

A Framework for Access Services Librarianship: An Initiative Sponsored by the Association of College and Research Libraries' Access Services Interest Group

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Introduction

This framework is a culmination of a three-year effort by Access Services professionals¹ across the United States to define and describe a framework for Access Services librarianship. The ACRL Access Services Interest Group, established in July 2016, produced this work through a multi-step process that began with discussing and drafting a charge (Appendix A). After group discussions at ALA Midwinter in 2018, the IG identified four primary sections for the framework². Subsequently, the group established four focus groups with seven members each chaired by volunteers to address each section. Unedited drafts from each focus group were submitted for additional review and discussion at ALA Annual in 2018, and through the ACRL Access Services Interest Group listserv. This document represents the collective work of these thirty-one individuals along with the feedback, suggestions, and encouragement from Access Services professionals across the country over the past 18 months. This framework should be of interest to academic librarians both inside and outside of Access Services as it intends to help shape, define, and explain the scope of this branch of librarianship as it continues to provide essential services and oversight of core library functions in 21st century college or research libraries. While the concept of Access Services is not new, this framework stands on the works of several individuals, groups, and reports submitted over the last 25 years and is hoped to bring a concrete framework to bear that will continue to build upon, expand, and greater define this specialization for the foreseeable future. This report is faithfully submitted by:

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¹ For the purpose of this document, Access Services professionals refers to a broad range of roles including librarians, managers, para-professionals, and support staff.

² Definition; Competencies; Marketing; Professional Engagement

Section 1: Definition of Access Services

“Access services is essential, fundamental and pervasive” (Krasulski & Dawes, 2013).

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1.1 Introduction

The field of Access Services is difficult to define and has a scope that often comprises many areas, programs, and services located in a multiple broad areas of academic library services and programs. This section seeks to define Access Services both specifically and broadly. *Specifically*, to chart the traditional and the new areas of work that are often covered by the Access Services umbrella. *Broadly*, in an attempt to provide a succinct statement that can apply across institutions and over time. This section starts by exploring the brief history of Access Services and reviewing the literature. It ends with recommendations.

1.2 History

From the foreword to *Twenty-First-Century Access Services: On the Front Line of Academic Librarianship* (2013), James Neal writes about his experience as Assistant University Librarian at Pennsylvania State in the mid-1980s, and the creation of their Access Services department.

“I recognized the need to bring together the essential but disparate services that enabled our students and faculty to obtain collections, make use of technologies and spaces or take advantage of services provided by the libraries. This early deployment of an Access Services department, in a largely predigital period, addressed the persistent and pressing importance of core user support. The “usability” of the academic library had entered the professional vocabulary, and a focus on “human” objectives like user success, happiness, productivity, and impact, had become more fundamental to library mission.”

Imagine this scenario playing out in libraries across the country, and you have the birth of Access Services.

Thomas Schneider, in his article *Does Access Services Have a Future* (2002), echoes the thought that Access Services grew from a change in focus within academic libraries. Outside the library world, the importance of the service industry and the emphasis on good customer service was expanding.

Expectations had changed so the library needed to change as well. The library as merely a collection of resources was no longer enough.

Hinting at the “need,” Neal mentions, Schneiter points to the gains offered by consolidating the management of several units (i.e., circulation, reserve, stacks) that did not neatly fit under reference. Reduced staff cost was one need met, replacing multiple unit heads with one department head. Another was a more cohesive team, charged with improving and supporting patron access (2002).

From this start, the work of Access Services expanded rapidly to include other existing services and new ones as well. In 1991, shortly after the time period Neal is writing about, the Association of Research Libraries (ARL) did a survey of ARL libraries on the subject of Access Services, and 76 libraries responded. The majority reported that over the last five years the areas of responsibility that fell under Access Services had increased.

Several core services were identified: circulation, stacks maintenance, course reserves, billing, and library security. To this list was added current periodicals, interlibrary loan, photocopy services, microforms, campus delivery, and a general information desk (Steel, 1991). Repeated in 2005, the ARL study showed the addition of even more new services like technology lending, electronic reserves, service to distance learners, and remote shelving (Dawes, et al., 2005).

From the same studies, the evolution of the name “Access Services” is seen. In 1991 40% of the 76 libraries surveyed had a department that included the word “access” (Steel, 1991). In 2005, 81% of surveyed libraries used the term “access”. (Dawes, et al., 2005).

1.3 Literature Review

In 2002, the *Journal of Access Services* published a Q&A with five members of their editorial board. They were asked to define Access Services in 100 words or less. The most succinct definition took only eleven: “Every library activity related to giving users access to relevant information.” Another response pointed to the focus on ensuring and extending access to information. This includes providing a secure environment under the category “ensuring” (Hanson, et al.).

When asked what common concerns linked the variety of services of and units within Access Services, the focus on the customer or patron was primary. “Each activity within Access Services has responsibility for both direct customer contact and behind-the-scenes activities that support the services offered, and staff must be able to operate well in both environments” (Hanson, et al., 2002).

One concept that came up several times in the literature is the idea of Access Services as a bridge or intermediary between the patron and technical services (Hanson, et al., 2002), or the patron and the library as a whole. It is the public face of the library, the first line of contact (McCaslin, 2009).

Regarding specific tasks included under the umbrella of Access Services, it helps to go back to the 2005 ARL study. Of the 77 respondents, all of the following areas were mentioned as being a part of Access Services by at least some of the surveyed libraries:

- Circulation
- Stacks maintenance and shelving
- Billing
- Security
- Entry/exit control
- Reserves (print and electronic)
- Interlibrary loan
- Document delivery (on campus and to distance learners)
- Circulating technology
- Remote shelving ingest and retrieval
- Disabilities services
- Printing and photocopying
- Facilities
- Lockers and study rooms
- Preservation
- Information desk

1.4 Specific Recommendations

The following programmatic areas and services are common in modern Access Services departments. This section is not a detail of the skills and competencies necessary for performing or overseeing this work; there are, however, bracketed notations to the competencies in Section Two listed as appropriate.

1.4.1 Assessment and Quality Control

Assessment and quality control in an Access Services context involves collecting data about how library spaces and collections are used, then looking at the data to make informed decisions. This can be a collaborative endeavor that includes other departments within the library (like technical services and reference) and beyond (campus security, administration, etc.). Some examples of metrics frequently collected and analyzed include gate counts that inform decisions about hours of operation, circulation statistics that help answer questions about collection development and weeding projects, patron demographic information used to tailor services to a specific population (i.e. “Do we serve primarily staff or students with X service and how could we make it better for them?”), and library charges which can be broken down into subsets leading to a review of policies. [2.2.1]

1.4.2 Circulation

Circulation is a primary area of Access Services and involves a broad range of duties related to helping patrons access resources and understand related policies. Broadly, Access Services is responsible for checking out items to patrons and checking them back in when they are returned. Items are also reviewed for damage and completeness at the time of return. Staff work with patrons during these transactions to understand the policies related to checking out any particular item, such as the loan period, overdue fines, and responsible use of the item. Physical items such as books, media, and equipment (laptops, cameras, charging cords, etc.) are circulated as well as items related to spaces and

access like lockers, computer logins, or study rooms. Any resource that is managed, tracked, and available for a specified period of time can fall under the purview of circulation. [2.2.5]

1.4.3 Course Reserves

The course reserves service involves managing and providing access to a collection of materials identified as important for students taking particular courses. Because the items are in high demand and a finite resource, course reserves usually have a short loan period compared to other collections (e.g. hours instead of days). These items can be physical items like textbooks, articles, DVDs, anatomical models, equipment, or slides, or they may be electronic documents, which adds a different set of tasks to providing this service. Items may already be owned by the library, purchased specifically for adoption as a course reserve, or loaned to the library by instructors or departments on a temporary basis. Staff track the life cycle of the items on reserve, physically process items in and out of the collection, and manage the associated bibliographic records for the items. They communicate with the instructors or departments during this process to make sure the right resources are available for students at the right time. For electronic reserves, there are the additional technical tasks of creating, storing, and delivering digital content to users. Copyright management is another component of this service, and staff must consider copyright laws and fair use policies when managing content on course reserve. [2.2.2, 2.2.5]

1.4.4 Document Delivery

Document delivery is a service that provides enhanced access to materials held in the library and usually involves the scanning of journal articles or book chapters for use by library patrons. A patron can request a specific selection, usually using an automated request system, and library personnel will create a usable file that is shared with the patron electronically. Document delivery services may be especially helpful for users of libraries with remote collections, distance education patrons, or multiple branches, where electronic delivery is faster and easier than physical retrieval and delivery. [2.2.2]

1.4.5 Facilities Management/Accessibility

Facilities management is an important focus of Access Services departments. Managing the day-to-day operations of the library includes maintaining physical collections, reserving discrete spaces to patrons, and being present to answer whatever questions may arise. Maintaining facilities includes reporting maintenance issues, receiving and following up with feedback on the facility, understanding how physical space is used and meeting needs as best as possible, and liaising with library and campus maintenance departments. [2.2.6]

1.4.6 General Public Service

Library patrons often ask their questions at the first desk they see, and usually that desk is an Access Services desk; further, many patrons understand that libraries are places that hold information and so will ask general questions at library desks. Because of this, Access Services staff must have a sufficiently thorough understanding of services and resources available throughout not only the library, but also the institution and often the community, to effectively interpret questions and determine whether to answer or correctly refer the question, or both. Answers may require skills in empathy, instruction, technology troubleshooting, internet searching, and code-switching between formal or colloquial languages. [2.2.5]

1.4.7 Interlibrary Loan / Resource Sharing

Interlibrary Loan (ILL) is the process by which libraries share materials with each other, based on specific patron needs, in order to supplement local library collections. Access Services personnel may be tasked with multiple steps in this process, including on the lending side: retrieving requests from an automated system such as OCLC Resource Sharing or Rapid ILL; determining availability and location information for each item; pulling items from the shelves; scanning appropriate selections; creating usable files and uploading them to the resource sharing system; and updating records in the automated ILL system. On the borrowing side, Access Services personnel may be tasked with multiple steps in the process including: reviewing patron requests; verifying citations if needed; determining possible lenders based on a variety of considerations; submitting the request in an automated ILL system; receiving the material; delivering the material or making it available for pickup by the patron. Knowledge of local policies and procedures, systems operations and customization, ILL guidelines and best practices, and copyright law as it applies to resource sharing, may all be required. [2.2.5]

1.4.8 Marketing / Outreach

Access services personnel should be aware of all services provided by the library in order to answer questions, promote services, and educate users. Questions may include where to find an item, where a specific space is located, or where to find a reference librarian. Personnel may also be charged with creating handouts, posters, or other marketing materials to enhance promotion on the front lines. As Access Services employees are often the first individuals users interact with, personnel have a great opportunity to educate users about all the library offers, from promoting interlibrary loan services to making suggestions for collection purchases to taking in feedback on what events or services in which users are interested. This area of work is fully explored in Sections Two and Three. [2.2.5]

1.4.9 Off-Site or Remote Shelving

To alleviate overcrowding of books and people, libraries move parts of their collections to a remote location. Often, Access Services is responsible for managing this space. They handle the initial ingest and shelving of items into the off-site facility. They also provide access to the materials by scanning needed articles or delivering needed books to the main campus. It is inconvenient for patrons to have library materials moved off-site. It is the job of Access Services to mitigate this inconvenience by providing prompt retrieval and delivery. [2.2.1]

1.4.10 Patron Accounts Management

Many of the functions performed by Access Services require an up-to-date database of library patrons. Each patron account in this database is used in numerous ways. For example, it governs what items a patron can check out and for how long, which patrons can access certain online reserves, and which patrons can use interlibrary loan. In some instances, the patron account determines what access the patron has to the library's online resources such as journals and databases. Often, the Access Services department works with other campus entities such as the registrar to maintain the accuracy of this patron database. [2.2.2]

1.4.11 Security/Emergency Management

Because Access Services departments are likely to be open all or most of the hours the library itself is open, staff are likely to be points of contact for emergency or security incidents. While some libraries have dedicated security staff all of some of the time (in which case that staff takes on these duties),

when there are not security staff, Access Services staff must respond to injuries, thefts, disputes, and a variety of other urgent situations by interfacing with police or other campus or security entities, managing patron concerns, and determining whether and when to close all or part of the library. Managing such incidents may require skills in conflict resolution, factual reporting of events, and first aid/CPR, as well as attention to detail and capacity to remain calm. [2.2.4]

1.4.12 Space Management

The Access Services department is often involved in coordinating the use of different spaces within the library building, such as conference rooms, classrooms, and study rooms. This involves developing policies related to proper use of the rooms and procedures for making reservations for the rooms. The access services department also facilitates access to the spaces when groups who have reserved them arrive in the building. Employees in access services are often involved in maintaining the amenities in each space, such as furniture and technology. [2.2.6]

1.4.13 Stacks Maintenance

Stacks maintenance is the process of keeping materials on the shelves in order and usable for patrons. This includes shelving materials in the correct place, monitoring growth patterns, maintaining adequate space to shelve new acquisitions, shifting materials as new growth patterns emerge, regularly reviewing the shelves for correct order, and making recommendations or determinations about areas which may soon outgrow space in order to embark on a weeding strategy. It may also include retrieving materials from the stacks for other processes, and considering areas or items for reassignment to a different shelving location. [2.2.1]

1.4.14 Student Management

While many departments in the library utilize student employees, the access services department is often the most dependent on student employees to keep their operation running, and often employs the largest number of student workers. Student employees in access services perform functions such as checking in and checking out library materials, shelving materials, facilitating access to materials and spaces throughout the library, answering the phone, and answering questions pertaining to library services and resources. Access services department employees coordinate the hiring and onboarding of new student employees, make schedules for circulation desk coverage, and track shifts worked by student employees for payroll purposes. [2.2.3]

1.4.15 System Management

Access services departments may work with systems departments to ensure efficient use and workflow of library technologies. Understanding the various technology interfaces needed for the day-to-day operations of the department (e.g., Integrated Library System (ILS), interlibrary loan management system, course reserves system, library website) benefits both the staff and users. [2.2.2, 2.2.5]

1.4.16 Wayfinding/Signage

An important aspect of facilitating access to library services, materials, and spaces is signage. Access services employees may help design, print, and post signage, sometimes with assistance from the campus marketing department, to assist patrons in locating services, materials, and spaces within the library building, as well as hours for both the building as a whole and for particular services. [2.2.6]

1.5 The Broad View

Early on in this project, Section 1 task force members were asked for first thoughts concerning their charge to define Access Services. The following responses illustrate the challenge of defining and the need to define Access Services:

“I think one of the beauties and the challenges (and possibly the disasters) of the phrase “access services” is that we’ve chosen to call ourselves this incredibly broad name. Is there anything which users want of the library which is not a matter of access?”

“Everything is a matter of access from the library user’s perspective - access to resources, services, spaces. They should not need an intimate knowledge of how the library works in order to get what they need. The task of access services is to fill that need. We are never the ones to say “I’m sorry, you’re in the wrong department.”

So then, what is Access Services? It’s a moving target, not only over time, but from institution to institution. Yet there is commonality. Access Services grew from a desire by libraries to improve the patron experience. Whether it’s front-line circulation or behind the scenes stacks maintenance, Access Services is about making this patron experience the best in can be. Any definition should highlight this.

1.6 A Definition of Access Services

Access Services develops and provides services that connect library users to library resources. Access Services is the primary point of contact for library users. It strives to make the library user’s experience positive and rewarding.

Section 2: Competencies for Access Services Librarians and Managers

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2.1 Purpose

The purpose of this section is to articulate recommended skill sets, training, and best practices for effective management by Access Services librarians and managers. This articulation is of particular interest as librarians and managers in this area are often in a unique situation overseeing complex back-end operations and time-sensitive public service desks with myriad staffing types and levels. In addition, Access Services librarians and managers are often managing front-line services in support of the use of non-traditional collections and services such as media equipment, maker spaces, and technology. Access Services librarians are also collecting data and providing feedback on collection metrics, facilities usage, and assessment initiatives.

2.2 Competencies

Just as the programmatic areas of Access Services are broad, diverse, and changing, so too are the skills needed for successful practice. In addition to core areas such as circulation and stacks maintenance, Access Services is increasingly involved with new services and spaces (see Section 1). All of these areas call upon different management and leadership skills and knowledge, as well as personal attributes and traits. This is not a comprehensive list of Access Services responsibilities and related competencies, nor is it exclusive. Each library is different, but the intention is to cover major commonalities.

2.2.1 Collections and Stacks Management

This area involves managing or working with other library groups to manage activities relating to the maintenance of the library's physical collections, such as shelving and shelf-reading, inventory projects, or large-scale shifts. These activities are frequently a core responsibility of Access Services.

- **Ongoing Collection Maintenance** - Maintaining a library's collections is often the responsibility of Access Services, and managers must have the ability to oversee or coordinate with other library staff to ensure the collection is properly maintained. This may involve shelf reading to confirm items are in their correct location, as well as scanning for and attending to damaged materials (e.g., mold,

pestilence). Maintenance also entails attending to the condition of shelving for the purpose of supporting both access to and preservation of collections.

- **Shift Project Management** - Collection relocation projects are a challenging yet common aspect of work at most academic libraries. Access Services managers must have the spatial abilities to determine current and future collection space needs (to include special formats such as microforms, maps, or special collections), the project management skills to estimate time and staffing needs, and the problem-solving skills to revisit and recalculate variables during projects, something of particular importance to what is frequently an imprecise process. Budgeting (for staff, for supplies, etc.) also comes into play for such projects.
- **Data Gathering** - Given the importance of circulation and acquisition trends to space planning, Access Services managers must have the ability to generate or to work with others to pull reports from an ILS or other key enterprise systems as a means of supporting decision-making.
- **Long-Term Planning** - In addition to routine collection shifts, Access Services managers must have the ability to anticipate and plan for complex projects, which may include offsite facilities, transitional or swing space, and considerations involving everything from preservation needs to access and retrieval strategies. Providing oversight for all aspects of these projects is unlikely to be the sole purview of Access Services, but understanding the issues and working with colleagues to successfully plan for such projects is key.

2.2.2 Leadership

This area involves providing for or influencing the direction of the department and bringing people together to work towards a common goal. This subsection is heavily influenced by the Library Leadership and Management Association's *14 Foundational Competencies* and its emphasis on knowledge, skills, and abilities that are applicable to different settings as well as different career stages. Access Services skills are emphasized where appropriate.

- **Communication** - Access Services interacts heavily with library users and other library staff. It is essential that Access Services managers demonstrate and model people skills and mental flexibility needed to handle complex human interactions and are able to remain calm under pressure. Access Services managers should be able to communicate effectively using multiple methods.
- **Project management** - Like many areas of librarianship, Access Services managers are frequently charged to lead projects that align with departmental or organizational goals. Managers should have the ability to initiate, plan and manage core aspects of projects, ensuring that tasks are completed in a timely fashion, within budget, and in accordance with task/project parameters.
- **Budget** - Access Services budget responsibility varies with institutional setting and may involve funds for collections, staffing, facilities, or projects. Overall, Access Services managers administer the departmental budget, using funds in a manner consistent with the department's goals, following appropriate procedures, and monitoring expenditures. Skills involve the ability to communicate the mission and functions of the department and its budgetary needs, as well as to negotiate, defend, and stay within budget. Proficiency with spreadsheet and budgeting software or other tools is also key.
- **Visionary, solution-focused, and creative thinking** - Access Services managers maintain currency with new approaches to service delivery, emerging technologies, workflows, and developments within libraries and higher education. They strive to connect the "big picture" with everyday practice as well as strategic thinking and planning. They continually seek opportunities to improve practice and to address, solve, or mitigate problems. They recognize and respond to changes in the organization that impact the library.

- **Legal issues** - Access Services managers maintain currency with the legal framework that guides this area of library services to include copyright, privacy, ADA, and others areas of relevance to providing effective, inclusive, diverse, and equitable services. Managers may also require familiarity with education-related legal issues relating to FERPA, Title IX, The Clery Act, etc.
- **Service assessment and impact measurement** - Access Services managers advocate for the importance and value of the services they provide. They regularly review services for the purpose of identifying areas for improvement or enhancement. They are familiar with approaches to service assessment and use data visualization and other tools to convey assessment findings. In addition, Access Services managers are familiar with and provide data on Access Services as required by professional organizations, accrediting agencies, and other bodies. As libraries increasingly work to assess the impact of services on institutional mission and user experience, Access Services managers also review these areas.
- **Employee Engagement** - Access Services is a staffing-intensive area of many college and research libraries, frequently including professional, classified, and student staff members. Access Services managers use various leadership styles to motivate and guide staff to meet organizational goals. They appropriately delegate responsibility and encourage risk taking and creativity among staff. To support effective delivery of interconnected service areas, they are able to implement team-building techniques. They effectively promote teamwork throughout the Access Services staff and seek new activities that promote staff cohesiveness.

2.2.3 Human Resources

This area involves all aspects relating to the departmental personnel. Due to the nature of Access Services work, this area typically involves working with both staff and student employees who may cover very different functions and maintain differentiated schedules.

- **Scheduling** - Access Services frequently holds responsibility for staffing the building from opening to closing, with employees serving as a public face of the library. Access Services managers ensure that critical service points are fully staffed during library's open hours, during extended and holiday hours, and to include opening and closing the building.
- **Hiring** - Access Services managers effectively manage the work of others including recruitment, training, evaluating, and managing performance. They often serve the role as the chair of hiring committees responsible for vetting, interviewing, and selecting new staff.
- **Training** - Access Services managers understand that new staff members require sufficient training in order to effectively perform their job duties and to ensure consistent and equitable provision of services. Additionally, they ensure that all departmental staff receive sufficient training to stay abreast of library changes, improve skills, and are fully equipped to successfully fulfill job duties. When there are personnel issues, it often falls to the responsibility of the Access Services manager to re-train, discipline, create and implement personnel improvement plans, or other effective methods of addressing such issues.
- **Evaluating** - Access Services managers judiciously evaluate and provide constructive feedback to departmental staff on a regular basis. This ensures staff are continuing to meet service expectations and standards, are made aware of any performance issues that need to be improved upon, and encouraged to develop and continue excellent job performance.
- **Developing and reviewing job descriptions** - Access Services managers develop and review departmental positions to ensure they are accurate, thorough, and up-to-date. As library collections evolve, and as services change or expand, managers must have the ability to evaluate the changing

needs of the department and library users in order to rethink and re-design position descriptions when necessary.

- **Defining and delegating tasks** - Access Services managers articulate expected job performance/tasks/duties clearly and effectively to library staff. They create onboarding processes and documentation to define expectations. They maintain awareness of individual staff strengths in order to effectively delegate tasks and ensure service and workflow continuity.
- **Mentoring** - Access Services managers share knowledge and experience with less experienced staff and student employees, as well as peers. In addition, managers dedicate time to one-on-one mentoring and support.
- **Change management** - Access Services managers ensure that their staff are prepared and supported in making changes within a dynamic service environment. This may include changes to policies, procedures, workflows, services, or organizational structure.
- **Professional development** - Access Services managers actively seek professional development opportunities for staff. They encourage and assist staff to share their experiences and ideas with professional colleagues at conferences and other opportunities. They help staff prepare for professional advancement through expanding their skill sets and other methods.

2.2.4 Safety & Security

This area involves overseeing security and emergency preparedness and response to ensure the library is a safe and welcoming place. Access Services librarians, due to their department's front-line service role and the presence of their staff during most or all building hours, are frequently involved with many issues pertaining to safety and security.

- **Composure** - Access Services staff often serve the role of library security, and must approach or interact with individuals to address policy or conduct violations, complaints, or respond to more serious issues such as theft or medical emergencies. Often these situations require decision-making or support from the Access Services manager. The ability to engage in difficult conversations and resolve stressful situations while remaining calm and composed is an essential skill for the Access Services manager.
- **Conflict management** - There are many situations that require library staff to approach or interact with individuals and that potentially involve conflict such as security-related issues, disputes between individuals, or complaints. In these situations, it is essential to utilize conflict management skills including diplomacy, negotiation, mediation, or de-escalation tactics. Access Services managers must not only possess and model conflict management skills, but also ensure they are understood and applied consistently by all Access Services staff.
- **Response/Contingency planning** - Access Services managers are often responsible to lead the library's response to emergency situations. In that role, they should be capable of preparing and planning for a variety of scenarios, training staff to respond accordingly, and communicating evacuation instructions to visitors. The planning process can involve establishing and maintaining appropriate communication with emergency response personnel, designing contingency plans for essential library service delivery in the event of disruption to normal procedures, and leading, training and preparing library staff to participate in and assist with emergency evacuation procedures. Emergency procedures are recommended to be reviewed and practiced on a regular basis, perhaps monthly.

2.2.5 Service

Service delivery and development are core to Access Services as the “front door” to the library. Whether the specific service areas are circulation, interlibrary loan, reference, technology assistance, or something else entirely, this area emphasizes the competencies necessary for leading and supporting successful services.

- **Managing core access services functions (ILL, reserves, stacks, document delivery)** - Access Services managers must be familiar with the core functions of their area within their institutional setting. This may include circulation, ILL, document delivery, course reserves, and stacks maintenance. Managers must be confident in providing direction, oversight, and support to staff who provide these services, as well as drawing from both staff knowledge and user experiences to consider how services might best be delivered.
- **Customer Service/Relations** - As front-line service providers for the library, Access Services must develop proactive customer service internally and externally. Access Services managers must also be skilled with conflict resolution as part of appeal or complaint processes.
- **Marketing and Outreach** - Access Services managers must coordinate with other departments to market and promote services including interlibrary loan and course reserves or course support services. External outreach is important to interlibrary loan which relies on the relationship with other libraries to provide materials to patrons. An introduction to new faculty and students concerning services provided by Access Services assists in the orientation to the library.
- **Workflows** - Access Services managers ensure that workflow procedures are in place for core services such as circulation, ILL, course reserves, and document delivery. Another aspect of this involves working with system librarians or the IT department to ensure software and hardware for service modules are working properly and will support continuity of service.
- **Policies/Procedures** - Policies help to ensure consistent and equitable provision of services. Access Services managers should ensure that policies and procedures provide clear guidance to staff and patrons and are reviewed, revised, and made available as needed.
- **Technology-informed services** - In addition to technology lending, which is now a common service of many Access Services departments, Access Services librarians must frequently develop and manage patron-driven services (e.g., self-check circulation, laptop checkout stations, room scheduling) involving technology as well as managing technology rich spaces (e.g., makerspaces, media studios, etc.). Managers must stay abreast of technology trends and consider how to make full use of appropriate systems to strengthen and improve services.

2.2.6 Space as a Service

Libraries increasingly view space as a service, including the equipment and furnishings within those spaces. Access Services plays a primary role in managing and maintaining a library’s physical settings, and in planning for and assessing how well spaces serve organizational goals. This area also includes developing and managing technology rich spaces (makerspaces, media studios, etc.), and making full use of appropriate systems to strengthen and improve the department’s mission.

- **Facilities management** - As front-line service staff, responsible for maintaining the physical space of the library, Access Services managers must be able to monitor and coordinate all aspects related to maintaining library space from mitigating and reporting plumbing and electrical issues to maintaining and coordinating technology support and maintenance. This often involves coordinating with other departments (e.g., facilities, IT departments, operations etc.) on campus as

well as within the library (e.g., library emergency teams) when needed. Facilities management also involves creating documentation and contingency plans for staff on duty if facilities issues arise.

- **Accessibility of space and resources** - As specialists in access to space and services, Access Services managers should ensure that their spaces and services are accessible to all patrons regardless of mental and physical abilities. This also includes coordinating with other campus units that oversee ADA and Title IX compliance to ensure that service and space is accessible in an equitable way to all users. This skill also applies more generally to making sure that space and service is available during weather events, power outages and any other issues that might make access to library services difficult for library users.
- **Managing equipment and technology** - As libraries move many services to a digital environment, effectively managing physical equipment and technology is essential. Managers support staff in providing services to users as well as support those using library resources. Examples of this are coordinating with campus technology departments to maintain public computers or working with vendors to provide document delivery services or interlibrary loan. This also extends to spaces dedicated to technology such as makerspaces and computer labs.
- **Assessing spaces** - As the modes of accessing services and materials change, so have the way that libraries use their spaces. As front-line staff, Access Services managers are often very aware of how spaces are used and what issues relating to space may be happening. Maintaining this awareness is crucial in making sure that a high level of service is provided to users. Examples of this may include helping conduct space studies, choosing furniture, or helping coordinate special uses of library space.

2.3 Training

Access Services is a broad, diverse, and changing area of librarianship. As is true of other academic librarians, Access Services librarians and managers need opportunities to pursue ongoing learning and skill development. In turn, they should contribute to the advancement of both Access Services and of academic librarianship in general through activities including participation in professional groups and organizations, and collegial and scholarly exchange, including research, publications, and presentations. A detailed exploration of training and development events, as well as service and scholarship opportunities, are covered in Section 4. While participation in training often requires travel expenses, it is worth noting some of the online training opportunities available to Access Services professionals, as well as an overview of how competencies in this field of librarianship relates to various competency statements.

2.3.1 Online Training

In addition to training offered through associations and conferences, there are many online training opportunities covering areas of importance to Access Services.

Multi-Topic Training

- [OCLC Webjunction](#)
Webjunction provides online training for all types of library professionals and library support staff. All resources are free and many are recorded and may be viewed at a later time. Though focused specifically on public libraries, many sessions are relevant to Access Services.

Copyright

- [CopyrightX](#)
Free self-paced online course on copyright offered by HarvardX, Harvard Law School, and the Berkman Center for Internet and Society.
- [Copyright for Educators and Librarians](#)
Online course offered regularly by Duke University and the University of North Carolina at Chapel Hill. Designed to offer a basic introduction to copyright.

Emergencies/Disasters

Several organizations and agencies offer training related to different areas of disaster and emergency planning. [Emergency Management training](#) is offered by the Federal Emergency Management Association (FEMA). The Department of Homeland Security also offers specific [training related to human threat response](#), such as active shooter situations. The Northeast Document Conservation Center offers training related to [disaster response planning](#) for cultural heritage institutions including libraries, archives, and museums.

2.3.3 Relationship to Other Competency Statements

- [ALA's Core Competencies of Librarianship](#)
This foundational document defines the “basic knowledge needed by all persons graduating from an ALA-accredited masters program.” Examples: Foundations of the Profession; Information Resources; Organization of Recorded Knowledge and Information; Technological Knowledge and Skills; Reference and User Services; Research fundamentals; Continuing Education and Lifelong Learning; Administration and Management
- [Professional Competencies for Reference and User Services Librarians](#)
Access Services are frequently on the front lines of helping library users. This document articulates best practices in assisting with basic and research questions. Examples: 5C. interacts with colleagues and others to provide consultation, mediation, and guidance in the use of knowledge and information; 5E. promotes and demonstrates the value of library services through marketing and advocacy; 5F. assesses and responds to diversity in user needs, user communities, and user preferences; 5G. investigates, analyzes and plans in order to develop future services.
- [LLAMA's 14 Foundational Competencies](#)
This document speaks to competencies needed by library leaders in all areas of specialization. Examples: Communication skills; team building; change management; collaboration and partnerships; emotional intelligence; problem-solving; evidence-based decision-making; conflict resolution; budget creation and presentation; forward thinking; critical thinking; ethics; project management; marketing and advocacy.
- [Shaping the Future: ASERL's Competencies for Research Librarians](#)
Not all Access Services librarians work in research libraries, but this document speaks usefully to competencies needed by academic and research librarians. Examples: develops and manages services that meet user needs and support the research library's mission, intellectual curiosity, understands the library within the context of higher education, demonstrates commitment to the values and principles of librarianship.

Section 3 - Marketing and Outreach

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3.1 Introduction

Access Services professionals play a vital role both directly and indirectly in the promotion of academic libraries resources and services. Outreach can be viewed as connecting patrons with the services, resource offerings, and facilities provided by libraries. Marketing expands outreach to a wider promotion of the library and its services, resource offerings and facilities through use of branding, marketing, and public relations techniques.

Access Services professionals serve at direct service points. Data, both qualitative and quantitative, drawn from these service points provide crucial information about users. Moreover, Access Services professionals effectively represent user needs to colleagues and outside communities to eliminate barriers to access and improve services and outreach.

As user liaisons, Access Services professionals strive to identify appropriate methods and platforms of outreach to introduce current and potential users to the full range of collections, services, events, and programs available from the academic library. Access Services professionals can participate in outreach and marketing through tours, events, presentations, publications, social media, and/or other forms of outreach activities. Campus and library events in which Access Services are involved in hosting are often the most popular methods of marketing the library. The task force is charged with developing tools and identifying training opportunities for effective marketing and outreach efforts by Access Services librarians, managers, and staff.

3.2 Literature Review

In *Twenty-first Century Access Services* (2013) Dethloff & Sharpe acknowledge that Access Services staff have a role to play in marketing and branding through signage, pamphlets, emails, library tours, workshops and social media, particularly by ensuring that information is correct and easily interpreted by users. Access Services may also partner with library or campus communication teams (Bartheld & Thompson, 2014; Litsey & Duncan, 2013). However, in survey literature about librarians' roles in marketing and promotion, Access Services is largely invisible (Carter & Seaman, 2011; Polger & Okamoto, 2013). Polger & Okamoto (2013) surveyed members of reference and promotion-oriented listservs. The majority of respondents' job titles included "reference/public services" as well as "instruction" and to a lesser degree "promotion" or "outreach." Carter & Seaman (2011) surveyed a similar audience for their study of library marketing. In both studies, surveys were not sent to Access Services related listservs, although Access Services professionals may have been members of the

surveyed listservs. The May 2018 ACRL-ASIG environmental scan conducted for this framework attempts to address these gaps in the literature, as discussed in the next section.

The most evidenced involvement of Access Services professionals in marketing efforts occurred as part of projects to implement new services or improve existing services (Adams, Ressel & Silva, 2009; Bartheld & Thompson, 2014; Jones et al. 2011; Litsey & Duncan, 2013). Marketing activities ranged from making collections more visible based on front-line staff observations (Jones et al, 2011) to promoting a new service through a variety of channels and events (Bartheld & Thompson, 2014; Litsey & Duncan, 2013). Litsey & Duncan (2013) engaged in a video-based marketing campaign for a new delivery service but also investigated and reduced users' barriers to entry, a blending of traditional marketing techniques with user experience approaches. Technological solutions may be more potent than instruction. Adams et al. (2009) noted a 360% increase in the use of a consortial borrowing service due to "point of need marketing" activities such as moving requests from ILL to the new service.

In a prescient discussion of the "Transformation of Access Services" from an "operations-based functionality to customer-centered services," Chang & Davis (2010) articulated a clear connection between marketing approaches and service design in Access Services (p. 114).

"Access Services managers need to understand how our users respond to services, and utilize the business marketing cycle constructively to create library spaces conducive to users' needs and provide services and equipment that can enhance their learning and research experience." (Chang & Davis, 2010, p. 117)

Observations of front-line staff, customer-behavior studies, and sophisticated data analysis of usage drive service design most relevant to user needs. Access Services professionals engage in outreach to users through excellent service design and in-reach to library administrators through advocacy and communication about user behavior, usage, and trends (Chang & Davis, 2010). Robust analysis of usage data may be a particularly important contribution Access Services can make to marketing and outreach efforts (Bartheld & Thompson, 2014).

In general, marketing and outreach activities may be ad-hoc and distributed in academic libraries. In 2011, an exploratory survey with 100 participating academic libraries was conducted by Carter and Seaman to explore "how academic libraries manage and support marketing and public relations aspect of their services, resources and facilities." In their article *The Management and Support of Outreach in Academic Libraries*, they report the survey revealed that management of outreach often occurs on an informal and ad hoc basis. Only a minority of libraries had dedicated budgets or mission statements, and 43.9 percent utilized a dedicated outreach position. Sixty-two percent of the libraries with a dedicated outreach position hired professional librarians who may have outreach and marketing experience learned on the job. Approximately 20 percent of the 139 respondents in their study reported their library had an outreach committee. Less than 25 percent had mission statements or clearly defined goals for outreach and marketing. They also noted that outreach work in many libraries is shared by all staff members. The survey results also revealed that the most popular methods of outreach were campus and library events followed by blogs and social media.

3.3 The current status: 2018 environmental scan

In May 2018, the ACRL Access Services Interest Group (ACRL-ASIG) conducted an environmental scan using a 15-question survey to gather information on the level of involvement of Access Services staff in

outreach and marketing activities in their library. Ninety-three (93) participants representing academic libraries of various sizes responded to the survey.

Results clearly indicate a gap between Access Services involvement in outreach and marketing activities and the language used in Access Services librarian job titles or descriptions of duties. Overall, 88 percent of respondents reported there is no mention of outreach and marketing duties in their job description while at the same time 84 percent report having these type of duties assigned to them to some degree. Survey responses can serve to indicate that the majority of Access Services professionals are likely to be engaged in conducting outreach and marketing activities to varying degrees.

Seven Access Services librarian job recruitment notices gathered in March 2018 include “outreach” in the job titles and varying degrees of outreach and marketing duties included in the job description. Ironically, one position was advertised as “Access and Outreach Librarian” but had no mention of any outreach duties in the job description (Appendix B).

In 2011, the survey conducted by Carter and Seaman noted that “many hands” are doing outreach and marketing. Similarly, in the ACRL-ASIG 2018 environmental scan survey, 45 percent of respondents indicated having an “active role” in outreach and marketing for their library. An additional 39 percent reported they “*sort of*” have an active role with their “other duties.”

Outreach by Access Services frequently occurs at the core service points- circulation, ILL, reserve desks, or in the stacks. Often this point of need outreach is supported with fliers, pamphlets, maps, directional materials and signage designed by Access Services staff. Access Services staff are tasked to lead faculty and student orientations, design and staff information tables at campus-wide events, plan and install exhibits and displays, and devise and host library based workshops and special outreach programs. To encourage participation in these events, Access Services staff are often tasked with preparing and managing event signage and promotional materials. They can help design bookmarks, flyers and brochures, directional aids, and digital signage in support of scheduled activities and event based services. Other duties sometimes given to Access Services include preparing and managing social media for promoting resources, services, and events.

Access Services professionals may participate as a member of an outreach, marketing or service-based committee, with an ad hoc working group, or in collaboration with other library and campus departments involved in strategic planning and assessment of outreach and marketing.

Ideally, libraries have strategic plans for outreach and marketing that integrate the roles and activities assigned to Access Services professionals. However, according to the result of the 2018 ACRL-ASIG environmental scan, 20 percent of respondents said their libraries do not have formal plans. This is similar to findings in the 2011 and 2013 survey (Carter & Seaman, 2011; Polger & Okamoto, 2013). Access Services professionals need to anticipate and advocate for participation in developing a department level plan along with collaborating with other library groups for a comprehensive outreach and marketing plan for the library.

Access Services professionals who do outreach and marketing tasks face several challenges. As reported in the May 2018 ACRL-ASIG environmental scan, 65% of respondents seem to struggle most with time, 57% reported a lack of a coordinated effort or a strategic plan that outlines outreach and marketing activities for their library, and 48% a lack of assessment strategies to gauge success.

Other challenges Access Services professionals reported include technical skills related to developing creative ideas (39%) and graphic design skills (43%), insufficient outreach and marketing communication channels to users (34%), and using social media skills (20%). Administrative related challenges include a

lack of resources/budget (45%), combined with little or no recognition of the work and value given to Outreach and Marketing by Access Services (31%), and a lack of administrative support (21%).

The range of tools utilized by Access Services professionals was fairly extensive and use appeared to be opportunistic based upon available communication channels or campus resources. Respondents listed both tools utilized in the creation of marketing and outreach materials (i.e., graphic design programs, data visualization programs) as well as channels for marketing and outreach (social media, digital displays, campus listservs). These tools require varying levels of expertise and cost. This response demonstrates the complexity of tools used based on different communication channels and opportunities:

“academic campus email list to faculty, students, etc.; Adobe software and MS Publisher for design; Drupal; WordPress blog; social media tools especially Facebook and Instagram; Qualtrics and Survey Monkey; physical display equipment, e.g. wall-mounted poster holders; whiteboards; pen and paper, sketching; Wiki for tracking advertising team plans and efforts/outcomes.”

3.4 Access Services as a Communications Hub

Access Services librarians are often well placed in an organization to observe and enrich marketing and outreach activities and strategic plans. They have well-established communication pathways between library administration, facilities staff and building managers, evening and weekend staff, student staff, library and campus technology units, departments of public safety, institution event staff, academic department staff, and most importantly library users. As a public service unit, Access Services professionals, particularly front-line staff, are often required to provide point of need information about events, services, and library or campus programs. Access Services professionals can easily observe and interact with students and/or users participating in an activity or using a service, which can provide important support for assessment.

Given this unique position, Access Services professionals have valuable knowledge to contribute to formal strategic plans for services and events, and would benefit from opportunities and dedicated time to participate in plans and activities they are often involved in anyway. Formal training in outreach and marketing would provide Access Services professionals the skills and tools necessary to complete work efficiently and effectively and increase knowledge of assessment techniques. These efforts will inevitably result in better plans, more effective services, better communication between library departments and the public, and reduced confusion and frustration for front-line staff.

3.5 Building a Toolbox for Access Services Outreach and Marketing

To support successful outreach activities and services, Access Services professionals will need to:

- Gain opportunities to participate in strategic planning committees and groups responsible for investigation, development, and improvement of the library’s services and outreach and marketing efforts.
- Advocate internally for the staff support necessary to provide services and hold events.
- Identify, find, and recommend unique services and outreach opportunities, especially based on user feedback.

- Demonstrate the value of services and outreach activities. This can be supported by the use of the routine data gathered at service points and through special outreach activities.
- Participate in assessment activities and present results to internal stakeholders in a variety of formats, including data dashboard and data visualizations.

In support of these, Access Services professionals need opportunities to develop their skills and competencies through training. Familiarity with marketing and outreach tools potentially can make outreach and marketing tasks easier and less time consuming. Training efforts should include a focus on digital tools and communication channels rather than print-based tools. Training recommendations include:

- Strategic planning and assessment for outreach and marketing
- Identifying core services/target groups for outreach and marketing
- Promotion techniques
- Branding and visual messaging techniques
- Style Guides- institutional and/or departmental
- Graphic design
- Creating and using social media for outreach
- Data dashboards and data visualization tools

3.6 Basics for Outreach and Marketing Toolkit

There are many existing library-focused marketing and outreach communities of practice (see links section), as well as non-library and vendor communities (canva.org, Tableau Public). ACRL-ASIG may consider partnering with other ALA/ACRL groups (RUSA, LLAMA, LITA) to raise awareness of Access Services' role and unique contributions in outreach and marketing and highlight these opportunities to its own members.

In addition, ACRL-ASIG should consider hosting “share and tell” events in which Access Services professionals engaged in marketing and outreach share their materials, discuss tools and their learning process. Several of the respondents to the survey indicated they would be willing to discuss their efforts more fully. Finally, as ACRL-ASIG develops the Framework for Access Services, it should consider hosting discussions of emerging trends in Access Services, one of which is a blending of outreach responsibilities into Access Services. (See Appendix B).

The following Toolkit highlights existing resources that may support Access Services outreach and marketing efforts.

3.6.1 Marketing and outreach academic library communities

- [ACRL Library Marketing and Outreach Interest Group](#): a listserv but also a facebook group.
- [ACRL University Libraries, Academic Outreach Committee](#)
- [Marketing with Social Media : A LITA Guide](#). Thomsett-Scott, Beth C. 2018. American Library Association.

- [ALA e-Learning Opportunities](#): RUSA and LITA have both offered recent webinars on aspects of marketing and outreach
- [Marketing](#), in RUSA's Virtual Reference Companion

3.6.2 Planning and Assessment

- Hallmark, E. K., Schwartz, L., & Roy, L. (2007). Developing a long-range and outreach plan for your academic library. *College & Research Libraries News*, 68(2), 92-95.
- Potter, N. (2012). The library marketing toolkit. London: Facet Publishing.
- Wengler, S. (2018). Branding matters: Reimagine your library services. *College & Research Libraries News*, 79(3), 118-121.
- [Tableau Public](#)- a free software for creating interactive data visualizations for the web.
- [Google Analytics](#)- web analytics service offered by Google that tracks and reports website traffic

3.6.3 Graphic Design ideas and tools

- [Ad/Lib](#)- examples of design and advertising work from a variety of library types.
- [Canva](#) - graphic tool for creating a variety of promotional materials. Free and low-cost templates. Librarians can upload their designs for sharing.
- [CC Search](#) - search content with Creative Commons licenses from different databases from independent organizations (Wikimedia Commons, SoundCloud, Google Images, Pixabay)
- [Library Design Share](#) graphic designs by librarians for librarians

3.6.4 Social Media Online Management Tools

- [HootSuite](#)- create, schedule, manage social media posts to multiple media sites
- [Smore](#) - create and manage digital newsletters

Section 4: Professional Engagement Through Writing, Conferences, and Service to the Profession

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4.1 Introduction

Access Services librarians have multiple outlets for participating in and contributing to the profession in their area of expertise through scholarship, professional development, and service. Individual position

descriptions and local expectations largely determine the extent to which librarians participate and contribute; however, it is critical that employers encourage and expect their Access Services librarians to contribute to the profession and participate in professional development opportunities as much as possible, and support them in these endeavors. This not only helps ensure their ongoing professional development, but also the evolution, relevance, and impact of Access Services-related technology, workflow, and services within their organizations.

4.2 Writing

Access Services-related scholarship appears in a wide range of forums that vary in scope, from peer-reviewed journals to trade publications, monographs and monographic serials, relevant blogs, online discussion forms (e.g., listservs), etc. Access Services professionals may work independently or collaboratively on research-based, practice-based, or theoretical publications. While they may submit works to any publication or forum, the following are of particular value and interest to Access Services librarianship:

4.2.1 Journal Publications

- [Collaborative Librarianship](#): *Collaborative Librarianship* is committed to scholarly open access publishing and devoted to collaboration across the broadest spectrum of librarianship. The publication highlights all forms of collaboration – within libraries, between libraries, with non-library partners, and with consortia.
- [College and Research Libraries](#): *College & Research Libraries (C&RL)* is the official scholarly research journal of the Association of College & Research Libraries, a division of the American Library Association. C&RL is a bimonthly, online-only publication highlighting a new C&RL study with a free, live, expert panel comprising the study's authors and additional subject experts.
- [College & Undergraduate Libraries](#): *College & Undergraduate Libraries* supports the continuous learning of academic library staff. The journal highlights the strategic foci of undergraduate learning through libraries along with collaborations and connections both on and off campus. Academic library staff benefit from the journal's research-based articles, case studies, reports of best practices, occasional literature or product reviews, and columns or special issues devoted to current topics.
- [Information Discovery and Delivery](#): *Information Discovery and Delivery* covers information discovery and access for digital information researchers. This includes educators, knowledge professionals in education and cultural organizations, knowledge managers in media, health care and government, as well as librarians. The journal publishes research and practice which explores the digital information supply chain, i.e., transport, flow, tracking, exchange, and sharing within and between libraries.
- [Journal of Access Services](#): The *Journal of Access Services* welcomes the submission of research, theory, and practice papers relevant to Access Services in libraries and archives of all types. Access Services is the broad field and collective term of all the services that provide, facilitate, and manage the access of the clientele to the information resources acquired or made available by the libraries or archives with the aim of allowing for easy and convenient retrieval of needed information, utilization of information resources to the fullest extent, and greatest availability of resources to each of the clientele.
- [Journal of Interlibrary Loan, Document Delivery & Electronic Reserve](#): The *Journal of Interlibrary Loan, Document Delivery & Electronic Reserve* provides a forum for the presentation of pure and

applied research results, discussion of best practices and review of literature regarding all aspects of library resource sharing. This journal aims to support the widespread and fast paced advancement of library resource sharing by capturing the trials, research, and innovations of librarians and library professionals, both local and international, and delivering news of these endeavors to the benefit of others in the field. The journal encourages submission of scholarly papers on the history, obstacles, and innovations of all manner of library resource sharing and cooperation including, but not limited to interlibrary loan, shared storage facilities, shared virtual services, cooperative training and collection development.

- [Public Services Quarterly](#): *Public Services Quarterly* covers a broad spectrum of public service issues in academic libraries, presenting practical strategies for implementing new initiatives and research-based insights into effective practices. The journal publishes research-based and theoretical articles as well as case studies that advance the understanding of public services, including reference and research assistance, information literacy instruction, access and delivery services, and other services to patrons. Articles may examine creative ways to use technology to assist students and faculty. Practice-based articles should be thoroughly grounded in the literature and should situate the work done in one library into the larger context of the situation.
- [Reference and User Services Quarterly](#): *Reference & User Services Quarterly (RUSQ)* is the official journal of the Reference and User Services Association of the American Library Association. The purpose of *RUSQ* is to disseminate information of interest to librarians in areas such as reference services, collection development, readers' advisory, resource sharing, technology for reference and user services, and other aspects of user services. The scope of the journal includes all aspects of library services to adults in all types of libraries. In response to the nature of our rapidly evolving field, the journal publishes empirical (quantitative and qualitative), theoretical, and historical research and essays as peer-reviewed featured articles.

4.2.2 Listservs

- acr-igas@lists.ala.org
List for the ACRL Access Services Interest Group. For more information and subscription options, see: <http://lists.ala.org/sympa/subscribe/acr-igas>
- ILL-L@oclists.org
Covers all topics relating to interlibrary loan and resource sharing. For more information and subscription options, see: <https://www.oclc.org/forms/internet-subscription.en.html>
- lama-storage@lists.ala.org
List for discussion of all issues related to library storage facilities.
- LIB-CIRCPLUS@PRINCETON.EDU
List covering all aspects of circulation and related access services areas. For more information and subscription options, see: <https://lists.princeton.edu/cgi-bin/wa?A0=LIB-CIRCPLUS>
- safety-l@lists.ala.org
LLAMA list for discussion of safety and security issues in libraries.

4.3 Conferences

There are numerous conferences relevant to Access Services librarians that range in scope from specialty areas to librarianship more generally, and are held at institutional, consortial, state, regional, national, and international levels. Conference attendance provides professional development opportunities for Access Services librarians, as well as a chance to contribute directly to the profession

through scholarship and service. Access Services librarians are encouraged to review programs for the following conferences and attend, contribute to, and participate in these events when possible. While attendance to all conferences is understandably not feasible for any one Access Services librarian, and perhaps attendance is not at all possible for some individuals, many conference boards post biographies and contact information for presenters, as well as slideshows, white papers, and/or handouts from each presentation on their websites as an alternative way of accessing information.

- [Access Services Conference](#): The Access Services Conference is an opportunity for individuals working in all areas of access services in academic libraries to gather information and communicate with other professionals about circulation, reserves, interlibrary loan, student worker management, security, and other topics of interest. The conference is held in Atlanta, GA, in early November.
- [Association of College & Research Libraries \(ACRL\) Conference](#): Held biennially, this conference focuses on all issues relevant to college and research libraries.
- [ALA Annual Conferences and Midwinter Meeting](#): These events have the reputation for being the top educational and networking opportunities for librarians. The networking opportunities have an outstanding track record for bringing long-term professional benefits, including sharing ideas and best practices throughout the field. Attendees can participate in sessions ranging from general applicability to librarianship to specific focus on areas related to Access Services.
- [Back in Circulation Conference](#): This annual conference is hosted by the University of Wisconsin-Madison. Session topics include e-reserves, stacks management, staff management, staff training, staff motivation, keeping up with technology, customer service, diversity issues, and innovation.
- [Circulation Conference](#): The Circulation Conference provides workshops and presentations for circulation staff that benefit professional development and improve performance in the workplace. From these workshops, attendees gain necessary tools to help them become more productive workers. By meeting with other circulation personnel, this is an excellent opportunity for participants to discuss challenges, issues, procedures, concerns, and success stories.
- [Colorado ILL Conference](#): The CO ILL Conferences offers traditional 45-60 minute presentations, as well as 10-12 minute lightning talks. Presenters include library employees from academic, public, rural, and special libraries and cover topics such as resource sharing best practices, marketing ILL, assessment, workflow enhancement, and more.
- [OCLC Resource Sharing Conference](#): The OCLC Resource Sharing Conference has an extensive program covering topics related to resource sharing software, services, processes, and professional development. This conference is particularly useful for those in the ILLiad, Tipasa, WorldShare Interlibrary Loan, WorldCat Navigator, VDX, Relais ILL, and/or Relais D2D communities.
- [Great Lakes Resource Sharing Conference](#): The purpose of the conference is to with your colleagues from libraries across the Great Lakes region to collaborate, share ideas, and expand your knowledge of resource sharing to better serve your library users.
- [Information Delivery Services \(IDS\) Project Conference](#): The IDS Conference is packed with information and training regarding exciting new technologies and strategies for information access, resource sharing and acquisitions/collection development. Session tracks include ILL/DD, Technology, and Collection Development.
- [International Federation of Library Associations Interlending and Document Supply Conference](#): The Section on Document Delivery and Resource Sharing is the forum in IFLA for libraries and associations concerned with making information in all formats available throughout the world through a variety of resource sharing and document supply techniques.

- [Northwest Interlibrary Loan and Resource Sharing Conference](#): The purpose of the conference is to support librarians and paraprofessionals in public, academic, and special libraries from the Pacific Northwest who have ILL and/or Resource Sharing as a significant portion of their jobs.
- [Southeastern Resource Sharing Conference](#): The purpose of the conference (inaugural, October 2018) is to bring resource sharing professionals from around the Southeastern United States together in order to discuss best practices and common issues in relation to interlibrary loan, document delivery, offsite storage, and shared collections, among other topics.

4.4 Service

Access Services librarians are encouraged to contribute to the profession through service in whatever capacity they are able, focusing to some extent in areas specific to Access Services. While some service opportunities require travel, conference attendance, and/or routine meetings, there are plenty of opportunities to contribute to the profession remotely and asynchronously. Professional service may be provided at consortial, state, regional, national, and international levels, and include, for example, roles on editorial advisory and conference planning boards, as well as within professional organizations and associations. Specific examples of Access Services-related service opportunities may be found by exploring any of the publications or conferences referred to above, as well as relevant organizations and associations.

4.4.1 Professional Associations

- [Association of College and Research Libraries \(ACRL ASIG\)](#)
ACRL provides resources for library professionals who work in an academic setting. ACRL hosts biennial national conferences, and training, publications, and mentorship programs. In addition to the parent organization, ACRL includes the Access Services Special Interest Group as well as groups for ILL/Resource Sharing. Many states and regions have ACRL-affiliated chapters.
- [Library Leadership & Management Association \(LLAMA\)](#)
LLAMA advances “outstanding leadership and management practices in library and information services.” Many LLAMA communities--Buildings and Equipment, Human Resources, Technology--are relevant to Access Services.
- [Reference and User Services Association, Sharing and Transforming Access to Resources Section \(RUSA STARS\)](#)
RUSA STARS is a community of librarians and practitioners who explore topics in interlibrary loan, document delivery, remote circulation, access services, cooperative reference, cooperative collection development, remote storage, and other shared library services.

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Appendix A

Charge for Framework

January 2018

ACRL Access Services Interest Group Charge to create a Framework for Access Services Librarianship

Introduction:

At a series of ACRL Access Services Interest Group meetings (ASIG, formed 6/2016), discussions have formed and developed around the need to define and promote the importance of access services librarianship. The programmatic areas of access services librarianship are broad, diverse, and expanding as other traditional areas of librarianship also continue to change. Functions such as reference, security, facilities, educational technology, and makerspaces are being added to traditional work such as circulation, stacks maintenance, and interlibrary loan. Access services librarians continue to voice concerns about how to contribute to their institutions in a meaningful way – positively impacting public services, developing new initiatives while still providing traditional library services that are diminished but still exist. The charge of this Task Force is to investigate, make recommendations, and provide guidance in four broad areas of concern to guide practitioners and advocates of this specialty in their work and programmatic development.

Charge:

The Access Services Librarianship Task Force is charged with investigating four broad areas and developing recommendations and best practices. Each focus area shall have a small working group to investigate, discuss, and develop recommendations to broadly answer the questions and issues charged within the focus. Chairs of each focus area will work with the ASIG executive committee to answer questions and ensure deadlines are met.

- **Focus Area 1 - Definition of Access Services.** The field is difficult to define and has a scope that often comprises many areas, programs, and services located in a multiple broad areas of academic library services and programs. The task force is charged with investigating and making recommendations on the definition of Access Services with the goal of clearly stating what it is.
- **Focus Area 2 - Unique Skills required for Access Services.** Access Services librarians and managers are often in a unique situation overseeing complex back-end operations and time-sensitive public service desks with a myriad of staffing types and levels. In addition, Access Services librarians are managing front-line services in support of the use of non-traditional collections and services such as media equipment, maker spaces, and technology. Access Services librarians are also collecting data and providing feedback on collection metrics, facilities usage and assessment initiatives. The task force shall make recommendations on required skill sets, training, and best practices for effective management by Access Services librarians and managers.
- **Focus Area 3 - Marketing and Outreach.** Access Services librarians often oversee and manage core services which, while an essential part of the everyday experience for thousands of

library users, are often not in the highest area of development and investigation by the organization. Access services librarians recognize the importance of effective marketing to library users and possibly the broader community in which their institution is located. They also advocate for staff support necessary to provide these core services while also finding unique outreach opportunities. Access Services librarian, managers, and staff can be a valuable marketing and outreach tool for the academic library. The task force is charged with developing tools and training for effective marketing and outreach efforts by Access Services librarians, managers, and staff.

- **Focus Area 4 - Professional Engagement through Writing, Conferences and Service to the Profession.** Access Services librarians have multiple outlets for engaging with the profession and interacting with other professionals in their area of expertise. The task force is charged with identifying those avenues and making recommendations on the appropriate activities and level of engagement for Access Services librarians in their specialty and the broader field of librarianship.

Timeframe:

It may be more efficient to divide the task force into operational areas of focus. However, because of the broad scope of the task and the need to identify other volunteers, it is expected that the task force will do the following:

- Discuss framework and open questions to determine scope of charge: ALA Annual, June 2017 - Completed
- Determine method of approach and divide up areas of responsibility: September 2017 - Completed
- Identify and recruit other volunteers to work on each Focus Area: October – November 2017 - Completed
- First draft of responses or discussion topics ready for feedback at Midwinter: February 2018 – Delayed. Chairs designated and volunteers assigned in January 2018. Topics to be discussed broadly at February Midwinter meeting. This may delay completion of first draft submission at Annual.
- First draft completed: June 2018
- Revise and review: 2018-2019
- Final Report completed: ALA Annual 2019

Task Force ASIG Executive Committee:

- ASIG Executive Committee

Brad Warren, ASIG Convener, ex officio

DaVonne Armstrong, ASIG Incoming Convener, ex officio

Amy Boucher, ASIG Recorder, ex officio

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Appendix B

Sample Job Descriptions with Outreach and Marketing in job title/job duties.

Access and Outreach Services Librarian

Randolph College
Lynchburg, VA

Reporting to the Director of the Library, the Access and Outreach Services Librarian will manage the library's circulation, course reserves, and interlibrary loan operations for Lipscomb Library. Duties will include supervising 1.75 staff members, training and scheduling approximately twenty student assistants, performing stacks maintenance for the general circulating and video collections, overseeing equipment and facilities management, and **planning outreach activities for faculty**, students, and staff. Additionally, the person selected for this position will provide some reference and instructional services during academic semesters, which will include working a regular evening shift and occasional weekend hours

ChronicleVitae (March, 2018)

Access and Outreach Services Librarian

University of San Diego
San Diego, CA

The University of San Diego's Copley Library seeks an energetic and enthusiastic individual for a new library faculty position as Access and Outreach Services Librarian. The successful candidate will manage circulation, interlibrary loan, document delivery, San Diego Circuit, copyright clearance permission, reserves, inventory, stack management, building security, disaster preparedness, and billing and collection of overdue fines and lost materials.

ALA Connect (March, 2018)

Access Services & Outreach Librarian

Monterey Peninsula College
Monterey, CA

Monterey Peninsula College (MPC) seeks a full-time tenure track Library Instructor. Under the direction of the Administrator assigned to the Library, and in coordination with the other faculty librarians, this position is responsible for the planning and development of library access and public services at the main campus, satellite centers, and for online programs. Assignments may include day, evening and weekends at the Monterey campus, Marina Education Center, other sites in the community, as well as online services.

Demonstrated ability to **coordinate public outreach, marketing, and library events, workshops, and displays.**

Provide outreach to academic divisions to ensure library collections are current and meet instructional needs.

Manage the acquisitions process for academic materials and access to archives and special collections.

UNC Greensboro Employment Website (March, 2018)

Access, Outreach, & Public Services

Freel Library, Massachusetts College of Liberal Arts
North Adams, MA

This is a full-time benefited position within the AFSCME Bargaining Unit. The Library Assistant collaborates with other staff to offer a variety of services focused on delivering convenient and seamless access to library materials, enhancing the visitor experience, and increasing awareness of library

offerings. The Access, Outreach, and Public Services Assistant offers responsive services at the circulation desk; creates a welcoming atmosphere; hires, trains, and supervises student library assistants; organizes stacks maintenance projects and procedures; and assists with student-focused programming and outreach. Responsibilities include collaborating with the Circulation Supervisor to coordinate the daily workflow; participating in the interlibrary loan process; helping to manage the ILS including course reserves; **helping to create library marketing materials**; assisting students in the use of library technologies, including printers, scanners, and the catalog; and assisting the librarians in providing information about library resources and services online, in-person, and through social media.

Simmons University SLIS Jobline (March, 2018)

Access Services and Outreach Librarian

University of Mary Washington Libraries
Fredericksburg, VA

The Access Services and Outreach Librarian supervises staff in the access services unit and coordinates the use of student assistants in circulation and interlibrary loan. The librarian also **coordinates the Libraries' outreach and marketing efforts**. Responsibilities include: coordinating policies and procedures for public services for the UMW Libraries, communicating and interpreting library policies to faculty, staff, and students, and establishing workflow and quality control measures in the Access Services units. The Access Services Librarian is responsible for services in Simpson Library throughout its hours of operation and coordinates with appropriate personnel regarding library security.

Catholic University LIS Jobline (March, 2018)

Circulation and Outreach Specialist

Bowling Green State University Libraries
Bowling Green, OH

The Circulation and Outreach Specialist works to **promote** the Access Services department and the University Libraries (UL) main collection, **encourages patrons to use UL services, and educates current and potential users**. This person will work with other UL departments and the UL Dean's office to promote the main collection and library space and serves as the primary coordinator of student orientation events on behalf of the UL. The Specialist will create **training materials and opportunities to ensure excellent customer service, create and manage relevant patron education and marketing materials**, and supervise student employees at the desk. Works some evening and weekends and is the primary contact for circulation students when the library is open. This position has many other related duties and is in Bowling Green Ohio.

ALA Joblist (March, 2018)

Outreach and Public Services Librarian for Special Collections & Archive

University of California, Irvine
Irvine, CA

The Outreach and Public Services Librarian is responsible for coordinating instruction, **outreach**, programming, reference, and access services for Special Collections and Archives. Reporting to the Head

of Special Collections and Archives, the Outreach and Public Services Librarian provides educational, programmatic, and promotional outreach to faculty, graduate and undergraduate students, visiting scholars, and others whose research, teaching, communications, and learning activities benefit from engagement with Special Collections and Archives. In consultation with the Department Head, the Librarian is also responsible for development and implementation of policies and procedures for reference, duplication, access, and reading room services in Special Collections and Archives in accordance with identified standards and best practices.

As the public services lead for the department, the Outreach and Public Services Librarian is responsible for developing and participating in new and innovative approaches for effective outreach and reference services; managing and performing user education, orientation, and instruction activities for individuals and classes in collaboration with UCI Libraries' subject specialists and the Education and Outreach department; **promoting and marketing Special Collections and Archives initiatives, collections, programming, and services through tours, presentations, publications, social media, and other appropriate means;** coordinating collection management activities including book and periodical processing, stacks maintenance, and other related functions supporting the use of Special Collections and Archives materials in consultation with the Head and departmental staff; serving a lead role in curating and mounting the department's physical and digital exhibits programs and assisting the UCI Libraries Exhibits Program with physical and digital exhibits as appropriate; and serving as the collection development lead for book and serial collections in the department in consultation with the Department Head. The Outreach and Public Services Librarian may participate in donor relations and grant proposals as appropriate.

UC Irvine Employment website (March, 2018)