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Developing the library partnership – the Loughborough way

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This article explores why and how Loughborough University Library has been developing a different model of engagement with its academic Schools. It considers the internal and external drivers of the project, as well as detailing the tools that were developed, the model itself and the challenges and benefits of library partnership.

Why develop a model?

Loughborough University Library has a staffing structure comprising three teams: Academic Services; Support, Collections and Systems; and User Services. The partnership project was initiated by members of the Academic Services Team. The team is made up of 7.5 FTEs at MA6, known as ‘Academic Librarians’, one of whom is based on Loughborough’s London campus, and 1.8 FTE AD4 Senior Library Assistants. It is managed by a 1.0 FTE MA7 Academic Services Manager post, which is divided into a 50:50 job-share. The Academic Librarians have a traditional subject librarian remit of research and teaching support, with each having responsibility for liaising with one or more Schools or departments. Whilst engagement with academic staff and students takes place across all of the different Library teams, the Academic Librarians are the foci for School interaction.

The Academic Librarians on both campuses are well regarded by their academic colleagues and students. This fact was reiterated during the 2016 Quadrennial Review of the Library by the University’s academic leadership team, but the review also suggested that there was some inconsistency in relation to the awareness of the Library offer, across the different Schools. As a result, a recommendation in the review report was for the Library senior management team to work with the Academic Librarians to establish consistent practice across the Schools. This specific internal driver, linked with an awareness of how other university libraries, such as York, Manchester and Nottingham (Eldridge et al. 2016), were beginning to explore a customer relationship management approach to their engagement activities, led to the development of what was initially called the ‘Customer Relationship Management project’ and to it being driven forward by the Academic Services Team.

The Loughborough approach

At the beginning of the project, the liaison model at Loughborough was based on the Library providing specific services to the departments or Schools and the aim was to adopt a model which was more focussed on working in ‘partnership with the customers’. However, it is important to state that the team did not start the project with a specific model in mind and decided to spend the first phase exploring what customer relationship management looked like in the higher education library sector, and what might work most effectively in the Loughborough University environment.
A small Steering Group was created, made up of volunteers from the Academic Services Team who were enthusiastic about building deeper relationships with the Library stakeholders. A project plan outlining the key activities was generated; with communication as a key activity for the Steering Group to ensure there was buy in from the teams within the Library as well as the wider Library stakeholder community.

A literature review was undertaken to see what had been published on customer relationship management in higher education libraries. Not surprisingly, much has been written about CRM tools and strategy, but there are fewer examples of it being applied in an academic library setting (Wang 2007), (Leligdon et al. 2015). A benchmarking activity was also undertaken to see what approaches had been taken at other UK higher education institutions with a view to Loughborough adopting best practice. Reflecting on the findings it was decided to change the name of the project from CRM to Library Partnership Model as the partnership aspect was seen as key to embedding this change at Loughborough. It better represented the Loughborough environment and was more self-explanatory.

A Library stakeholder map was created based on two factors, influence and importance. Senior academic staff in the Schools were identified as being of high influence and of high importance in relation to developing partnerships and it was agreed to focus on this group for Phase 1 of the project. Informal interviews with academic staff in different roles across a range of Schools were conducted to capture their views on the current level of engagement with the Library and to identify any potential blockers. The general consensus was that things were working well; the academics were happy to work more closely with the Library, but rather than attending internal School meetings it might make more sense for the Library to explore other ways of getting updates.

In parallel, an internal audit was undertaken to identify the different types of Library data being collected, the file formats, locations of the data and the current reports being generated. Looking at this from a stakeholder viewpoint the question was also asked, “What Library data do you want to see and how do you want this information presented?” The data collection work is continuing.

The benchmarking exercise highlighted a number of different tools that are being used to capture CRM or engagement activities, e.g. Microsoft Dynamics, SharePoint and some tools developed in-house. To purchase or develop a CRM tool is a major investment and whilst a case is being built, some changes have been made to an existing tool used by the Academic Services Team so that engagement activities can now be captured and reports generated.

A team away day focusing on the Library Partnership Model provided an excellent opportunity to bring the whole team up to date on progress. This was followed by a team exercise which involved mapping the current engagement activities, for the individual Schools/departments, under the broad headings of: knowledge of the strategic vision for the School; sharing knowledge and reviewing the School’s use of library services; and
knowledge of School teaching and research. This created a colourful map of types of engagement highlighted in green (engaged), yellow (some engagement) and pink (no engagement currently). The aim is to revisit this engagement map periodically and see whether there is an increase in the number of engagement activities highlighted in green.

A model is nothing without the people to bring it to life and an anonymous survey was conducted to identify the skills that the team members felt needed to be further developed to support working in partnership. The skills identified were advocacy, positive influencing, resilience, data manipulation and visualisation.

The Library Partnership Model

Taking into account the work from the project, our knowledge from years of liaison with Schools and departments at Loughborough and elsewhere, and the very helpful informal conversations with academics, a model was developed based on four pillars. These were:

- Shared knowledge of School vision and strategy;
- Effective liaison and advocacy;
- Active partner in teaching and research;
- Co-creation and delivery of an annual action plan.

Under each of the headings were listed the purpose and examples of key activities, so both the team and the Schools could understand what the model would mean in practice. This draft model is reproduced in Figure 1.

Figure 1: Draft of the Library Partnership Model
With the draft model now created, we needed to get buy-in from our key stakeholders, the Deans of the Schools. We needed the Deans to understand what the Library was aiming to achieve with the model, so that they would agree to the changes that would need to come from the Schools to ensure its success; most notably access to meetings and their own time. The Head of Academic and User Services and the Academic Services Managers met with each of the Deans over a period of four months to discuss the draft and the actions that would be needed by both the Library and the School to ensure the model’s success. All of the meetings were successful in achieving the Dean’s support, developing a better understanding of the School’s needs from a partnership and how this could best be developed. As a result of the meetings the model was tweaked and actions developed for each School and each Academic Librarian to take forward into the second phase.

What we have learned

The key changes after the meetings with the Deans are highlighted in Figure 2:

![Figure 2: Loughborough University Library Partnership Model](image)

Whilst increased consistency of offer was still one of the key aims of the project, the discussions with the Deans highlighted the need for some flexibility in our approach, to ensure success across the range of disciplines and cultures within the Schools. Although each School had a senior management team, the Schools operated in subtly different ways. Some Schools were federal and still had departments, others were programme-based, whilst one was about to transition from one structure to the other. Some Schools were very
hierarchical and formal, whereas others were less so. We had to determine the most appropriate way to work within each School’s structure so that our ultimate objectives were achieved.

We also learned from our meetings that whilst the Dean was obviously an extremely important post within a School, the post-holders were aware that they were not always the most appropriate person to pass on knowledge about the direction of teaching and research in a practical way, and they suggested conversations with their Associate Deans for Teaching (ADT) and Research (ADR) as contacts instead. More regular meetings with the ADRs and ADTs therefore became part of the model and replaced attendance at Research Committees and Learning and Teaching Committees. This was because it was felt that the ADT and ADR meetings would be a more time efficient way of gaining the information that the Library needed, although receiving the minutes of the committee meetings was still encouraged. The Deans also suggested that the annual meeting with them to discuss the School-Library Action Plan should also include the ADTs and ADRs.

Actions that arose from the meetings and following reflections on their outcomes included Academic Librarians being invited to all staff-student liaison committees within the Schools, Academic Librarian inclusion on School websites to raise their visibility and Academic Librarian inclusion on departmental and School mailing lists, as well as at meetings with the ADRs and ADTs. Whilst some Academic Librarians already had some of these actions in place, not all did so. It was also the case that after meeting with the Deans, the Head of Academic and User Services and the Academic Services Managers felt that the Deans now had a clearer idea of the range of support that the Library could offer the School, especially in relation to research support, which was not an area that many of the Deans had considered as a Library role, even though it is an area in which we are playing an increasingly important part.

Future challenges

Before we go on to consider the benefits that the Library Partnership Model has already brought, it is important to acknowledge that there are still challenges to be met. The key challenges are internal rather than in relation to the Schools. The Academic Services Team has understandably led on developing the model and rolling it out to the Schools; however, for it to be truly successful it has to be a full Library endeavour. All of the teams within the Library engage with the staff and students of the Schools and we currently do not have a tool to measure or map this broad range of engagement. We also have to ensure that the intelligence that we gather from the Schools is fed into all of the relevant channels in the Library. We are currently considering how to achieve this most effectively. It has been agreed that the Academic Librarians should deliver a report about their School to the Library’s Management Group each year, so the Group is aware of the developments within the School in a strategic way, as well as receiving information via the usual team reports on
an ad hoc basis. There will also be two Library Staff Forums where Steering Group members will report on the project and ask for staff ideas and input.

We also have to ensure that the Academic Services Team and the Academic Librarians in particular are supported in this time of change. Whilst some have been operating in a partnership way for a number of years, others have not had the opportunity to do so and are having to develop new skill sets and confidences. The partnership working also affects the balance of the work of an Academic Librarian, which has previously tilted more towards student support and teaching, than engagement with staff and awareness of the effects of School strategies. Effective engagement takes time, which is inevitably in short supply, and so decisions will have to be taken about how to balance the workload, how to work more efficiently and what might have to be dropped from the team and individual portfolios as a result.

Benefits

Although we are still in the early stages, the Loughborough Library Partnership Model has already brought a number of benefits to the team, the Library and the Schools.

From the team perspective, a number of Academic Librarians have mentioned how the deeper engagement work has enriched their role, as they begin to see the bigger picture of the School strategy, how research support is so important to the academics and how the Library and School work inter-relates. Some of the training that they have received has been appreciated, particularly in relation to positive influencing, and there has been increased sharing of best practice and support for each other through the establishment of small subject clusters or partnerships within the team.

From a Library and School perspective, the raised visibility of the Academic Librarians and the Library, as a result, is a benefit. Some Deans had a very traditional idea of what the Library’s role was in the University and it was helpful to be able to explore and explain the wider support it now offers, such as supporting and measuring publication strategy in cooperation with the Research Office. The importance of Library consultation at an early stage in the development of modules and programmes was also highlighted as a means of ensuring that the correct collections were being developed. It had been assumed that the Library was aware of such developments as a matter of course, which sadly is not always the case, although the activities as result of the model should help with this going forward.

Practical benefits include the fact that Academic Librarians are now attending a number of School meetings, at different levels, that had not been open to them previously and are therefore able to address staff or student needs directly and communicate changes, such as the arrival of our new Library Catalogue. They have also been able to alert Library colleagues to developments that are important to know in a timely way, such as a School changing its module codes system for the next academic year, which has large ramifications for our
online reading list system, but with this early warning, it is being managed effectively. If the Academic Librarian had not been there to pick up on this piece of information, it is unlikely that the School would have alerted the Library, as the way in which the reading list system connects to the virtual learning environment is not an area in which they are expected to be expert.

Conclusion

The Loughborough Library Partnership Model has taken time to develop and put into operation, but all of this groundwork has ensured that it has already successfully deepened the level of engagement that the Library has with the Schools. It has been a team effort, with the work of the Steering Group and the Academic Librarians’ willingness to adapt their practices, being key to the success so far. Challenges remain as we move towards developing the action plans in partnership with the Schools over the summer, but we are confident that Model has strong foundations and that the benefits that we have already seen as a result of the changes will continue to grow.

References

