

## Office of User Services Annual Report FY16

### I Unit Narrative

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The Office of User Services is responsible for the coordination of user services functions across the Library and, specifically, for supporting assessment, information literacy and instruction, and staff development and training, and user experience. All areas are advised by standing committees of faculty and staff. Our efforts focus on developing and supporting infrastructure in user services generally as well as assessment, information literacy, training and development, and user experience specifically. Within these areas of focus, we provide ongoing professional development and organizational capacity building within the Library and, as appropriate, across the campus.

This report includes information about accomplishments across the Office of Services, incorporating activities led or supported by Jen Yu (Assessment) Lisa Janicke Hinchliffe and Crystal Sheu (Info Lit), Zoe Revell and Beth Woodard (Staff Development), Suzanne Chapman (User Experience), and JoAnn Jacoby (AUL for User Services). The focal area(s) responsible for specific contributions are noted below, but collaboration and cross-fertilization is very common in our work, so many of these activities drew on support from across the Office of User Services, as well as contributions from others throughout the Library. More detail about accomplishments and goals in specific areas are provided in the appendices.

Suzanne Chapman departed before this report was drafted so while we attempted to highlight her most significant contributions, this is at best a partial reporting of her success in launching a user experience program and furthering progress on a user-centered approach to our web content development.

#### **Major activities and accomplishments of the unit in FY16 (July 1, 2015 to June 30, 2016):**

##### Developed, managed, and improved tools to increase productivity and learning across the organization.

- Furthered the Library's e-learning program by managing the Library's license for Blackboard Collaborate and working with Library IT to investigate the DIY Library open source software and managing the Library's use of LibGuides and LibAnswers, including system administration, vendor relations and training. (Info Lit)
- Administrated the e\*vents calendaring and event registration system. (Staff Development, Info Lit)
- Managed DeskTracker, which is the public service (reference & gate count) tracking system used by all library units. (Assessment)
- Managed the E-Resources Usage Statistics tool for library staff to request and evaluate electronic resources usage. (Assessment)
- Participated in the management of academic searches, with Tom Teper, AUL for Collections, and Donna Hoffman, Library Human Resources, and User Education Committee. (Staff Development)

##### Gathered, analyzed and disseminated data to inform service priorities and programs.

- Compiled statistical reports and analyses needed for budget reduction discussions and the Budget Group's GA allocation deliberations. (AUL for User Services, Assessment)
- Compiled library statistics need for unit Annual Reports (Assessment)
- Managed the Library Assessment Grants program. (Assessment).
- Provided data analysis and consultation about assessment projects (Assessment) for:

- Research Information Services

- Reference Management Team
- Library IT
- International & Area Studies Library;
- University Archives
- Library Facilities
- Office of Collections & Technical Services
- Office of Research
- Maintained and generated reports from the Library Instruction Statistics Database. (Info Lit, Assessment)
- Coordinated data gathering and reporting for campus and national statistical programs. (Assessment) (See Appendix 4)
- Administered the Ithaca Graduate/Professional Student Survey in partnership with the Graduate College (Info Lit), served on the survey working group (Info Lit, Assessment) and mined the data to inform ongoing decision-making and strategic communications. (AUL for User Services, Info Lit)

#### Planned and coordinated events for staff development and information sharing.

- Assisted in planning the Library Retreat in January 2016. (AUL for User Services, Staff Development, Assessment, Info Lit), provided data analysis (Staff Development, Assessment) and preparing and disseminating follow-up recommendations. (AUL for User Services)
- Offered a variety of face-to-face training sessions. (Staff Development, Info Lit, AUL for User Services)
- Organized and led GREAT Customer Service training initiative which included hosting 2 library-wide training sessions, visits to multiple units, and 2 training sessions for the Main/UGL hub. (Staff Development)
- Wrote and received marketing grant for GREAT customer service training materials. (Staff Development)
- Organized training and support for supervisors (Staff Development), including:
  - Intensive workshops for 15 supervisors
  - Discussions with the University librarian
  - Monthly discussions for previous supervisory workshop participants.
- Offered 75 webinars at hosted locations in the library, on a variety of topics. (Staff Development, with Info Lit and Assessment sponsoring webinars specific to those areas) (See Appendix 3)
- Continued to implement and expand the wellness program. (Staff Development) (See Appendix 3)
- Continued to refine and implement a multi-faceted professional development and support system for teaching and learning. (Info Lit) (See Appendix 1)
- Served as co-lead of the GSLIS-Library Teaching Alliance (Info Lit)
- Served on the ClimateQUAL® Response Team. (AUL for User Services, Assessment, Staff Development)

#### Fostered communication and cooperation among Library faculty and staff, and recognized excellence.

- Posted entries on the Growing People Blog. (Staff Development)
- Led the effort of the Awards and Recognitions Committee (co-chaired by Beth Woodard), solicited nominations and selecting recipients for awards to honor staff, undergraduate student workers, graduate student workers, academic professionals and faculty, solicited nominations from all AP supervisors eligible for award and doubled the number of nominations. (Staff Development)
- Chaired Library Assessment Committee (See Appendix 4) (Assessment), Advisory Committee to the Associate University Librarian for User Services and the User Services Leadership Team (AUL for User Services), Staff Development and Training Advisory Committee (Staff Development), and User Education Committee (see

## Appendix 2). (Info Lit)

Contributed to campus-level groups and initiatives.

- Contributed to campus management and improvement of classrooms through the Instructional Space Advisory Committee (AUL for User Services) and the Informal Group on learning Spaces. (Info Lit)
- Developed partnerships with campus units related to teaching and learning including the Center for Innovation in Teaching and Learning. (Info Lit, AUL for User Services)
- Chaired the Campus Faculty Bookstore Advisory Committee. (Info Lit)
- Served on the Provost's Council of Unit Executive Officers. (AUL for User Services)
- Participated in the Data Solutions Group. (Assessment)
- Served on the First Destination Initiative Advisory Group. (Assessment)
- Served on the Provost Office ePortfolios Committee. (Info Lit)

Supported Library faculty research and career progress.

- Served on the Promotion and Tenure Advisory Committee and participated in the reviews of the 1,2, and 3Y Peer Review reports. (Staff Development)
- Served on the Research and Publication Committee, helping to determine funding for research projects, mentoring new researchers, and planning events to develop research capacity. (Staff Development)
- Met with untenured faculty to determine their support needs attended untenured lunches and leading discussions. (Staff Development)
- Met individually with all new unit heads in User Services monthly, held a one-time orientation meeting with all new unit heads across the Library, and instituted regular (once a semester) meeting with all public service unit heads. (AUL for User Services)
- Continued Assessment Open Office Hours and provided consultation to library faculty research projects that involved assessment, surveys, and data analysis. (Assessment)
- Served on the Specialized Faculty Task Force. (AUL for User Services, Assessment)
- Served on the Task Force to Create a Promotional Path for Academic Professionals in the University Library. (Assessment)

 **Major challenges faced by the unit during that period:**

- The changes from the Academic Library Survey (NCES, conducted every two years) to IPEDS (report annually) and the ACRL Annual Survey created significant confusion among the library assessment community. The changes resulted in additional work for us and more importantly, raised issues regarding the annual statistics data quality.
- Orienting and welcoming new professional staff and planning for departures, as detailed in the next section.
- Managing the growth of the Library's elearning program.

 **Significant changes to unit operations, personnel, service profile, or service program:**

- Sue Searing retired August 2015 and JoAnn Jacoby was appointed as Associate University Librarian in October 2015. The Office of User Services helped ensure continuity throughout and following this transition in a number of ways, including:
  - Beth Woodard served as ombudsman for resolving patron issues during the interim.
  - Following Sue's departure, Jen Yu assumed permanent responsibility for submitting statistical reports to The Association of Research Libraries (ARL Annual Statistics) and the Provost's Office (Strategic Planning Metrics).
  - Monthly Office of User Services meetings were instituted in October, with a focus on coordinating activities and longer range planning.
  - A few months prior to this leadership transition, the University Library underwent an

administrative restructuring which has transformed the role of the AUL for User Services. As a result, the AUL for User Services has engaged more directly with units within this portfolio and taken an active role in budget management and budget reductions.

- Welcomed a User Experience Librarian to the Office who began the process of developing a systematic UX program prior to her departure in June 2016. Suzanne Chapman's departure in June 2016 leaves a large gap in the Library's overall user experience program as well as on the Web Team. Specific impacts include:
  - Loss of key leadership for coordinating the content strategy for the website migration.
    - Over the short-term Bill Mischo has agreed to provide oversight of the web migration effort during the first year of intensive implementation. Longer term, the Library is launching a search for a web manager and has approval to follow that hire with a search for a Web Content Specialist (both reporting through the Office of User Services).
    - While essential for moving forward with the website redesign and migration process, these positions will not address the full range of user experience programs. The Office of Users Services will continue to advocate, when resources allow, for finding ways to fulfill the crucial role of catalyzing the organization to ensure that the experience of users become a key principle in service design and delivery.
  - The Web Team lost expertise in data analysis and usability testing as well as content management and user experience.
    - Jen Yu will provide support for data analysis (Google Analytics) and assessment work as needed to help fill some of these gaps.
  - Anna Lawrence had been working with Suzanne on a user experience and usability practicum. Prior to her departure, Suzanne provided a solid foundation of core readings and ideas for specific projects of immediate value to current projects.
    - JoAnn Jacoby and Megean Osuchowski assumed responsibility for the practicum and oversaw Anna's work on a number of projects, including a usability walkthrough of three library spaces as well as conducting X/O tests, heuristic evaluations and card sorts to inform the development of the new staff intranet
  - Suzanne was providing advice and support to Facilities on their project to overhaul signage and wayfinding in the Main Library.
    - While Facilities is continuing with this project with guidance from the AUL for User Services and others, Suzanne's expertise in integrating wayfinding principles and terminology across physical space and online platforms leaves a significant gap.
- Crystal Sheu's, E-Learning Specialist's departure in July 2016 means that the library no longer has a person working to create partnerships with campus units supporting elearning and embed library services and collections in elearning platforms.
 

Some responsibilities have been shifted to Library IT, Reference and Information Services, and the E-Resources Working Group. Lisa will manage and oversee LibApps platform and LibGuides, but our programmatic approach and presence in campus conversation about elearning will be less robust.

**Ways in which the unit and/or its members contributed to Library-wide programs:**

Since the Office of User Services has a span of responsibility that is by definition Library-wide, this section highlights projects and committees which office members did not lead, but to which they contributed significantly.

- reference, research consultations and other information services
  - Contributed hours to the Main/UGL reference hub. (Staff Development, Assessment)
  - Worked with Reference Management Team to continue planning for the further evolution

- of a tired service model and the creation of 1st floor service point (AUL for User Services)
  - Meet monthly with the Chair of Reference Management Team and provide funding for and spoke at the 2016 Reference Retreat
- scholarly communications and publishing;
  - Developed the framework and infrastructure for the Library Occasional Reports Series, supported by an Innovation Seed Fund Grant. (Info Lit)
- diversity
  - Zoe Revell serves on the Diversity Committee this year and will take on co-chair role next year. (Staff Development)
  - Served on the Chancellor's Committee on Accessibility and Accommodation) and convened an informal advisory group of faculty, students and librarians to provide input and help plan for accessibility improvements within the Library (AUL for User Services).
  - Served on the ClimateQUAL Response Team (Assessment, Staff Development, AUL for User Services)
- public engagement
  - Hosted Barb Linderman during a lunch-time brown bag to talk about mentoring in the local schools (Staff Development).
- discovery and access
  - Served on the Content Access Policy and Technology Committee (CAPT) before (Info Lit, Staff Development) and after (User Experience, AUL for User Services) reorganization of that Committee in fall 2016.
  - Supported the ongoing re-design of the Library website (Assessment, Info Lit, AUL for User Services) and led user experience and content management for the migration (User Experience)
  - Created a website style guide < <https://publish.illinois.edu/libraryweb/>> with input from frontline service providers (User Experience)
  - Designed templates and updated content for top-level links for core services (User Experience)
  - Served on CAPT discovery working group (Info Lit) and Web Content Team (Info Lit, User Experience)
- other contributions to Library-wide programs
  - Academic staff searches - Worked with search committees conducting academic searches and served as the conduit between the Executive Committee and Library Human Resources. (Staff Development)
  - Strategic planning - Served as library-wide coordinator for the development of the Framework for Strategic Action (Info Lit), ensured that the process of developing the Framework was inclusive and representative (Info Lit) and helped to develop the process to transition from planning to implementation by the AULs. (Info Lit, AUL for User Services)
  - Served as an ex officio member of the Social Events Committee. (Staff Development)
  - Served on Staff Development and Training Advisory Committee. (Info Lit)
  - Served on the Dean of Libraries' Cabinet, the Budget Group and Administrative Council. (AUL for User Services)

**Progress made on Unit Annual Goals for FY16:**

- Supported the ongoing re-design of the Library website focused on staff (Staff Development)
- Created a toolkit for training on the GREAT customer service guidelines. (Staff Development with the Staff Development and Training Committee)
- Conducted the Ithaka S+R graduate student survey. (Info Lit)
- Reviewed student wage allocations across the Library– Done across User Service units as part of the Budget Reduction process. (AUL for User Services)
- Goals carried over from previous years:
  - Review and update the Library's service policies. (AUL for User Services) - *In Progress.*
    - Substantially revised and updated the Photographic, Video and Audio Recording in University Library Facilities policy
  - Roll out the Student training program using Compass. (Staff Development)

- Reengage a group focused on technology training issues. (Staff Development)
- Implement the Fitness Trail when the Fourth Floor is readied. (Staff Development)
- Expand use of Blackboard Collaborate. (Info Lit)

### Unit goals for FY17:

- Continue to adapt and develop strategies to meet mission-critical functions fulfilled by recently vacated positions in the Office of Services and realign around new directions and priorities. Specific goals related to this include:
  - Develop strategy for ensuring a continuing focus on user experience as a central organizing principle across all physical and virtual services and in our individual areas of responsibility. (Framework Goal 2: Ensure an integrated and coherent user experience of library services focused on user success in information retrieval and use):
    - Explore opportunities to infuse GREAT Customer Service to include online experience with website and discovery tools, way-finding and the design of physical spaces.
    - Support and contribute to the development of approaches that will systematize access to library experts and increase internal and external collaborations, including mechanisms for user requests for assistance and instructional support. (Framework Goal 2b)
    - Develop strategies to fill the integrative role of the User Experience Librarian until such time that role can be reconsidered.
    - Identify a strategy for new generation information literacy program development based on the Kellogg Foundation logic model and recommendations for phased implementation.
  - Help shape a consistent and integrated library-wide outreach, engagement, and marketing strategy. (Framework Goal 2c)
  - Develop an Office of Services program statement guided by the Framework for Strategic Action and directions recommended by the Office of Service unit heads and the User Services Leadership Team.
- Act on recommendations from the ClimateQUAL survey and the follow-up on the Framework for Strategic Action to address opportunities to improve the organizational climate and empower staff, as detailed in Appendix 3. (Framework Principle: Empowering)
- Continue the Learning Analytics project and explore ways to assess how the library contributes to student success and deepen connections with campus partners. (Framework Principle: Mission-Focused, User-Focused and Evidence-Based)
- Partner with the University of Minnesota and University of Wisconsin libraries to host a regional liaison institute to explore changing liaison roles and develop strategies for deepening engagement with teaching and research on campus and serve as this as a launching point to define specific strategies and next steps. (Framework Goal 2d)
  - Continue to support efforts to ensure that students, faculty, researchers and staff on campus are aware of the full range of services and expertise available, including the development of improved online “wayfinding” for experts and robust outreach and strategic communications efforts.
- Develop opportunities for greater involvement at the campus and consortial levels in issues that impact user services.
  - Seek opportunities to develop new partnerships and strengthen existing partnerships with campus groups involved with teaching and learning such as CITL and including opportunities arising with the formation of the Design Center and an increasing emphasis on experiential and service learning.
  - Support and develop partnerships with student support services, recruitment officers, general studies programs, etc. that may emerge for the learning analytics initiative.
- Consolidate data collection for user services functions on a single platform. (Framework

Principle: Evidence Based)

- Investigate consolidating platforms for scheduling, managing, and reporting on staff and user events. (Framework Principle: Evidence Based, Empowering)
- Provide detailed reports/analysis from the Ithaka graduate student survey to support application of data to decision making in library units. (Framework Principle: Evidence Based, User Focused)
- Update and re-organize the Office of User Services website as part of the CMS migration

**The number of GAs (FTE and Head Count) employed during FY16:**

One .35 FTE Graduate Research Assistant for Assessment

One .25 FTE Graduate Assistant for Information Literacy

**The funding source for the unit's GAs:** state funds

**The major responsibilities assigned to the GAs in the unit, and an overview of the contributions made (or projects completed) by GAs during the fiscal year.**

- Research and adopt new research methods and software tools for assessment.
- Disseminate assessment results to the Library and maintain the Assessment @ Illinois website.
- Conduct surveys, focus groups or usability testing.
- enhance the Library's virtual instruction infrastructure by developing LibGuides training materials and by providing one-to-one support and training for the Library's implementation of Blackboard Collaborate.
- Work with the User Education Committee on projects.
- Develop and maintain the information literacy portal website.
- Provide planning, implementation, and follow-up assistance with events such as the Library Retreat.
- Draft and edit information literacy policy, process, and procedure documents.

## II Statistical Profile

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### 1. Facilities – *Not Applicable*

### 2. Personnel

**List, by name, all faculty, Academic Professionals, civil service staff, and Graduate Assistants assigned to the unit in FY16.**

- Suzanne Chapman, User Experience Librarian, 1.0 FTE (faculty) – August 2015- June 17, 2016
- Lisa Hinchliffe, Coordinator for Information Literacy Services and Instruction, 1.0 FTE (faculty), July 17, 2002-present
- JoAnn Jacoby, Associate University Librarian for User Services, 1.0 FTE (faculty), October 5, 2015, -present
- Beth Woodard, Staff Development and Training Librarian, 1.0 FTE (faculty), part time from November 21, 2002 to August 16, 2012; full time August 16, 2012-present.
- Crystal Sheu, E-Learning Specialist, 1.0 FTE (academic professional) – December 16, 2015 - July 25, 2016
- Jen-chien Yu, Coordinator of Library Assessment, 1.0 FTE (academic professional), August 2012-present
- Zoe Revell, .5 FTE (civil service), August 16, 2012 in OUS-present

Graduate Assistants

- Emily Justiss, .355 FTE (graduate assistant for assessment), August 2015-present
- Anna Lapp .25 FTE (graduate assistant), August 2015-present

- Specify the amount of the unit's FY16 Student Assistant wage budget and Student Assistant FTE. – *Not Applicable*

### 3. User Services

Most of the following data has been generated by the Office of User Services and is available at G:\StatsForAnnualReport2016.

- Gate Count– *Not Applicable*
- Circulation– *Not Applicable*
- Reference interactions – *Not Applicable*
- Presentations (from the Instructional Statistics database)
  - o Number of presentations to groups – 6
  - o Number of participants in group presentations - 46

### 4. Other statistics (optional)

Units may report any additional data that is collected within the unit and is illustrative of its activities in FY16. Examples might include website analytics, training sessions provided within the Library, LibGuides usage, tallies of materials processed or transferred, and so on.

#### ***Graduate Assistant Training and Orientation***

- Fall 2015 GA training and Orientation
  - o 48 new graduate assistants attended the general orientation with many attending most of the 25 offered sessions
  - o As many as 5 people, including staff and librarians attended sessions on the reference referral database and Finding Articles: Introduction to Easy Search, SFX, the Journal and Article Finder, and PRIMO
- Spring 2016 GA training and Orientation
  - o 6 new graduate assistants and librarians attended the general orientation sessions, with the majority attending the 19 offered sessions.

## **III Appendices**

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### **Appendix 1 – Information Literacy and Instruction Activities - Highlights, FY16**

- Met one-one with each new librarian and AP who has teaching responsibilities. Typically lasting at least one hour, each meeting includes policy orientation as well as procedural and technical training.
- Provided one-one instructional design consults as requested by librarians designing instruction sessions, adopting new pedagogical practices, etc. Arranged for subscriptions and common viewings of relevant webinars
- Facilitated a discussion for librarians who have attended information literacy conferences to share their experience and the impact it had on their professional practice.
- Worked with Library IT and the Web Team to provide input and feedback for Gateway re-design.
- Provided information about campus opportunities for professional development to the Library (e.g., EdTech Brown Bag series, the Annual Faculty Retreat).



## Appendix 2 – User Education Committee

### **Topics and Projects, FY16**

- Providing input on instructional spaces and equipment.
- Support and development of LibGuides and other instructional materials.
- E-Learning and Blackboard Collaborate.
- Website re-design.
- Insights from conference sessions – LOEX, Illinois Information Literacy Summit.

### **User Education Budget Expenditures and Possible Projected Needs:**

The User Education Budget consists of \$19,800 in funding to support information literacy program development. The bulk of the funds are allocated to supporting engagement with state, national, and international information literacy initiatives. More detailed budget tracking will be undertaken starting in 2016-2017 as the coding in Banner was discovered to be less informative than expected; however, in 2015-2016, approximately \$14,000 was allocated to support an estimated 10 individuals. Those individuals brought back lessons learned, suggestions for improvement, etc. and shared their experiences at the User Education Committee, in their units, in their division meetings, etc. In addition, the User Education budget supports software purchases and purchases of web-based services (e.g., LibApps). The total spent on these in 2015-2016 is approximately \$2000, but again more detailed tracking will be undertaken going forward. The information literacy program development funding supports several Strategic Framework Principles (Action-Oriented, User-Focused and Evidence-Based).

There has been discussion of upgrading the Library's subscription to LibGuides to LibGuidesCMS to serve the needs of the website/integration with WordPress. If this occurs, additional funds will be needed. Likewise, additional one-time and ongoing funds may be needed to migrate from the library instruction statistics databases if we consolidate on a single-platform for user services data.

### Appendix 3 – Staff Development and Training Events, FY16

In addition to the Supervisory Training Institute Sessions where 15 individuals attended sessions on DiSC, managing change, creating a good working environment, and providing feedback, other sessions were also offered, as listed below. Attendance is noted when available.

#### **Workshops for supervisors:**

A series of discussions around the GREAT customer service guidelines:

- Coaching for GREAT Customer Services, 16 participating
- Managing for GREAT Customer Services
- GREAT Customer Service Recovery, 10 participating
- Managing Meetings with Jan Ison, 7 attending
- DiSC workshops for Technical Services (2 Sessions), 33 in one session, 13 in the other
- Open DiSC workshops, 14 attending

#### **Face-to-face sessions:**

- Voyager Acquisitions & Voyager Cataloging

#### **Webinars at hosted locations in the library (75 offered, up from 34 the previous year):**

August 12	NCRS Accessing DataSets for the Data Curious (free)
August 12	ALA How to run great webinars (free)
August 18	Data for the Non-Data Librarian
September 9 and 16	Tableau Public: A Webinar Series for CIC Library Professionals (Jen Yu)
August 26	Cataloging Music Audiovisual Materials Using RDA \$180/.00
September 7	Choice Text and Data Mining Library Content
September 30	Cataloging Music AV Materials using RDA
October 1	What does a trade agreement have to do with Libraries and copyright?
October 6	LITA Teaching Patrons about Privacy in a World of Pervasive Surveillance: Lessons from the Library Freedom Project, with Alison Macrina \$196.00 (Jen Yu)
	Ready, Set, GO: Making the move from FirstSearch to WorldCat Discovery
	<i>Stories of Inclusion: Inclusive Practices at Cultural Institutions.</i>
October 7	ADA at 25 and Universal Design at Cultural Institutions
October 14	Responding to Visitors who are Deaf, Hard-of-Hearing, Blind or with Low Vision
October 28	Responding to Visitors with Cognitive, Developmental and Emotional Disabilities
October 20	Choice Faculty Perspectives on Publishing Open Access (free) Aaron McCullough
October 7	LITA Creative Commons Crash Course, with Carli Spina \$196.0 (Zoe Revell)
October 14	Pinterest for Libraries: Building Community Through Social Media
October 20	LITA Digital Privacy Toolkit for Librarians, with Alison Macrina \$196.00 (Melody Allison)
October 20	Faculty Perspectives on Publishing Open Access
October 22	How to Assist Researchers in Sharing their Research Data
November 2	LITA Top Technologies Every Librarian Needs to Know – 2, with Steven Bowers, A.J. Million, Elliot Polak and Ken Varnum \$196.00 (Beth Woodard)
October 14	Tech Soup Pinterest for Libraries: Building Community Through Social Media (free)
October 20	Making the Case: Spaces that Prepare Students for Productive and Meaningful Lives (free)
October 28	Introduction to Music Medium of Performance and Genre Vocabularies 162.00
October 22	Elsevier How to assist researchers in sharing their research data (free)
October 28	NISO October Virtual Conference: Interacting with Content: Improving the User Experience (\$245)(Suzanne Chapman hosted; AUL for User Services funded)
November 2	Top Technologies Every Librarian Needs to Know
November 12	Elsevier Article, author and journal metrics: what librarians need to know (free)
November 12	LLAMA Thought Leaders
November 12	Power Searching
November 16	Research Data Metrics Landscape
November 18	LLAMA Webinar Provides Tools, Tips and Tricks for Management Success (\$199)
November 18	Hop on the Energy Bus: Best Practices to Building a Positive Winning Team
October 27	LIRT Surveying the Terrain: Unfamiliar Landmarks, Changed Understandings
November 10	Grounding Our Adventure: Definitional Alignment as Our Terra Firma
November 18	NISO Text Mining in Libraries: How Librarians Develop Skills Required to Support This Evolving Form of Research (\$125)
November 18, 2015	Hop on the Energy Bus: Best Practices to Build a Positive Winning Team and Organization Wiley (free)
November 24	Taking a Practice Trip: Three Problems, Three Solutions
December 2	Tactics for Time Management and Organizational Skills
December 8	DataONE search: A New Way to Discover Data
December 9	NISO Emerging Resource Types Part 1: Large Data Sets
December 9, 2015	LITA Privacy in the Surveillance Age: How Librarians Can Fight Back.(free)
December 9	(LLAMA) "Create Your Future: A Transformative Goal Setting Workshop," \$239

Dec 10	CARLI Framing the Big Picture of Library Instruction (Writing student learning outcomes using the Framework for Information Literacy with Deb Gilchrist)
December 16	NISO Emerging Resource Types Part 2: Equipment that Supports the Present and the Future
January 10, 2016	The Change the Culture, Change the Game Webinar
January 27, 2016	Technology Training for Library Staff: Effective and Engaging Training Programs
January 25, 2016	Theory and Standards: Debating the New Framework for Information Literacy in Higher Education
Feb 3	The Social Science Division has scheduled a webinar orientation to the Inter-university Consortium for Political and Social Research (ICPSR)
February 9	NFAIS webinar on "Advances in Peer Review" Harriett Green, host
February 10, 2016	The Change the Culture, Change the Game Webinar
February 10, 2016	The Start-Up Effect: How Startups are Changing the Culture of Scholarly Communication
February 11, 2016	Product Name: Letting Go of Legacy Services: Weeding Materials and Programs
February 11, 2016	WebJunction event, 2016 Knight News Challenge on Libraries
February 12	Managing with Data: Using ACRLMetrics and PLAMetrics with Peter Herson, Robert E. Dugan, and Joseph R. Matthews
Feb 17	(LLAMA) "Keeping it Green: Strategies for leading online teams,"
March 3	Tips for ACRL 2017 Proposal Submissions
March 10	Enhancing Research Through Government Documents
March 16 and 23	NISO Two-Part Webinar: Privacy Part 1: What Data is Being Collected and By Whom? Part 2: Understanding Privacy Policies
March 31, 2016	Fostering research Community through library spaces and services
March 23, 2016	Digital Literacy Training Tutorials for Libraries
March 31	Fostering Research community through library spaces and services
April 13	NISO Webinar: Supporting Women and Minorities in Technology
April 25	ACRL Presents: A Shared Language: Threshold Concepts in Writing Studies
April 27	How to Engage Your Leadership on Engagement!
May 4 -	NISO Webinar: Supporting Research On Your Campus
June 7 and 14	Mindful Tech: Establishing a Healthier and More Effective Relationship with Our Digital Devices and Apps
May 4	Exploring Online Student Engagement: Encouraging Active Learning at a Distance
June 22	SPEC Survey Webcast on Supporting Digital Scholarship
July 7	ALA Tech Wrap UP 2016
July 27	How to make your website more inclusive to all audiences
August 10	How Librarians Use, Implement, and Can Support Research Identifiers
August 4	The Academic Library's Role in Promoting the Open Access Monograph, hosted by Aaron McCullough

#### Wellness program components:

- Seated chair massages (paid by individuals with the unit paying parking for the provider) on a monthly basis with sessions being offered twice a month in many months. 144 people took advantage of this opportunity this past year.
- A "passport" project that encouraged individuals to visit other libraries, with 70 participants and 21 people going to ALL locations, and many more participating
- Blood drives in October, January, April and July, with 66 people participating
- Mindfulness in the Workplace
- Chair Yoga
- Positive Strategies for Managing Stress, 10 participants
- Color me Calm
- Money Smart Week activities, including
  - Money Hacks
- Pedometer challenge, April 2016, 29 teams, 122 participants
  - Created a LibGuide for the pedometer Challenge
  - Scheduled and recruited hosts for 7 hosted walks and 4 themed walks (an art and architecture walk), a bird walk and a tree walk.
- Safety training, including
  - How to Respond to Security Threats, 44 participants
  - Fire extinguisher training, 36 participants
  - Verbal judo, 42 participants
- 3 Minutes to Live, 30 participants
- Greatly expanded the *Growing People Blog* contributions under the editorship of Zoe Revell. Content includes interviews with new and experienced staff, announcements of award recipients, tips on computer security, health and wellness, and much more.

## Staff Development and Training Budget Expenditures 2015-2016

Staff Development and Training provides orientation and training for library graduate assistants, supports undergraduate student training through the use of a COMPASS course, and provides training and support for group learning. Individual request for attendance at workshops and courses are generally not funding through staff development. The majority of this past year's budget went to support supervisory training (Learning Alliances) and webinar registrations. The lack of consistent application of codes and lack of ability to see specific items paid under each category continues to make it difficult to monitor the budget administered for training. Library IT has difficulty making Banner open on staff machines in the unit, so it is difficult to know what is specifically included.

Office Supplies	362.04
Educational supplies (Books; DiSC inventories, videos)	2,784.08
(Includes subscription to <i>Communication Bulletin</i> for \$432.00)	
Printing (GA Manuals)	1,350.48
Copying (GREAT customer service)	110.18
Webinar registrations	3,659.00
Parking	620.00
Shipping	27.33
Learning Alliances (Supervisory and GREAT)	11,269.81
Jan Ison (Meeting Management)	400.00
	<b>20,582.92</b>

### NOTES on last year's budget:

- Pedometer Challenge is separate, \$2,000 last year
- The AUL for User Services provided separate funding for Zoe Revell to attend DiSC training this summer.
- We did not hold CPR training this year. Because CPR trainers have to be licensed, this is now a bidding process.
- Retreat costs do not come out of this funding.
- Zoe Revell also was successful in getting a Marketing grant for \$500 for GREAT this year.
- The AUL for User Services paid for initial printing costs and purchase of Comment boxes for the GREAT Customer Service initiative.
- If the last invoice for Learning Alliances for \$1,909.71 was paid, then we overspent by over \$500. If the last invoice was NOT paid, then we were underspent, but those funds will have to come out of next year's budget.

### Projection and Needs for FY17

We are already committed to the Learning Alliances contract for over \$11,000 for supervisory training, for \$1,000 for sending staff to Reaching Forward South, and possibly \$1,200 for a two-day project management workshops. Given those commitments, and the growing demand for webinars from all areas of the library, Staff Development and Training will be hard pressed to meet all the demands this coming year.

## Staff Development and Training Goals for 2016-2017

1. Needs assessment. It has been several years since we have conducted a needs assessment, but with ClimateQual, the retreat and subsequent discussions it seems prudent to follow up on needs identified there and plan for a needs assessment survey in the next year or two.
2. ClimateQual Recommendations
  - a. Promote open, honest and authentic communication
    - 1) Communication—Beth is meeting with advancement and Cabinet on regular basis
    - 2) Internal marketing plan—Beth will work with cabinet (Senior Management Participation, Integrated organizational structure, strategic marketing approach, human resources partnership, focus on employee engagement, internal brand communication)
    - Corporate giving—encouraging mentoring in schools
    - 3) Holistic approach to wellness—see Wellness goals below
  - b. Strengthen recruiting and retention
    - 1) Work with Diversity committee to encourage recruitment to library profession
    - 2) Internships for people from under-represented groups

Beth is working with a group from EC to develop mentoring training and internship strategies for a Residency Program

3) Explore the possibility of instituting exit surveys for staff from underrepresented groups that have left

- c. Explore ideas for diversity training with Diversity Training
  - 1) Cultural competencies
- 3. Retreat Follow-up
  - a. Project Management—exploring options on campus and with iSchool
  - b. Cross Training –would need major support from administration  
Job shadowing would also encourage community
  - c. Training in Library and Service Skills Aimed at New Employees—strategize ways to get people to use the orientation checklist and guarantee consistency and investigate other ways to more systematically welcome and orient new employees
  - d. Training Aimed at Library Academic Staff to Integrate New Services into their Skill-Sets—developing train the trainer programs to utilize local expertise
- 4. GREAT customer service
  - i. Follow up training for IT
  - ii. Development of more options
- e. Wellness activities
  - i. Stress management
  - ii. Encouraging physical activities
  - iii. Encouraging community building
  - iv. Financial management to reduce stress

#### **Appendix 4 – Major Statistical Reports and Surveys Completed by Library Assessment**

- Statistics for library unit annual reports [G:\Annual Report Stats]
- Visualizing library data using Tableau [<http://go.library.illinois.edu/tableau>]
- ClimateQUAL® [<http://library.illinois.edu/assessment/climatequal/>]
- Ithaka S+R Graduate Student Survey (led by Lisa Hinchliffe) [  
<http://www.library.illinois.edu/cms/assessment/libsurv.html#ithakagrad>]
- Ithaka S+R Faculty Survey [<http://www.library.illinois.edu/assessment/ithakasurvey>]
- LibQUAL+® Lite [<http://www.library.illinois.edu/assessment/libqual>]
- Association of Research Libraries (ARL) Annual Survey
- IPEDS Academic Library Survey (previously NCES)
- Strategic Planning Metrics (previously Campus Profile collected by Divisional of Management Information)

#### **Library Assessment Committee Budget Expenditures:**

The Library Assessment Committee, chaired by the Coordinator of Library Assessment, administers a grant program which has a fund of \$10,000 each year (recurring, ICR Funds). A list of grant recipients over the years can be found here -<http://www.library.illinois.edu/assessment/grant.html>. This program supports all full-time library faculty, AP and civil service staff to take on assessment projects and apply the assessment data to improve library services and operations. This grant program is supporting several Strategic Framework Principles (Action-Oriented, User-Focused and Evidence-Based).