

A Brief History of Relationship Management (in the UK)

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@pcheeseman, @rmlibs

DFFU WINTER MEETING 2020: KICK THE DOOR IN - THE PROFESSIONAL RELATIONSHIP
Klarskovgaard on 27-28. February 2020



Lancaster University

Founded in 1964

A medium sized research-intensive university

Main campus 3 miles south of City

13,000 students (Lancaster campus)

4 Faculties with 27 Departments

Global University with campuses / partnerships in China, Ghana, Malaysia, Germany

<https://www.lancaster.ac.uk/>
@LancasterUni



The Library

Single site

70+ staff

3 service areas

Academic Services: Faculty Librarians, Learning Development, Special Collections

Operations and User Services: Library building, collections and user services

Digital innovation and research Services: Open Access, RDM, Research Intelligence, Library Systems, Digital Innovation

<https://www.lancaster.ac.uk/library/>

@LancasterUniLib

Relationship Management in H.E. Libraries Group

- Established in 2013 by Universities of Manchester and York
- Initially for team managers, opened to team members in 2015
- An informal network, biannual events with conference on alternate years
- Membership – c. 300 members, 90 UK institutions + members from Australia, New Zealand, Ireland, The Netherlands, Denmark, Norway and USA

Relationship Management in HE Libraries Group

<https://relationshipmanagementgroup.wordpress.com/>

LIS-RELATIONSHIP-MANAGEMENT@JISCMAIL.AC.UK

Follow on Twitter @rmlibs



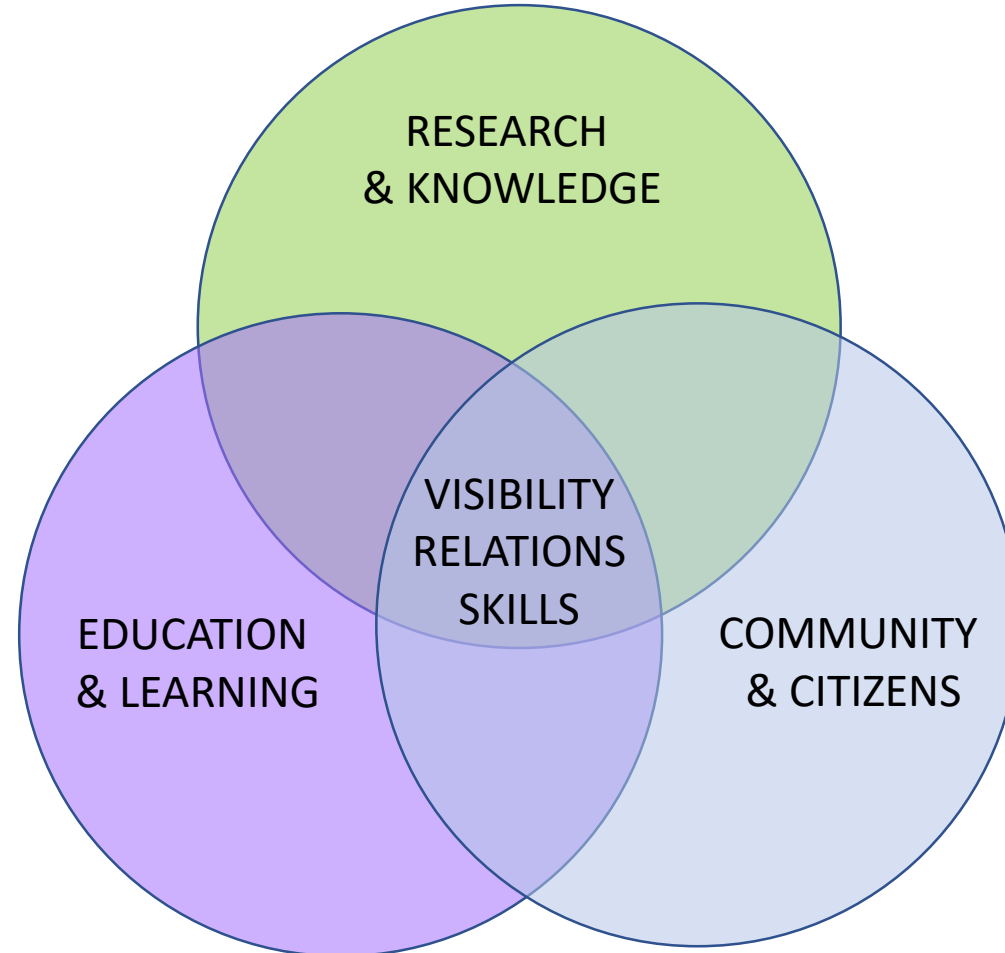
Geisel Library by Maciek Lulko is licensed under [CC BY-NC 2.0](#)

Why talk about relationship management?

Libraries and their institutions are undergoing a significant period of change

- New services emerging – research services, academic skills, digital skills
- The nature of collections and the role of libraries in providing them
- Student expectations and study behaviours
- New roles, new services and changing relationships

Relations are at the heart of your strategy



What is hygge?

- Can it be defined?
- A mis-understood or mis-sold term?



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What is relationship management?

- Are we just giving a name to something we have always done?
 - If it is something new, can we define it?
 - Is it an art or a science?
-



Relationship management in action

Finding your 'library
champion': increasing
engagement with the
School of Computing &
Communications

Lesley English (@LUni_Lesley)
Lancaster University



The problem (opportunity)

- “In my previous report I commented on the rather disappointing quality of the dissertations, and this was again evident this year.

Candidates not only lacked the ability to present their ideas clearly (not uncommon to be fair), but also seemed to have poor grasp of the nature of research methods as well as of evaluation and measurement.

My impression was that they were technically able and did produce good work, but were rather weak in terms of their ability to articulate what they had done, and why”

External examiner, December 2017

A short history...

The Partnership Lesley (Faculty Librarian)
Robert (Learning Developer)
Paul (Director for Undergraduate Teaching)
Mike, Jaejoon and Barry (module convenors)
Tim and Lucas (Computer Science Society)



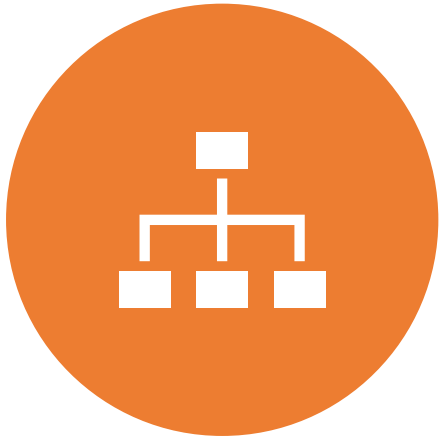
Relationship Management Successes

- Involvement in Curriculum Review
- Integrated dissertation writing workshops
- Attendance at staff: student committees
- Collaborative bid for Widening Participation funding
- Strengthening links with the Computer Science Society

Relationship
management
is
(my definition)

- **Focusing on people** not just on collections and services
- **Understanding the other**, their motivations, needs and challenges
- Seeking out **opportunities to engage**
- Aligning activities with **strategic goals**
- Working in **partnership** rather than as a provider
- Measuring success in terms of **impact** not tasks completed

Where next?



ROLES, STRUCTURES AND
RM SKILLS

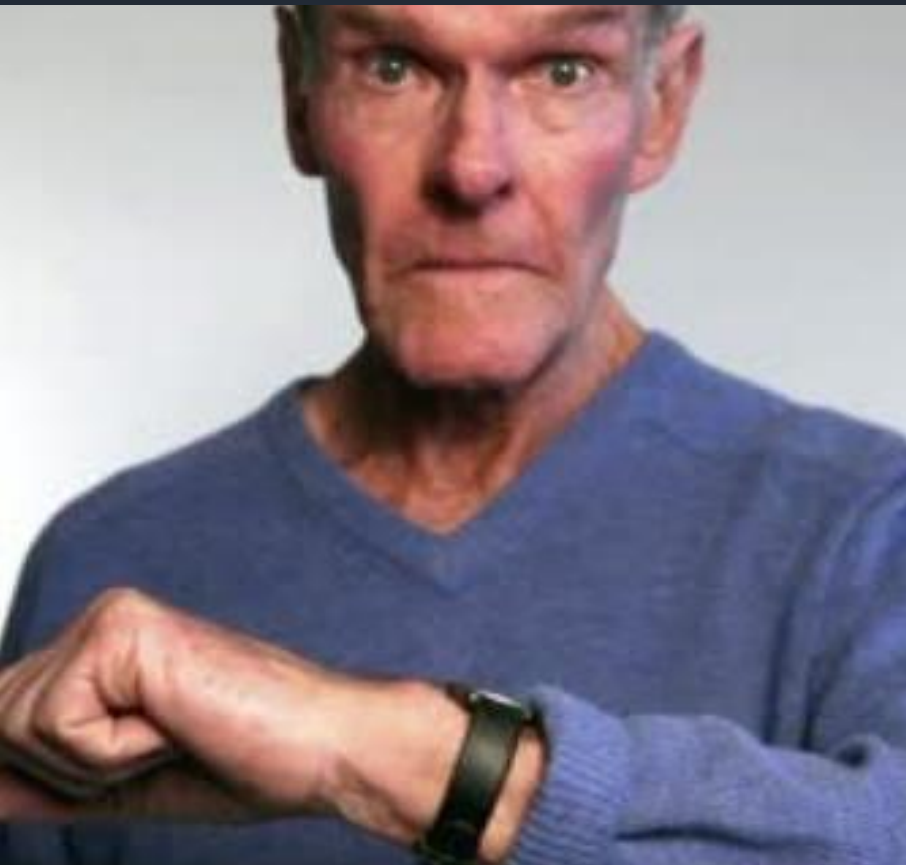


OPPORTUNITIES AND
PARTNERSHIPS



STRATEGY AND
PLANNING

Opportunities



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How do we identify opportunities and position ourselves, so we are able to act on them?

In the right place at the right time!

- In the best position to act on an opportunity

Find the hook!

- the problem you can help them solve or the benefit you can help them realise

Strike while the iron's hot!

- - act on the opportunity immediately, it may not come around again.



But what if you can see the opportunity, but they can't?



Nudge

Improving Decisions About
Health, Wealth, and Happiness

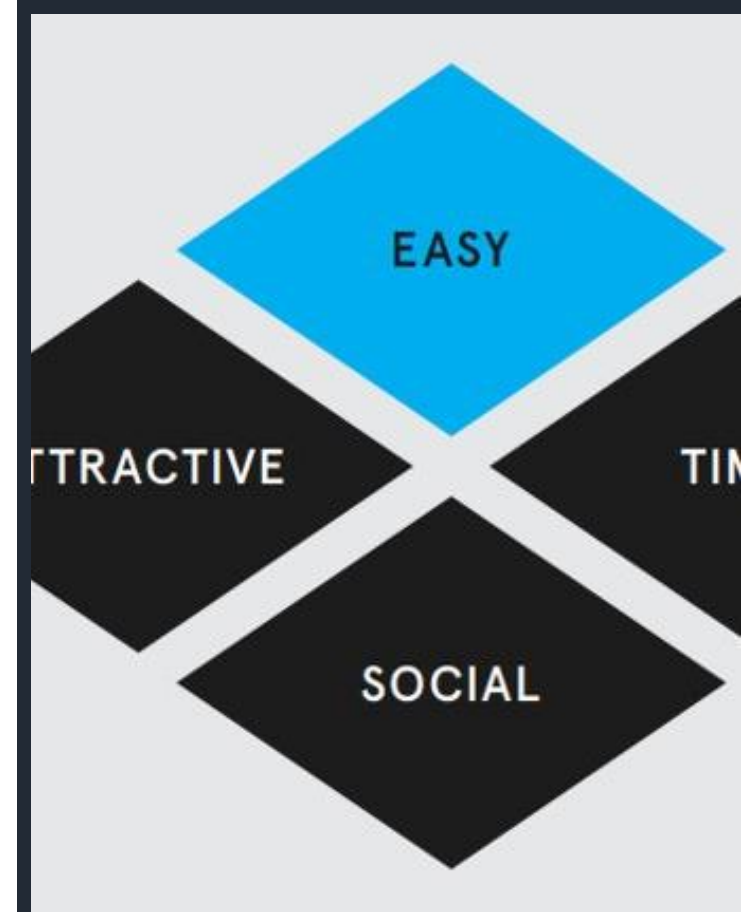
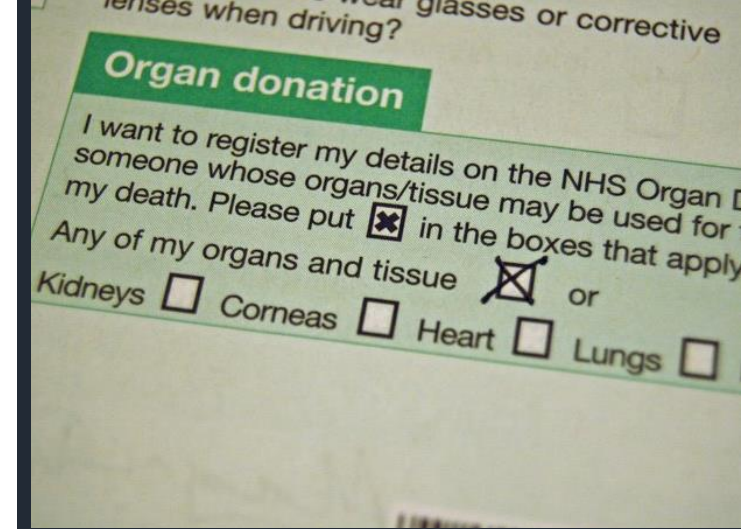
Richard H. Thaler and Cass R. Sunstein

Revised and Expanded Edition

Nudge theory: influencing decision making and behavior through positive psychology

- Use normalizing language and primers
- Use social proof ... evidence of engagement by others
- Call a hard sell a pilot
- Become a fixture
- Avoid over communicating – keep it simple!
- EAST – Easy, Attractive, Social, Timely
- Use Nudge alongside evidence based approaches

Phil Jones (@jonesthelibrary)
Coventry University



Are you a provider or a partner?



WHAT KIND OF
RELATIONSHIP?



RELIABLE
PROVIDER



TRUSTED
PARTNER



INSPIRING
PIONEER

Partnership requires openness, trust and honesty, agreed shared goals and values and regular communication.

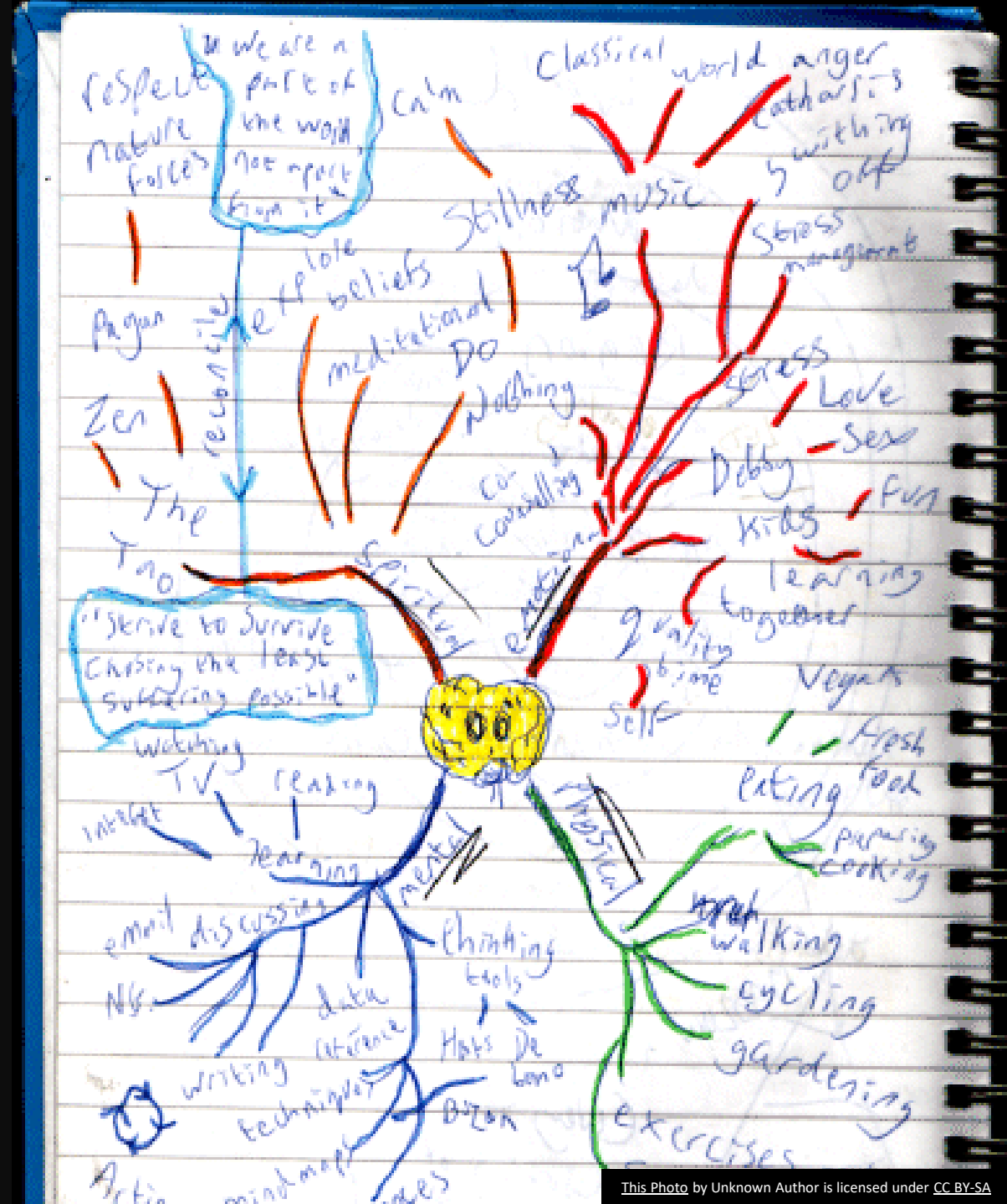
But there can be a clash of cultures and we don't always speak the same language.

Understanding the other

Understanding Academics: A UX Ethnographic Research Project at the University of York

- Used cognitive maps and semi-structured interviews to develop a synthesis of what it means to be an academic at York and
- identify key themes that would form the basis for future work – resources, digital skills and tools, research support and digital and virtual spaces.

Michelle Blake (@Michelle_Blake)
Vanya Gallimore (@VanyaGallimore)
University of York



Strategic goals and action plans



Identifying opportunities and establishing partnerships takes time, requires a broad range of skills and depends on building and maintaining productive relationships.



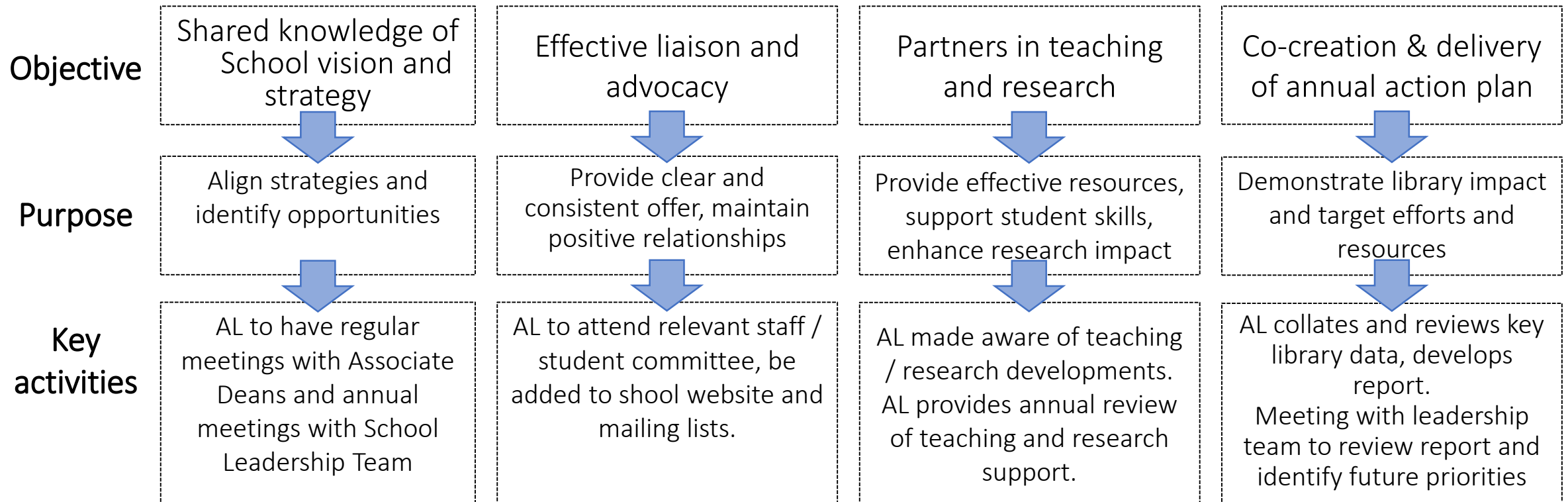
But what happens if we are inundated with requests with no sense of priority or the opportunities end, or the partnerships move on?



We need a plan that is clearly aligned to library and institutional vision and strategy

Library and Schools Partnership Model

Helen Young and Steph McKeating, Academic Services Managers (Job-share)
Loughborough University



Library and Schools Partnership Model

Helen Young and Steph McKeating, Academic Services Managers (Job-share)
Loughborough University

Benefits

- Greater consistency and some sharing of practice
- Greater visibility – invitations to committees
- Increased awareness on both sides
- Legitimised actions – leadership buy in
- Increase in engagement activity

Future developments

- Further (minor) development of model
- Staff development - soft skills and digital fluency
- Sharing of activity across library

Challenges

- Seen as an AST thing
- Clarifying offer
- Confidence
- Partnership can feel one-sided
- Seen by some as tick box exercise
- Embedding and maintaining
- Data analysis
- Meeting busy people

Strategic Engagement: New Models of Relationship Management for Academic Librarians

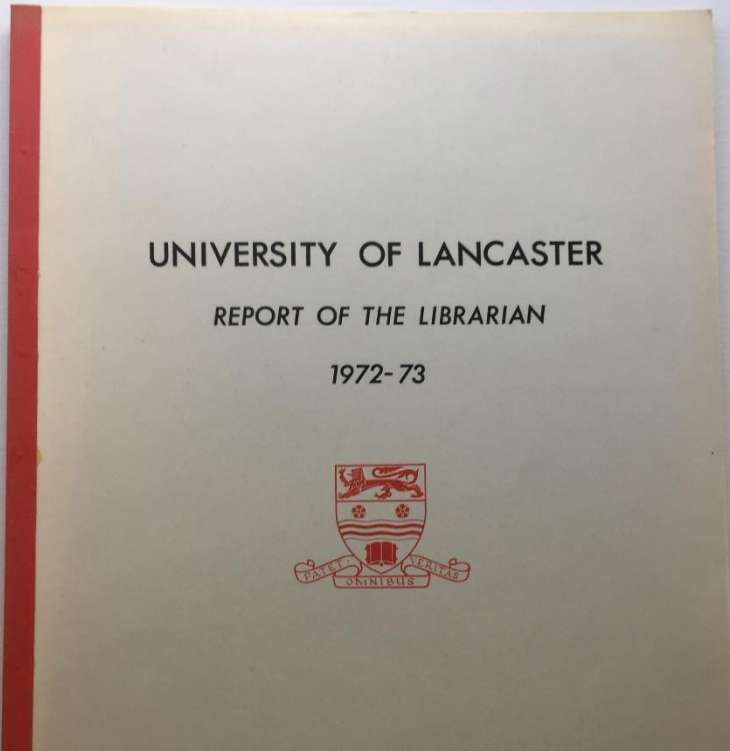
Jeanette Eldridge , Katie Fraser, Tony Simmonds,
and Neil Smyth

University of Nottingham

Faculty and School engagement
team



Annual reports and action plans



- Annual reports- draw on survey data including student satisfaction, library usage data,
- Report on activities including those specific to department
- Used by Faculty Librarians to report back on actions and draft proposed set of actions
- Discussions with Head of Department, Library Reps or at department staff meetings
- Identify key themes from discussions that inform more general library planning



01

02

03

04

05

06

Library report for ...

Library and study ...

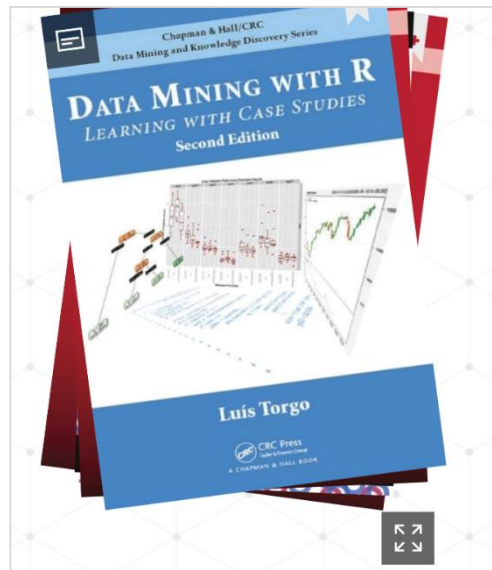
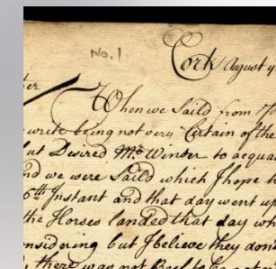
Library resources

Teaching and lear...

Research support

Community enga...

User experience a.



Faculty of Science and Technology

Teaching and learning support provided by Faculty Librarians and Learning Developers

Inductions	<ul style="list-style-type: none"> Welcome week sessions and inductions Maths Summer school <p>20+ sessions</p>
Teaching Sessions	<ul style="list-style-type: none"> Scientific writing for UG & PG international students Dissertation literature searching Weekly maths workshop & co-teaching sessions <p>190+ hrs</p>
Drop-in Consultations	<ul style="list-style-type: none"> Scientific writing zone Drop-in literature searching 1-2-1 consultations (Michaelmas and Lent terms) Maths drop-ins, boot camps and revision Piloting PASS mentoring scheme in SCC
Individual Support	<p>88 students</p> <p>133 hrs</p>

European Commission Eight Pillars of Open Science

- Rewards and Incentives
- Research indicators and Next-Generation Metrics
- Future of Scholarly Communication
- European Open Science Cloud
- FAIR Data
- Research Integrity
- Skills and Education
- Citizen Science

Lorraine Underwood @LMcUnderwood

Making robots at @CoderDojo @LancasterUni @LancasterUniLib

Takeaway boxes make excellent chassis

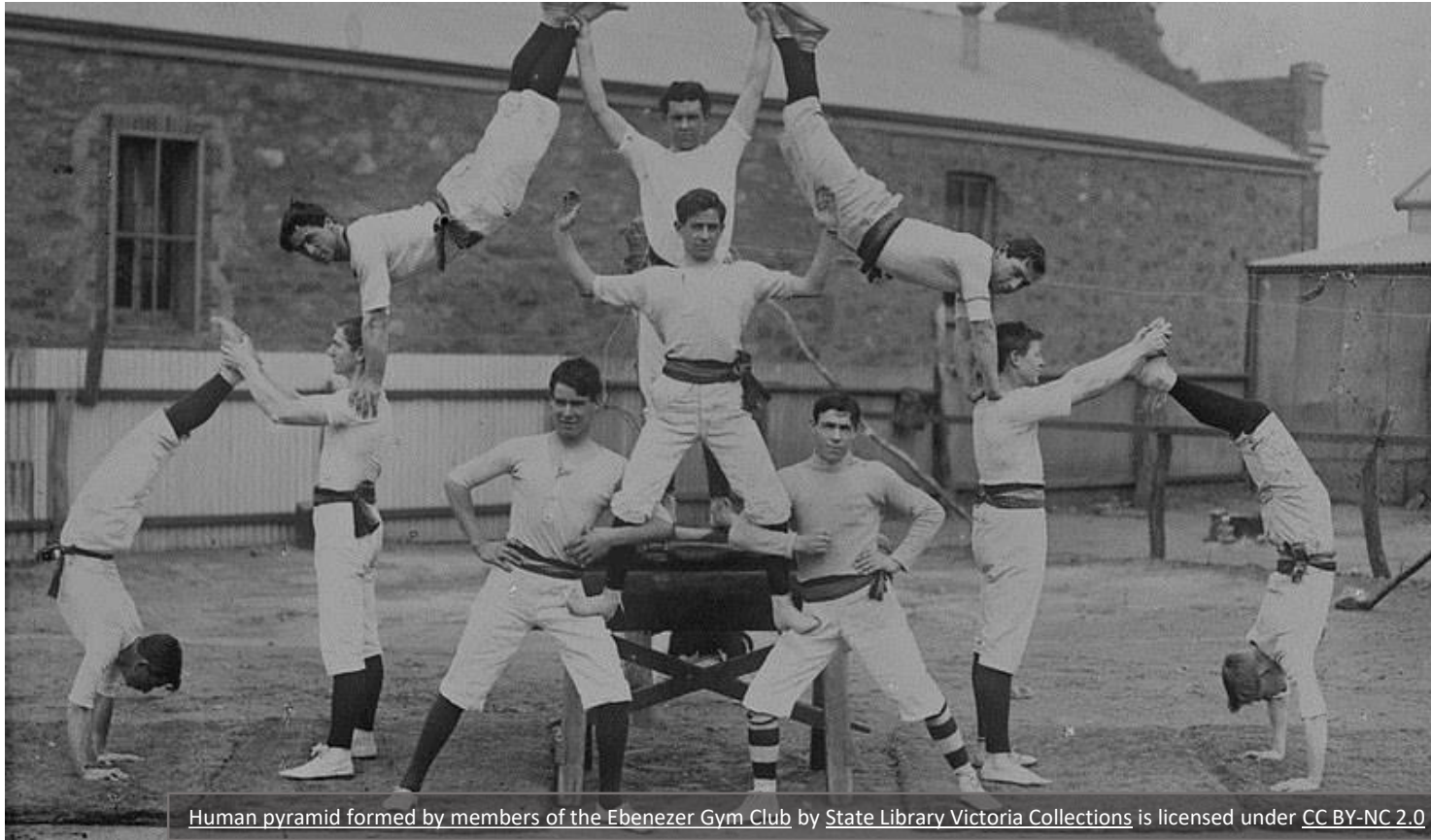
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See Lorraine Underwood's other Tweets

Interactive annual departmental Library Reports Lancaster

<https://sway.office.com/KLCqThQW5hhJSI03?ref=Link>

[Back](#)



Human pyramid formed by members of the Ebenezer Gym Club by [State Library Victoria Collections](#) is licensed under [CC BY-NC 2.0](#)

RM roles and structures

Does focusing on relationship management require that we change roles and structures?

Approaches to embedding RM in roles and structures



In 2013 University of Manchester Library undertook a significant reorganization of its liaison librarian teams, moving from a subject specialist focus to a functional model.

The big debate began!

Approaches

- Adapt or develop existing roles
- Add new roles with specific focus, e.g. research librarians, engagement librarians
- Specialist or functional teams
- Hybrid models of the above (Lancaster)

Which works best? You decide!

Engagement with Impact: Enhancing the student learning experience during year one of a functional library model

Steve Bull and Polly Harper
University of Birmingham

Functional model - advantages

Efficiency

Consistency of messaging and services

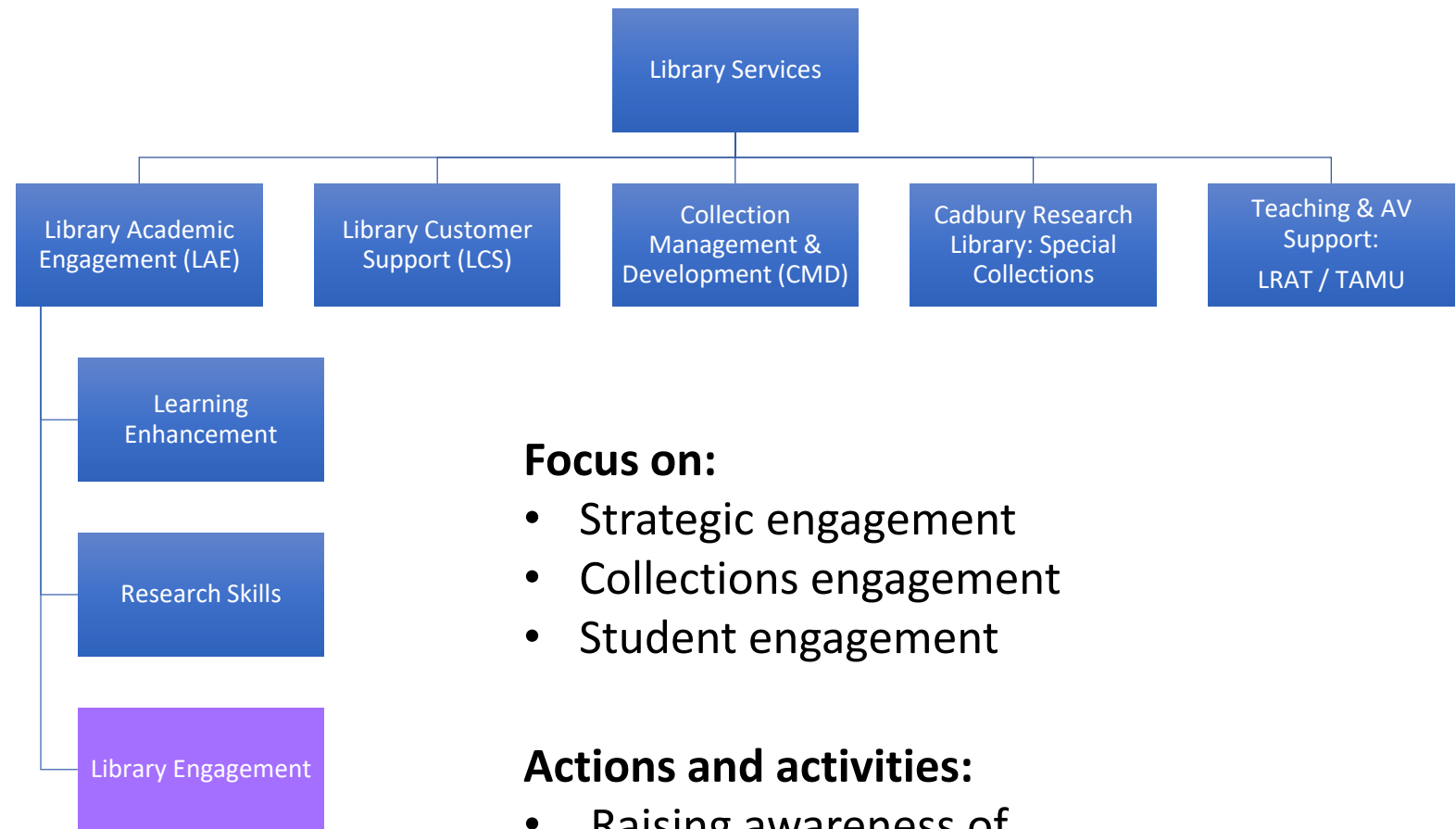
More time to focus on strategic
engagement

Functional model - disadvantages

Feeling of fragmentation

Collections/subject expertise lost

De-skilling?



Focus on:

- Strategic engagement
- Collections engagement
- Student engagement

Actions and activities:

- Raising awareness of learning enhancement offer
- Staff-Student committees
- Annual reports and action plans
- advocacy

Motivations for change

Subject vs. functional: Should subject librarians be replaced by functional specialists in academic libraries? Hoodless and Pinfield

Semi-structured interviews, 11 institutions - 4(5) Functional, 6 subject

Functional

- Consistency of provision
- New expertise
- Focus on institutional priorities
- Align with strategy
- Cultural change
- Budgetary / contingency issues
- Easier to make links with PS teams

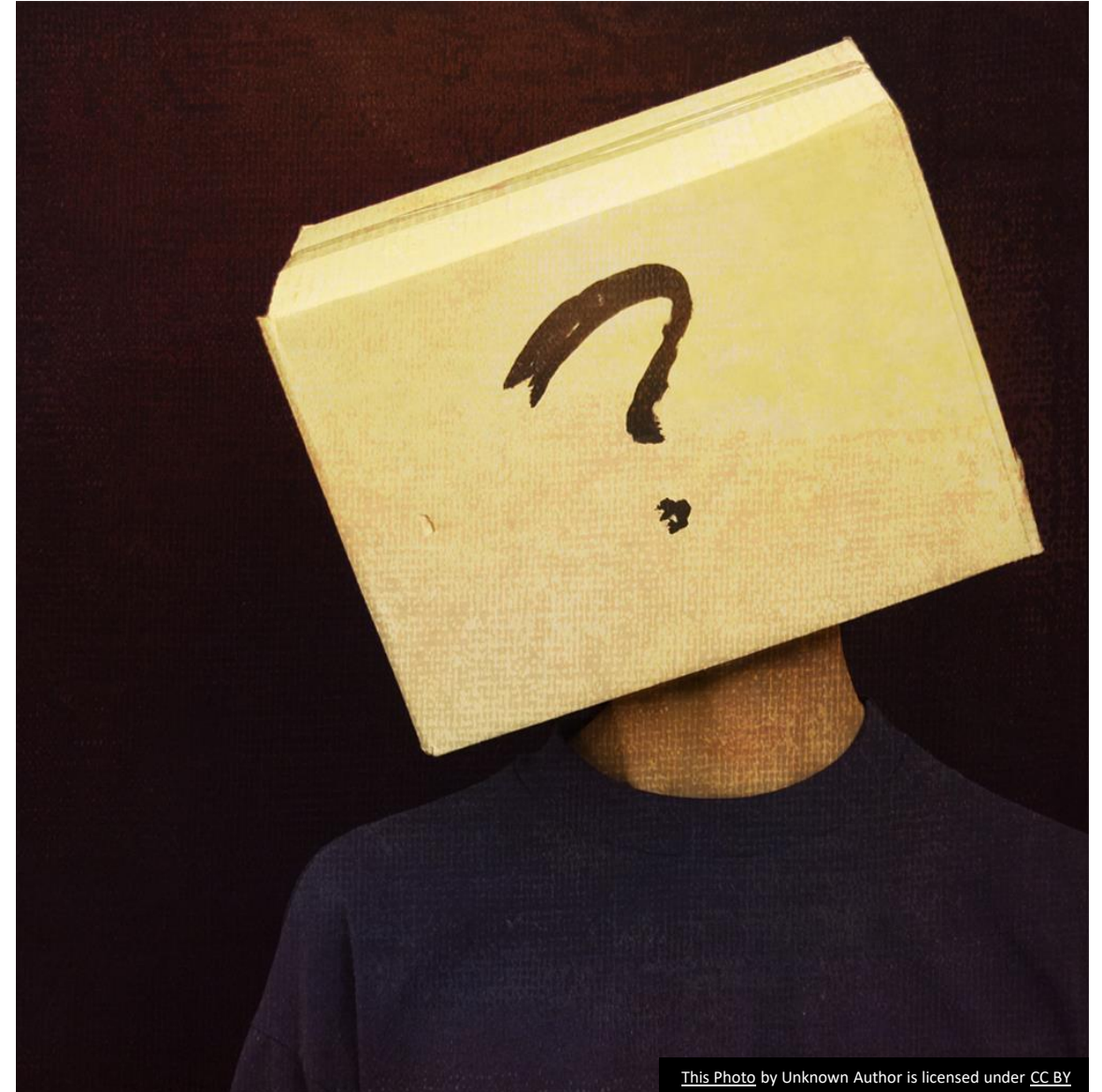
Subject

- Connecting with departments
- Providing tailored services
- Size of institution – large/func
- Providing subject expertise
- Anticipating resistance from staff

“Little consensus emerged apart from agreement that this is a major current debate impacting significantly on the future positioning of libraries in their institutions.” (Hoodless and Pinfield 2018)

What's my role?

- (Perceived) loss of connection – who is my librarian?
- Identity crisis, deskilling (reskilling) and letting go
- I'm not a spy, a saint or sales person – I might be an anthropologist, playmaker, peacemaker and advisor
- To maintain our individual and service identity we need to adhere to our values



What skills do we
need for RM

- Effective communication
- Confidence
- Emotional intelligence
- Agility
- Resilience
- Marketing skills
- Data manipulation
- advocacy



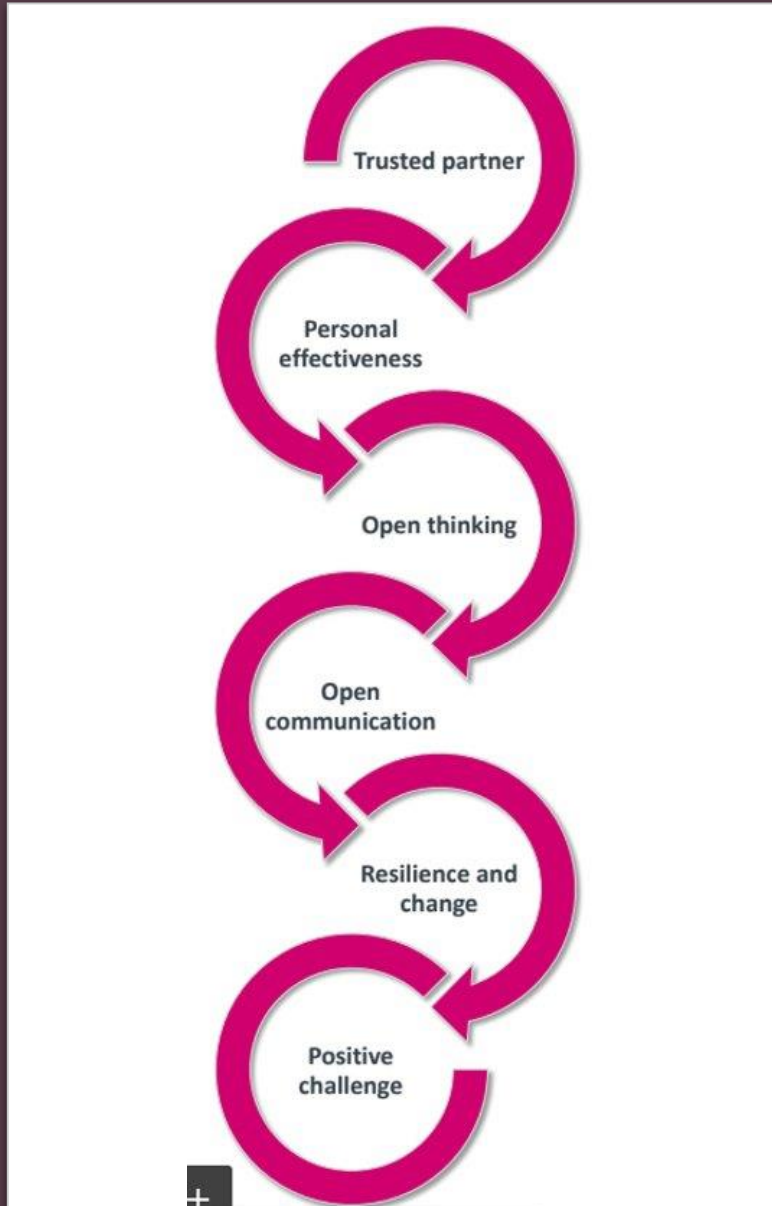
Analysis of current subject / liaison librarian job descriptions

Kerry Webb

University of Reading

37 similar job descriptions from individual UK HEIs – all revised in the last 4 years

- **Developing expertise in relevant subject areas** is seen as important in **40%** of the roles reviewed
- Experience of **delivering training/teaching** was the overriding requirement of **35 of the 37** institutions surveyed, 29 specifying this as 'essential'.
- Although **70%** of the job descriptions describe some form of **marketing or promotional activities** very few request previous experience or knowledge of this,
- Predictably, for a job involving 'liaison', **interpersonal and communication skills were the most essential requirement**, though in the vast majority of cases, these are still confined to 'excellent written and oral communication' skills.
- However, the need for a more complex set of communication skills is beginning to filter through to person specification criteria. 16 institutions also require **negotiation and/or influencing skills**, an 'essential' requirement in all 16 cases.
- Being **flexible, adaptable or having a positive attitude** to change is a requirement in 22 of the person specifications and is perhaps indicative of the increasingly pressured environment in which we work.



Soft skills: transforming staff, transforming relationships

Vanya Gallimore (@VanyaGallimore)
University of York

Competencies > Enablers > Staff development

Trusted partner – collaborative, trust, shared understanding, credibility

Personal effectiveness – integrity, agility, influence and advocacy, reflective practitioner

Open thinking – critical thinking, problem solving, creativity, open to new technologies and processes

Open communication – active listening, sharing of info, clarity and concision, non-verbal coms

Resilience and change – adaptability, conflict management, working under pressure, responsive to feedback

Positive challenge – Innovation and creativity, continual improvement, initiate change, willing to take risks



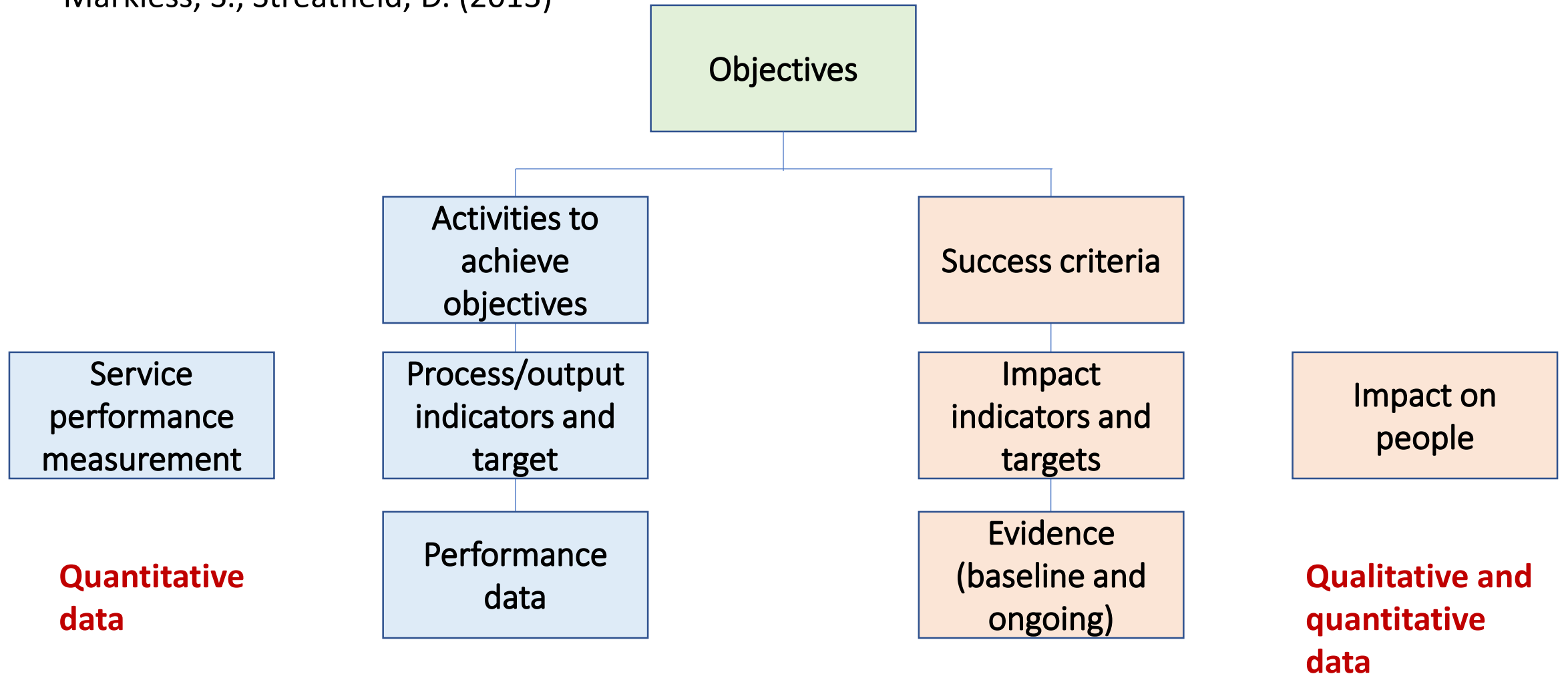
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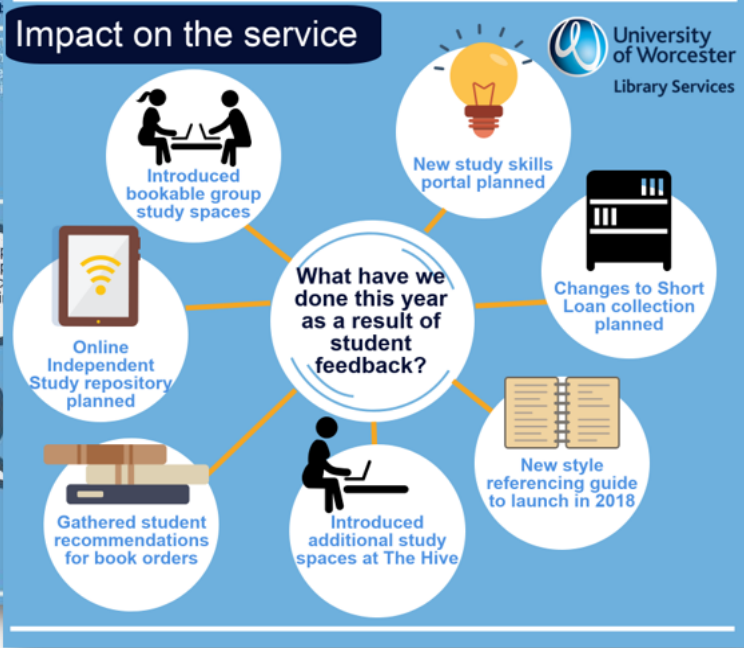
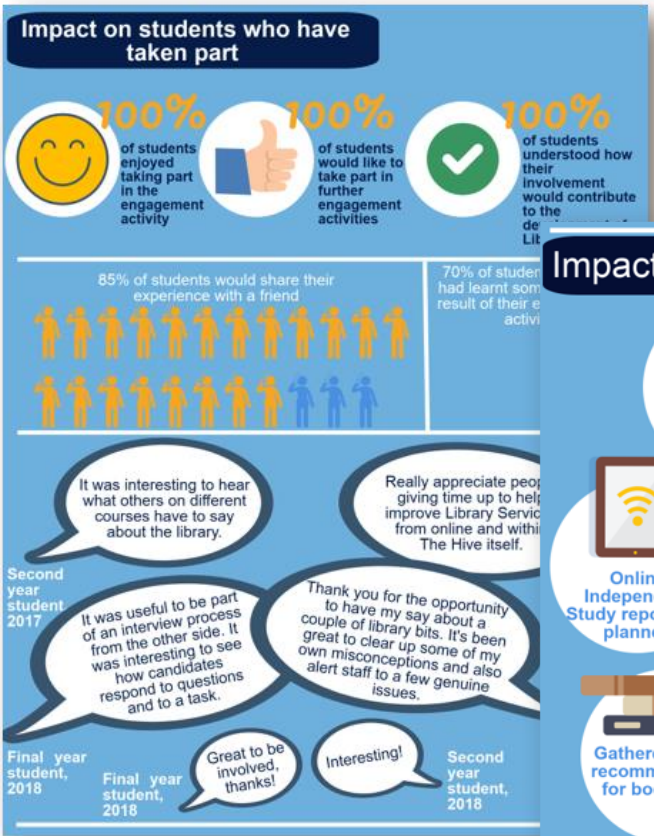
How do we know it is working?

- Lots of data but are we measuring the right things?
- Can we measure success?
- Planning to evaluate
- Tools and techniques
- An evidence based culture
- Telling a story, 'the rounded narrative'

Evaluating the impact of your library

Markless, S., Streatfield, D. (2013)





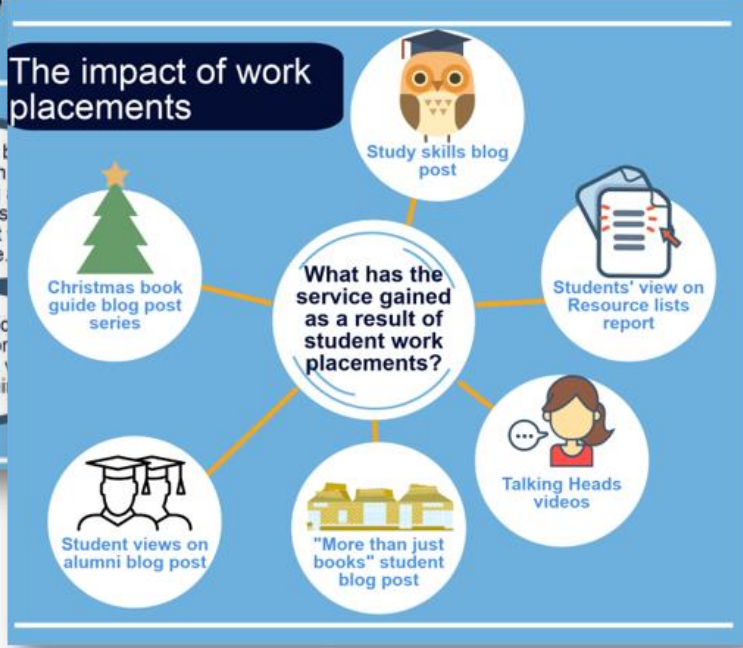
enjoyed working with all staff members as they are friendly and supportive.

I really enjoyed being independent in my project and being able to document my research in the ways that are best for me.

As a busy third year student this research has certainly changed how I engage with The Hive

I have thoroughly enjoyed working at The Hive on my placement project. The staff are very friendly and welcoming.

Working alongside a professional was very interesting but exciting for me.



Planning to measure impact

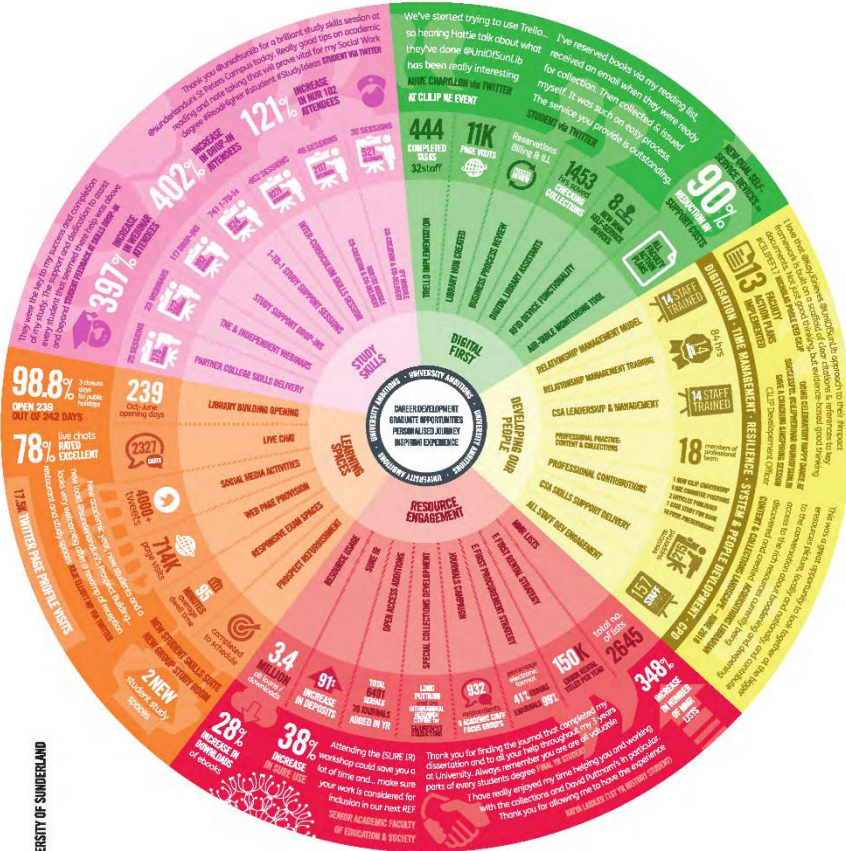
- Projects planned with impact in mind – short and long-term, including communication
- Impact evaluations are standardized – always look at aims, what we did, what we learned, how we acted, how we measured impact, how we communicated impact

Madalene George
 @madalene_a_g
 University of Worcester

Communicating success - approach

Kay Grieves (@KayJGrieves)
University of Sunderland

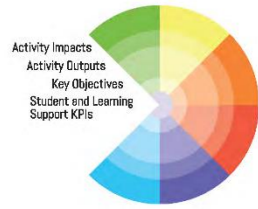
- 2017 introduced faculty action plans
- snapshot approach to evidence capture
- Facilitated conversations through a series of service-wide campaigns
- qualitative data of human experience combined with qualitative usage data
- Importance of involving staff and developing an evidence-based culture
- Graphical approach to annual reporting, insights through data visualization
- A 'rounded narrative' technique

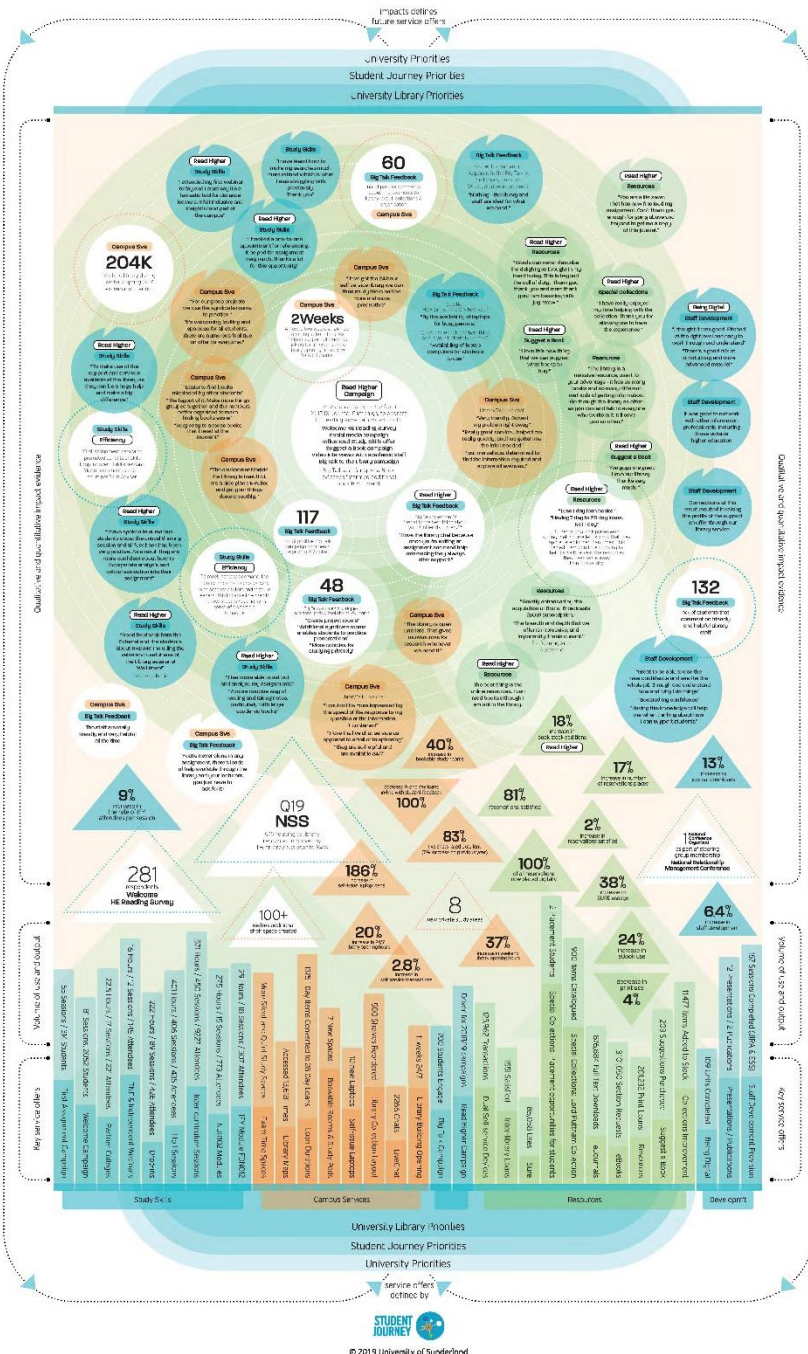


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Student Journey Annual Reports 2017/18 University Library and Study Skills

University Library and Study Skills deliver a range of services, spaces and support across our learning community. Our services are highly personalised, accessible and with increasing on-line presence and response; our collections blend both digital and print, providing customised resources supporting teaching, learning and research on and off-campus; our high quality and flexible library and learning spaces offer varied environments appropriate to changing needs within the academic lifestyle; and our skills support enables our learners to get the very best from our collections and develop lifelong learning and career skills. Together, and in collaboration with our community, our Libraries support our learners' engagement with their academic studies and underpin our University academic, research and graduate access.





Communicating success – benefits realised

- Providing meaningful data as the basis for strategic conversations and relationship Management
- Demonstrating value of engagement and contribution to institutional objectives
- Further investment in the service
- Aligning library and university strategic objectives
- Defining outcome-focused service offers
- Increased student engagement

Final thoughts

Relationship management makes a conscious shift from the academic support role to one of expert, active and trusted partner. 'They (liaison librarians) offer the campus more than support; they are partners and leaders, helping faculty and students to navigate a rapidly changing landscape.' (Jaguszewski and Williams, 2013, p.16)

It's not new, but it is different and it's still evolving (Phil)

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