strategy of the Circulation and Reserves Desk. At the Circulation and Reserves Desk, patron grievances and disputes are directed to the particular coordinator in order to be resolved. For instance, the billing and fine disputes are directed to Evelyn Yocco, coordinator of the Billing and Accounting department (refer to Figure 1 in the Appendix). Every coordinator looks after their department as per its process/function within the organization.

Horizontal Communication: The horizontal, or interdepartmental, communication usually takes place via personal communication channels. The department coordinators exchange changes in policies and practices personally. Also, there is email communication in case there are any major changes in the workings or function of a department. At present, there is less interdepartmental communication at the Circulation and Reserves Desk. In addition, as the organization is being vertical departmentalized, horizontal communication is taking less precedence. The Circulations and Reserves Desk is making a transition to being more collaborative in order to fuse the departments so they are less dependent on a single individual for a certain function; thus, enabling communication of any intradepartmental changes in policies, change initiatives, and improvements, as well as to increase interdepartmental coordination in case of staff absence or termination.

Team Communication: At the Circulation and Reserves Desk, there is centralized communication within each department. For instance, the coordinators are the point of contact for any information in regards to the department. Whereas, communication is decentralized across the organization as a whole, enabling the coordinators and the head to communicate with each other with reference to any procedure or policy changes.

6. Major Issues

The greatest challenge for the Circulation and Reserves Desk is the complexity and disparity of its information technology systems. This complexity is due to the fact that there are separate technological tools used by different departments within the Circulation and Reserves Desk. In addition, each tool has a different user interface, and this increases the specialization within each

department and reduces organizational collaboration. These systems are controlled by various departments within the Circulation and Reserves Desk, as well as by outside organizations such as the University of Maryland's Office of the Bursar (billing). Also, the use of a tool common to other libraries, such as ALEPH, is constrained to certain specifications to ensure operability at various locations. This dispersion of its information systems has resulted in a lack of control of the systems by the Circulation and Reserves Desk. The management of the Circulation and Reserves Desk has acknowledge this issue as needing correction, and as such has embarked on a collaborative effort among other University of Maryland libraries, community libraries, and staff to create a new integrated library management tool called KUALI (<http://www.kuali.org/>). KUALI would integrate the ability of the Circulation and Reserves Desk to manage patron fines, book requests, digital materials, and more into a single tool.

Another major challenge for the Circulation and Reserves Desk is the high turnover rate of its staff. While this turnover is not necessarily related to the organizational environment, it does present a major problem for the effective utilization of its human capital because when that employee leaves, the time and money spent on training that employee is now gone, as well as the knowledge that employee possessed. In addition, as the Circulation and Reserves Desk moves to a more digital process, more technical training will be required for the staff to successfully perform their task. This additional technical training incurs more cost to the Circulation and Reserves Desk, or it will require a change in the compensation offered by the Circulation and Reserves Desk to recruit and retain technically skilled employees.

A few observed challenges are not within the control of the Circulation and Reserves Desk, but these issues are directly related to a patron's ability to utilize the services of the Circulation and Reserves Desk. The main issue in this category is the lack of consistency in user authentication systems used by the various campuses. This reduces the usability of the online resources, and limits the ability of the Circulation and Reserves Desk to control of access to these resources if a patron's fines are overdue. Another, yet related issue, is the control of the billing functionality. Currently all billing information is managed through the University of Maryland's Office of the Bursar. This system is separate from all the other systems, and because of this, there is no feedback between the Bursar's office and the Circulation and Reserves Desk to verify if a patron has paid their fees. This may result in loss of valuable material, as it was mentioned by Timothy has already happened before. Another, possible, issue is the user interface of the library website, as information concerning the services provided by the Circulation and Reserves Desk is scattered across several pages.

7. Recommendation

For the complexity of information systems, the effort for the integration is already on-going in the organization since it is the most fundamental and known issue. Before stabilizing the system, the best way to deal with this problem is 'training' as Jamie stated. Of course, various trainings are going on, but they can be ineffective due to the high turnover as mentioned in the previous section. To reduce the ineffectiveness, a well-defined and organized training system is needed. For example, a systematically planned mentor program, regular information systems training sessions, or refined OJT documentation by employees using Delphi method can be considered.

Furthermore, there must be a concerted effort to retain the intrinsic knowledge from all employees to reduce the loss of knowledge and training time when an employee leaves the Circulation and Reserves Desk. This can be achieved with internal collaboration applications, such as those utilized by larger corporations. This can be as simple as a company Wiki page, or as elaborate as a fully developed social networking application like IBM's SocialBlue.

Whichever tool is used, it is essential that a tool be utilized to reduce the dependence on a single individual for a function. This was explained by Timothy by an example of an employee going on vacation for two weeks, and no one knowing how to perform that person's task. Therefore, the high employee turnover rate can be turned into something positive because the knowledge will be retained, as well as the rapid introduction of new knowledge from the new, diverse employees.

It is also highly recommended that there be a consistency in the authentication systems used for all the libraries under University System of Maryland and Affiliated Institutes (USMAI). Lack of consistency has resulted in a very non user-friendly login system that is both confusing to users and difficult to maintain. Additionally, research is needed to understand the users of the internet services provided by the Circulation and Reserves Desk to provide a more cohesive, user-oriented interface. This is also related to the use of electronic resources, as the access of the digital resources provided by the Circulation and Reserves Desk are also scattered throughout the library website. Transfer and sharing of digital access rights between libraries is also needed in order to better facilitate the sharing of digital resources and knowledge. It is strongly encouraged that the Circulation and Reserves Desk continue working on the development of the KUALI system to correct the majority of the observed issues.

8. Conclusion

Despite the transitory nature of the organizational culture, and the shift from printed material to digital material, it was observed that the Circulation and Reserves Desk management characteristics are very appropriate for the functions performed. These characteristics provide a culture of communication, diversity, and collaboration, and this in turn leads to innovation. However, retention of knowledge should become a primary objective of the Circulation and Reserves Desk in order to mitigate the issues of specialization. In addition, the work on developing a new integrated system is commended, but the Circulation and Reserves Desk should not stop there. More innovations are needed, but not all innovations require direct control. Therefore, the Circulation and Reserves Desk should become an advocate for knowledge in order to better fulfill the University of Maryland libraries' mission to "enable the intellectual inquiry and learning required to meet the education, research and community outreach mission of the University" (Mission, pg. 3).

References

Daft, Richard L. (2012). *Management*. 10th edition. United States: South-Western Cengage Learning.

Appendix

Internal Organizational Architecture

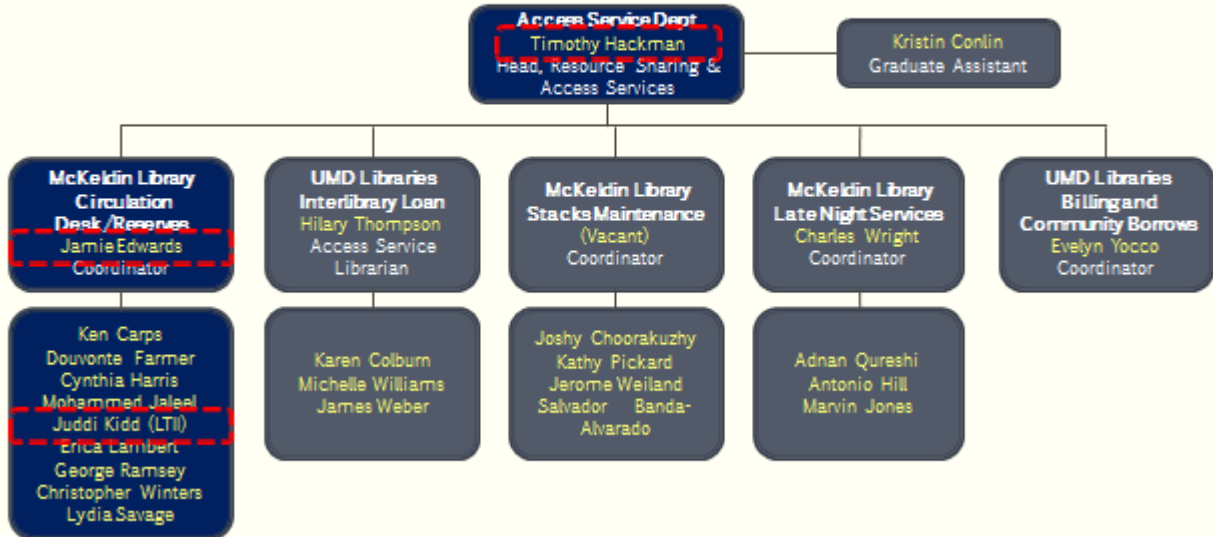


Figure 1: Organizational Chart

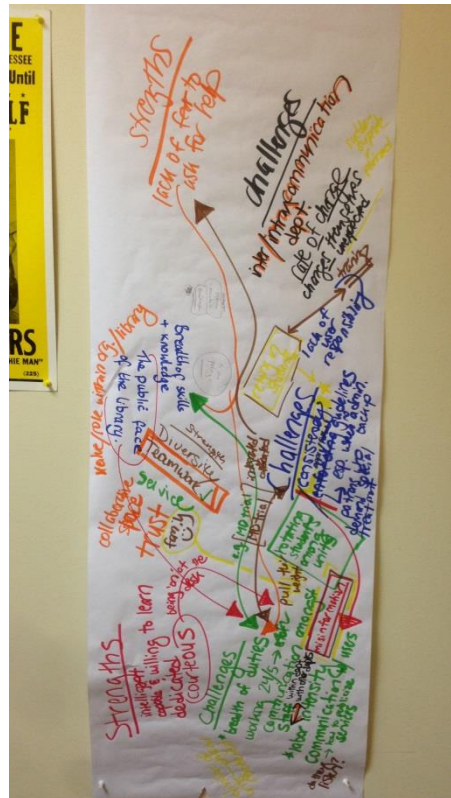


Figure 2: Group Activities

University of Maryland Libraries
Updating 2012 Strategic Plan

October 5, 2012 DRAFT Tasks and Timeline

Through Oct.	Directors, associate/assistant deans and dean conduct sessions with their units' staff members around these themes: 1. What's been done, including - o What financial/resource investments have been made; infrastructure 2. What needs to be done, including - o Connecting plan update to L&A and capital budget 3. What's missing in the 2012 plan that needs to be added now, including - o What the budget buys the Libraries strategically Jane Williams and Jamie Edwards will organize and focus a Nov. event to celebrate accomplishments and learn what's missing in proposed updates
Early Nov.	Unit session leaders will forward notes to Williams
Early-Mid Nov.	Williams will compile library-wide document • Focus on big accomplishments under objectives (not down to "action" level) • Focus on cross-divisional accomplishments • Send to all staff as prework for Nov. event. Williams will send other messages to staff to encourage attendance and to bring ideas, especially for 2 and 3 above
Nov. 29	Conduct session to gather more ideas and input on accomplishments and possible new activities (facilitated by Edwards and Williams)
Dec.	Compile session's outcomes and distribute
Jan. 2013	Update plan as indicated and distribute link Devise and carry out ways to keep staff updated and engaged

University of Maryland Libraries
Event to Celebrate Accomplishments and to Update and Re-Focus 2012 Strategic Plan

November 29, 2012, 2:30 p.m. – 4:00 p.m. Room 6137 McKeldin Library; Draft Nov. 21

"Everyone's a detective regarding the environment and where we're headed."
Dean Steele at Library Assembly meeting, September 19, 2012

- 2:30 **Welcome** and review outcomes of event
- Recap achievements** since Jan. 2012
 Outcome: Set stage and raise awareness of what's been done
- 2:40 **Panel** on Practices and Potential for Engagement with Committee on Institutional Cooperation (**CIC**), Big Ten Conference
 Outcome: Get overview of CIC environment and initiatives
 Panelists: Pat Steele, Gary White, Dan Mack, Carla Montori
- 3:05 **Q&A** about CIC
- 3:15 **Brainstorm** (in small groups) new ideas, information and suggestions for **what needs to be done**, in self-selected groups for
1. "Providing Information in All Its Forms" (collections)
 2. "Serving Our Communities" (services)
 3. "Leveraging Our Expertise" (staffing)
 4. "Creating Environments for Academic Success" (space, infrastructure)
- And taking into account this background:
1. UMD Libraries' Selected Accomplishments as of Nov. 2012
 2. "2012 top ten trends in academic libraries"
 3. New possibilities given Big Ten and CIC membership
- Outcome: engage staff to refresh the plan
- 3:35 **Report out** from small-group work
 Outcome: Identify recurring ideas or themes
- 3:55 **Next steps**
 Outcome: Assure staff that work will be incorporated in formal update to library strategic plan
- Charge** from Pat Steele
 Outcome: Challenge and encourage staff to stay engaged and help make connections from library strategic plan to unit and individual work plans

University of Maryland Libraries
Strategic Plan – with actions
June 30, 2010 and updated January 2012

This plan is a living document, newly updated with input from units and individuals across the Libraries, and from an all-staff session in November 2011. We have tallied accomplishments and, where objectives have been completed from the June 2010 plan, we have removed them from this December 2011 edition, in order to make room and emphasis for initiatives that are underway but not finished or that are entirely new. The preface that accompanied the June 2010 plan can be found at

<http://libi.lib.umd.edu/documents/strategic-plan-2010>

The philosophy it expressed undergirds this update. That philosophy speaks of the Libraries' value to the university, our vision for rapidly changing services and operations, and daily efforts to realize our potential. The guiding statements below are from the July 2010 plan.

Vision

The University of Maryland Libraries will ensure the success of all users in their academic pursuits. By strengthening connections and contributing vigorously to the intellectual life of the campus, the University of Maryland Libraries will advance the university's mission of inspiring and supporting excellence.

Mission

The University of Maryland Libraries enable the intellectual inquiry and learning required to meet the education, research and community outreach mission of the University.

Partnerships

Partnerships are essential to the success of the Libraries in meeting established goals in every strategic area. The Libraries will create the maximum connectivity to research, teaching and other networks at all levels – campus, regional, national and international – in order to raise the quality and breadth of the information environment for research and teaching. In so doing, the Libraries will also take maximum advantage of College Park's location in the heart of the DC-Baltimore library-rich area.

Funding

The Libraries will engage in a variety of strategies to fund this ambitious plan. The Libraries will reallocate existing resources, develop partnerships to leverage strengths, engage donors, increase grant income, and explore other income-generating programs.

Key to abbreviations:

ASD Administrative Services Division
CMSC Collection Management and Special Collections
DO Dean's Office
ITD Information Technology Division
LA Library Assembly
PSD Public Services Division
TSD Technical Services Division

GOALS AND OBJECTIVES

I. PROVIDING INFORMATION IN ALL ITS FORMS

Collections will support the teaching, learning, and research needs of students and faculty. We will be thoughtful and responsible as we acquire additional items while also being cost-effective, creative, and aggressive in establishing new models. We will utilize freely available, open resources whenever possible.

Goals

- 1) Ensure that programs are closely tied to library user needs.
- 2) Balance the acknowledged value of acquiring (and owning) collections in traditional formats (e.g. print materials) with the provision of alternate modes of access to information resources.
- 3) Balance print, electronic, and multimedia collections with the needs of researchers across disciplines with varying research practices.
- 4) Exercise the Libraries' stewardship responsibilities, especially as they relate to developing and managing specialized collections.

Objectives

A. *Research, Scholarship and Creativity*

- 1. Identify and implement strategies for addressing annual inflation of purchased library materials.

	FY	Action	Division	Status
i	11+	Develop and carry out strategies for effective use of student technology fee earmarked for Libraries, specifically to address pressures on purchased acquisitions ➤ Selectors identified candidates through their collaboratives ➤ CMT will voted on a ranking of candidates ➤ Dean Steele and D. Vikor approved list of candidates and shared them with the student committee ➤ G. Foudy has submitted ERFs to Acquisitions Acquisitions is in the process of negotiating licenses and placing orders for the resources	CMSC	active
ii	11+	Maximize existing multi-year agreements with journal [NEW: and video database] publishers • Implementation of multi-year agreements with Elsevier and Wiley – will renew Wiley (possibly through the MPowerment Alliance) by December 31, 2012	CMSC	active
	12+	• Negotiated a multi-year agreement with Springer through Lyasis		

		lead a Research Data Services program on the UMD campus. ITD hired a Post-MLS Research Data Librarian and started development of a business case for research data services that will be managed out of the Libraries for the University community. ITD is managing the development of the business case.		
--	--	---	--	--

7. Other partnerships

	FY	Action	Division	Status
i	13+	Become contributing member of the Library Publishing Coalition Terry Owen and Jennie Knies of ITD identified the opportunity and proposed membership.	DO/ITD	active
ii		Kuali OLE Development	PSD TSD ITD	Active

II. SERVING OUR COMMUNITIES

By engaging undergraduates, graduate students, and faculty to determine their needs, we will develop in-person and virtual services that ensure success, that align with library resources, and that take advantage of technology. As possible, services will support the broader research community.

Goals

- 1) Review, improve and expand the Libraries' online presence to deliver an increasing number of services virtually, including within campus platforms and social networking arenas.
- 2) Optimize delivery of services.
- 3) Support discovery, learning, research, and collaboration.
- 4) Play a strong role in educating students, along with training faculty and students in using traditional and emerging research tools.

Objectives

A. Education

- 1. Examine where and how services can best be delivered to users; explore alternatives to branch-based services.

	FY	Action	Division	Status
i	12	Implement a book-paging service. In Phase I of this project, ITD is developing and plans to test, in October of 2012, paging of items for library-pickup for CP faculty and grad students. Release of this service is scheduled for this semester. ITD has started, for Phase II of the project, the development of tools and interfaces for delivery of items to faculty departments via campus mail. We are also	PSD/ITD	research & planning <i>Phase I - Active need stats for 1st semester expand to Undergrads</i>

III. LEVERAGING OUR EXPERTISE

The actions that characterize the valued services we provide students and faculty—assessing needs and finding answers—also define how we operate day-to-day. We love a challenge. By leveraging our collective expertise and developing new skills, we will lead the University of Maryland to greater levels of accomplishment.

Goal

Create and sustain a supportive environment and inclusive workplace for library employees to contribute to the overall goals and success of the Libraries.

One way in which the Libraries can realize the full potential of its diverse workforce is through shared governance. Library Assembly encourages all faculty, staff, and administrators to participate in developing policies for fulfilling the Libraries' mission to the University.

Objectives

A. Faculty and Staff Development

- 1. In all activities, promote and support a diverse staff and faculty and a healthy organizational climate.

	FY	Action	Division	Status
i	11+	Create and carry out strategies for receiving broad, ongoing feedback for HR office from library groups and units. Projects and activities for 2012 included impromptu and planned site and unit meetings and working with various committees. Site and unit visits included: Access Services, Art Libr., EPSL, HB, ITD, TSD and UM Campus Career Ctr. Committee meetings included Staff Affairs and FMARC.	ASD, LA	Active
ii	12	Explore viability of staff mentoring program. Identify potential partnerships to assist and support this effort. Act on findings of exploration. In partnership with SAC and in consultation with Campus HR, LHR developed the pilot staff mentoring programming this year. They conducted general information sessions, orientation sessions for mentors and mentees, a "kick-off" session with the Dean, SAC, mentors and mentees and LMG, and launched the program this October.	ASD, LA	Pilot program commenced
iii	12	Create mechanisms that support workplace diversity (e.g., interdisciplinary, intergenerational project groups). Ensured that Faculty position ads were placed with ALA in their Black Caucus section and in their Diversity Group	ASD	Active & Ongoing

		assist in workforce planning for Access Services. Work initiated Fall 2012, will continue in 2013		
v	12	Expand two-year Post-Masters Program to link hiring to areas of strategic importance Hired three employees as part of this program (Access Services, Digital Preservation, and Research Data Services)	DO	active
vi	12	Establish contact with at least ten library/information science schools for recruitment purposes by October 2012. Added three additional Library Schools to our existing list of contacts, expanding the network in an effort to enhance our applicant pool.	ASD	Actively ongoing.
vii	12	[New] Review issues associated with compensation to determine uniformity and equity issues and make recommendations as needed. In 2012 LHR reviewed faculty compensation data across the 4 levels to determine parameters and means and will be producing compensation adjustment and hiring guidance for hiring managers based on this data.	ASD	Actively ongoing.

IV. CREATING ENVIRONMENTS FOR ACADEMIC SUCCESS

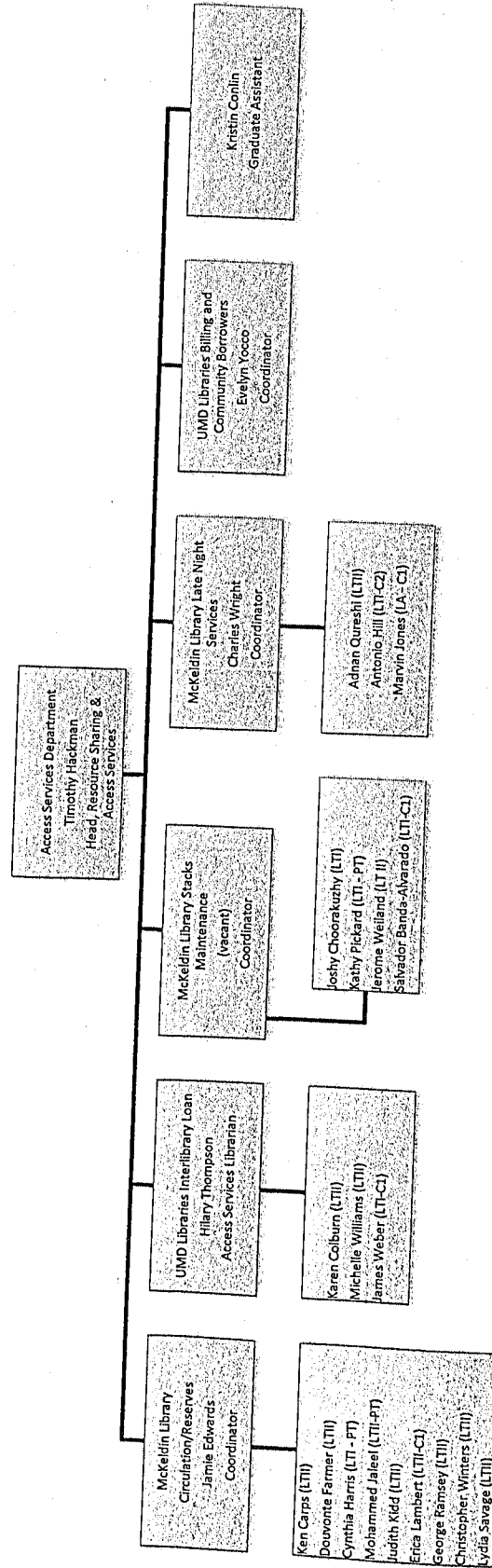
The imaginative and purposeful use of space will factor into much of our strategic activity. Environments will serve users in comfortable and productive ways. By encouraging study, collaboration and partnerships, library spaces will be hubs of intellectual activity.

Goals

- 1) Develop spaces to reflect library users' needs and expectations and library staff's needs to work comfortably and efficiently.
- 2) Involve partners in defining and sharing space within the libraries.
- 3) Consider space in relation to collection development strategies.
- 4) Ensure flexibility for future changes.
- 5) Make decisions based on reliable data and evidence.
- 6) Balance the bottom line of each operation, including procurement, voice and data communication systems, and space management, to ensure quality and service.

Objectives

A. Education



**University of Maryland Libraries
Public Services Division
Strategic Plan Update Summary**

November 2012

In 2012 the Public Services Division emphasized several broad areas of effort in support of the Libraries' Strategic Plan. With the new AD starting in Fall semester, broad public services planning has begun in earnest and there are many new and continuing initiatives for public services, collections, and outreach. The PSD recognizes that there are rapid changes in higher education that are impacting the roles of librarians and the services that are offered. The PSD is committed to developing evolving models of forward-thinking services and programs to meet the changing needs of our faculty and students. We will accomplish our goals through the encouragement of creative and innovative ideas, through continuous workforce development and support, and through wide-reaching partnerships and outreach activities with our campus and broader communities. These initiatives will ensure that the Libraries continue to occupy a central role in the overall research, teaching and service mission of the University.

1. **Serving our Communities.** Examine where and how services can best be delivered to users; implement changes.

The division has focused on a large number of services improvements and space planning projects during 2012. The new Associate Dean for Public Services is now in place and many initiatives are now just starting. These are briefly summarized below.

Spaces

- McKeldin Space Planning – 1st Floor redesign group is working to develop the new first floor services/space plan for McKeldin Library.
- Architecture Library – planning future spaces and services with faculty/administration in Architecture.
- Art Library – Beginning work to plan future use of spaces; meetings held with department heads (October) and faculty (mid-November). Will work to develop plans on space during spring 2013.
- Chemistry Library – Plans for new group study room.
- EPSL – Plans for new hands-on instruction lab; preliminary plans for project for reconfiguring spaces and services to support scientific research and to develop "science commons."

- User Education led project to improve all McKeldin instruction rooms in summer 2012. in addition to building a new multipurpose space (i.e.MCK 7111) that will serve as an instruction and staff meeting room.
- Preliminary plans to develop future faculty/research commons area in McKeldin Library.
- Project to consolidate juvenile collection/reduce periodicals to create more user space.
- Beginning project to analyze microforms and possibly relocate some collections.

Services

- Liaison Task Force – Charged in October to develop core competencies and assessment tools for liaison librarians. Task force will recommend tools to help further develop skills that our liaisons need as they work ever more closely with faculty and engage in models of embedded librarianship.
- TLC desk offering expanded equipment loan program. Equipment loan program expanded to EPSL and Chemistry Library. Investigating future implementation in Architecture.
- User Experience Group – Accomplished any activities related to discovery efforts and to acquiring new equipment and software for student/public use.
- LibAnswers implemented, will result in improved services and assessment of research/information services.
- Web pages updated and migrated.
- Workshops offered for EndNote.
- GIS librarian working with Campus GIS Steering Committee. GIS workshops offered in Libraries.
- User Education led workshops for librarians on Canvas, on learning outcomes assessment, and on the use of various software applications including Zoomerang, Camtasia and SnagIt (video).
- Faculty Book Paging Service – in testing for Fall, implementation in late fall.
- Architecture is using kiosks to provide on-site use of needed materials.

- First floor and TLC services planning. I-school team is examining first floor service models. Merged desk trials in McKeldin taking place during Fall 2012.

2. Providing Information in All Its Forms. Develop a coherent and comprehensive plan for collections, curation, and stewardship and a future emphasis that addresses relevance to institutional needs and the broader regional, national and international impact of collections. Develop and implement strategies for alternative collecting models.

- PSD working closely with CMSC on all aspects of collections planning and building.
- Ebooks and e-preferred models are being implemented.
- Working closely with TSD and ITD on discovery efforts. Planning future leadership of overall discovery efforts in Libraries in conjunction with these units.
- Subject librarians and special collections are collaborating on joint collection development and related outreach.
- PSD heavily involved in collections realignment projects. Significant planning and work on McKeldin reference and architecture projects. Future projects commencing soon in Art and EPSL.
- Hired eResearch Librarian (Fall 2012) and Government Information Librarian (Feb. 2012) to lead efforts in collections and services planning in these areas.
- Preliminary investigation into support for eResearch/Research Data Management with ITD and other units.
- Project to examine microforms holdings/collections and possible move started Fall 2012.
- Implemented Films on Demand at Shady Grove; investigating this and audio streaming services at College Park.

3. Partnerships, Collaboration and Outreach. The Public Services Division and UMD Libraries cannot complete their work without effective collaboration across the Libraries, and with partners outside the Libraries. Several collaborations will receive particular attention this year.

- National Library of Medicine (NLM) - NLM, UMB, UMD and USG signed a 2011 MOU. Two initiative started in Fall 2012: Providing health information to the general public and project examining internships/student projects.
 - International efforts - Several subject librarians have formed partnerships with faculty to teach study abroad classes. One class went go to Nicaragua (Business School, January 2012); a second class (iSchool, summer 2012) went go to St. Petersburg, Russia. Nicaragua class will be repeated in January 2013; St. Petersburg class will be repeated in Summer 2014.
 - Fieldwork students - A critical function of Libraries is to partner with the iSchool and other Schools on campus to contribute to the education of new professionals. Several projects underway, including:
 - iSchool team examining first floor service models (Fall 2012)
 - iSchool class to examine support of distance education students (Spring 2013)
 - Social Venture Consulting Project (Smith School of Business) – project to examine the library's evolving role on campus
 - User Education heavily relies on hiring excellent librarians-in-training (i.e. graduate students) to participate as instructors for the Libraries' information literacy program for first-year students
 - Mventures - Meetings with leaders to discuss library partnership with Innovation Labs/Office hours. Exploring offering services in the EPSL Library starting late fall/early spring.
4. **Employ workforce planning analysis and tools. Assess and rebalance workloads of Public Services librarians and staff.**

Associate Dean is examining divisional organizational structure and workloads. Liaison Task Force will develop tools and metrics for liaison work. Further work in this area will occur in 2013.

University of Maryland Libraries Public Services Division 2012 Action Plan

In 2012 the Public Services Division will emphasize four broad areas of effort in support of the Libraries' Strategic Plan. Within each broad area, a number of specific initiatives and measurable accomplishments are articulated.

In 2012 priority will be given to establishing a working relationship with a new Public Services Associate Dean, and linking financial and human resources to the strategic plan. Identifying and realizing the resources to do the work is critical. With rapid changes in the university environment and in ways information is used and disseminated, there is also a strong need for the Libraries to examine and strengthen partnering relationships and in understanding user needs. With extensive and deep public interactions, the Public Services Division is well positioned to undertake this work.

1. **Serving our Communities. Examine where and how services can best be delivered to users; implement changes.** A critical area for the division's work in 2012 will be to examine how services can be improved, and implementing targeted changes.

- a. **Establish User Experience Group (UEG).** UEG will make suggestions for improving Library services from a broad, strategic perspective. Note: UEG effort crosses divisions and UEG reports directly to LMG.

By October 2012: UEG and UEG subgroups will be functioning for specific areas, including WorldCat Local; process for approving new public equipment/software requests (connected to strategic plan) will be operational; priorities for WorldCat Local work will be established and in process of implementation; WorldCat Local training/learning program for Library employees will be in place; Faculty Book Paging Service will be established after Summer 2012 pilot. UEG work involves all Divisions; some projects involve campus partners.

- b. **Explore Alternatives and Enhancements to Branch-Based Services.** In 2011 a study of the Architecture Library was undertaken. Study results were presented in early 2012. Implementation changes and review of the Art Library will begin. Understanding user needs across Libraries locations will be critical.

By October 2012: Plan for Architecture Library changes will be complete, initial implementation will have begun; collection downsizing and World's Fair collection move to Hornbake will be underway; and integration of the Architecture Library with the Visual Resources Collection will have begun; the Architecture Library approach will be reviewed and modified for application to Art Library; Art Library review will be underway; a plan for additional ethnographic studies of branch libraries and/or library services will be developed;

USG will reconfigure space including converting a classroom to be a silent study room (completed), merging circulation and reference desks, and will complete an analysis of whether to convert second classroom to a technological lab and how to engage adjunct faculty to work more closely with the library and USG. Leads: PSD Managers, PS Director/Associate Dean. This work will involve DO, all Divisions, Assessment, and Heads of MSPAL, Architecture Library, Art Library.

- c. **Establish Terrapin Learning Commons (TLC) Service Model.** This work will be an extension of the 2011 evaluation of the information and research services.

By October 2012: TLC "Oversight" Group (Libraries, Division of IT, Office of Undergraduate Studies) and TLC Coordinating Group are established; 2012 and longer term priorities are identified; initial staffing model for 2nd floor of McKeldin is established; initial student success services are in place within TLC; communication plan is created and implemented; McKeldin Equipment Loan Program service model is established; and equipment loan program has been expanded at McKeldin and a second location. Leads: TLC Oversight Group, TLC Coordinating Group. Work involves DO, all divisions and campus partners.

- d. **Enhance Library Liaison Program.** Examine nature of work, functions and workloads of subject liaison librarians, implement initial changes. Subject librarians will provide an increasing suite of embedded services, and develop new expertise, including eResearch and data management. These new efforts will require increased subject librarian outreach to their departments. Establishment of TLC service model will result in shifting some liaison work to others.

By October 2012: Leadership of the liaisons program will be reviewed; written job expectations for subject librarians will be updated and vetted through stake holders (to be implemented Spring 2013); equipment needs for subject librarians and other PSD employees will be evaluated and criteria for appropriate equipment (desktop vs. mobile, etc.) will be established. Leads: PSD Managers, PS Director/Associate Dean. Work will involve ITD.

By October 2012: eResearch discussions will have occurred on how subject librarians will be involved in eScience/eResearch; subject librarian training program about what eResearch and data management are will be under development; and selected librarians will include data management topics in instruction and will be involved in departmental outreach to evaluate researchers' needs. It is anticipated that in the future subject librarians will offer specific classes on data management in different disciplines. Leads: PSD Managers, PS Associate Dean, ITD/Digital Stewardship Unit.

- e. **Establish a Blended Instruction Program** that contains elements available 24/7. This effort builds on the Libraries' strong instruction program and initial efforts in 2011. The strategic planning action items in this area have been rewritten to better align with campus thinking: 1) In tandem with redesign of the Libraries' website, build new e-learning tools for users (i.e. guides, videos, etc.) that will teach how to use our resources, services and collections. 2) Further develop learning outcomes assessment activities across the Libraries' teaching initiatives to improve student learning, both in general and subject-specific instruction. 3) Collaborate with ITD, Division of IT, and AS to improve teaching equipment in McKeldin Library's instruction labs. Action items 1 and 2 will receive particular attention in 2012.

By October 2012: A clear definition of what Blended Learning is within the Libraries' information literacy program will be developed, as well as criteria for when blended learning should be used; UES will have trained librarians on effective use of virtual instruction techniques; courses where blended learning fits best will have been identified and subject librarians will implement at least one digital tool or format (e.g. guide, video, podcast...) in content delivery; the Libraries' learning outcomes assessment activities will be expanded into more subject specific instruction; and a new multiuse room for teaching and meetings will be created in McKeldin (7th floor). Leads: TLC/Student Support Services, UES. Work will involve ITD and AS.

- f. **Build Federal Government Information Program**. With the hiring of a government information librarian the program will be reviewed and strengthened.

By October 2012: Create a government information outreach/training program within the UMD Libraries; establish partnerships with 64 FDLP selective libraries via spring meeting, work on GPO forecasting project, and exploring training needs; implement ASERL Document Disposition System for the Region; and complete FDLP collection assessment to identify needs and Center of Excellence focus. Leads: TLC/Student Support Services, GovMG.

- g. **Physical Plant**. Respond to information learned via 2011 ethnographic study and other information from users.

By October 2012: Better definition of quiet and noisy spaces across the Libraries; increase in quiet spaces seating; expanded electrical outlets for the public; expanded public seating; release of study carrels for on demand use; on demand lockers available. Leads: PSD, DO and AS.

2. **Providing Information in All Its Forms.** Develop a coherent and comprehensive plan for collections, curation, and stewardship and a future emphasis that addresses relevance to institutional needs and the broader regional, national and international impact of collections. Develop and implement strategies for alternative collecting models. PSD librarians and staff are critical partners

with CMSC in collection development areas outlined in the Strategic Plan. Subject librarians are curators of general collections, Access Services staff care for general print collections, and MSPAL curators curate their special collections. Most initiatives below will be led by CMT. PSD librarians and staff will contribute to and also lead in these efforts.

a. **Develop and implement strategies for patron-driven acquisitions (PDA) collecting model.**

By October 2012: Policies for ordering rather than interlibrary loan will be developed; GIST Pilot Program will be implemented within ILLiad. Lead: CRCT. Work will involve ACQ, CMT, PSD, and ITD.

b. **Develop and implement strategies for other alternative collecting models - EBooks and Consortia.** Under leadership of CMT participate in and develop e-book acquisitions initiatives and consortia building for seamless access to e-resources.

By October 2012: A working group will be created for USMAI libraries to identify barriers for seamless access to e-resources for students accessing them from multiple campuses, and to begin resolving barriers. Work involves USMAI, DO, CMT, TSD and PSD/USG.

c. **Assessment and digitization of collections.** Under leadership of CMT, subject librarians will be key participants in assessing and redefining the general print collections. Over time, onsite general print collections will be dramatically reduced and moved to electronic or other locations, in support of a re-envisioned 21st century library. Activities will involve establishing criteria for when to retain print, when to digitize (preservation and access level), creating metadata, and selecting last copy. Special collections will be digitized when appropriate, under curator leadership. CMT will lead this overall effort, providing parameters for the project's first steps and setting of October 2012 accomplishment targets. Work will involve TSD, ITD, subject librarians, and curators to accomplish this transformation.

3. **Partnerships, Collaboration and Outreach.** The Public Services Division and UMD Libraries cannot complete their work without effective collaboration across the Libraries, and with partners outside the Libraries. Several collaborations will receive particular attention this year.

a. **National Library of Medicine (NLM).** NLM, UMB, UMD and USG signed a 2011 MOU to identify projects in which the institutions could partner and: 1) Develop curricular and educational initiatives designed to increase access to careers in medicine and health; 2) Develop and participate in educational programs that expand community access to high quality and timely health care information; and 3) Develop and participate in curricular initiatives in library and information sciences that expand community understanding and access to medical and health resources.

By October 2012: Initial meeting of partners will be held (completed January 31, 2012. Topics discussed: 1) Research Topics and Opportunities; 2) Community Access; Access to Careers in Medicine and Health; and 3) Curricular Initiatives in Library and Information Science.); working groups will create recommendations for review by all MOU partners. Lead: USG Priddy Library, PS Director/Associate Dean. Work will involve all MOU partners.

- b. **International efforts.** Several subject librarians have formed partnerships with faculty to teach study abroad classes. These librarians embed themselves into courses, participating in curriculum development, assisting students with library work, and developing relationships with libraries and organizations overseas.

By October 2012: One class will go to Nicaragua (Business School, January); a second class (iSchool, summer) will go to St. Petersburg, Russia; ways to assess effectiveness of these efforts will be identified. Lead: HSSL. Work involves iSchool and Business School.

- c. **Community borrowers.** The UMD Libraries are consolidating non-UMD affiliated borrowers into a community borrowers program.

By October 2012: All non-UMD affiliated borrower groups will be folded into the program including Friends of the Libraries, Special Borrowers and Alumni. Lead: Access Services. Work involves UMD Alumni Office, DO, and ITD.

- d. **Fieldwork Students.** A critical function of Libraries is to partner with the iSchool and other Schools on campus to contribute to the education of new professionals.

By October 2012: The division will identify a set of opportunities that lend themselves to fieldwork experiences; opportunities will be advertised via Libraries HR; a significant number of fieldwork students will be working within the division; assessment of the fieldwork experience will be completed in support of IMLS grant. Leads: PSD Managers. Work involves Libraries HR, Assessment.

4. **Employ workforce planning analysis and tools. Assess and rebalance workloads of Public Services librarians and staff.** The division's work is not evenly distributed. In 2012 the division will focus on staff levels to provide core services, and expectations of what staff work will be. Systematically looking at Librarian work will come in a later phase.

By October 2012: Identification of metrics for workload analysis for PSD staff will have begun and a group will be in place to do a study; core levels of service (i.e., TLC/reference; 'keeping the doors open') and what to stop doing will be under review; staffing levels to provide core services will be under review; and PSD discussions about updating role of subject librarians/liaisons will be well underway. Leads: PSD Managers, PS Director/Associate Dean. Work involves Assessment, Libraries HR.

DONE
Comm. Researcher
added 12/17/12