

2013 Best Practices for Government Libraries

**Managing Evolving Resources:
Strategies, Capabilities, and Alternatives**



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The Information Services Office (ISO) at the National Institute of Standards and Technology (NIST) supports the research efforts of about 3,000 scientists and engineers at NIST's campus in Gaithersburg, Maryland. ISO supports NIST through three programs: the Research Library and Information Program (RLIP), the Electronic Information and Publications Program (EIPP), and the Museum and History Program.

Evolution of the ISO Lab Liaison Program

ISO's Lab Liaison Program began as a targeted library outreach program in 1997 focusing on bringing library expertise closer to the researcher in the lab and has evolved into today's program of collaboration between librarians and researchers working together to help increase NIST's reach and impact. The Liaison Program is an example of an action taken by ISO's leadership to create a sustainable, agile organization. It utilizes the skills and expertise of staff across the organization; the Liaison Program cuts across both RLIP and EIPP. The program has become a role model practice that can be emulated by other government and research libraries. It started with leadership's vision of what excellent customer service would look like.

Best Practices of Creating and Maintaining a Lab Liaison Program

Best Practice #1: The lab liaison program should fit with the vision and mission of the library and be a part of the library's strategic plan.

In 1997 ISO leaders realized that to achieve their vision, ISO needed a more collaborative relationship with customers. To move the organization in this new direction, the leadership created a Research Consultants Program. The goal of the new program was to take resident library and information expertise to the clientele and provide "a continuum of information support from the earliest stages of research discovery and activity and continues that support through the research conclusion and dissemination processes."¹ This required ISO to reconsider the way the Library did business and to provide information resources and services proactively rather than reactively. As an outreach program, the Research Consultant Program provided customized services, primarily through two librarians acting as Research Consultants. The Research Consultants became members of project teams in the labs, acting as contacts for literature searches and a variety of other research information requests.

¹ Paul Vassallo, The Knowledge Continuum: Organizing for Research and Scholarly Communication, *Internet Research: Electronic Networking Applications and Policy*, Vol. 9, No. 3, 1999, p 238.

Best Practice #2: Evaluate the library's strategic plan on a regular basis and make sure programs, including the lab liaison program, are moving in the desired direction.

Since 1997, the Liaison Program concept has been a major component of ISO's strategic plan. The strategic plan goals relating to the Program have evolved over time, but the importance of the Program to ISO's strategic success remains constant. Today the Program is at the forefront in furthering ISO's strategic goals "to help advance and position NIST research and publishing activities for maximum impacts" and "to increase the visibility and use of ISO services and resources."²

ISO looks at its strategic plan every year to make sure it remains in line with the mission and goals of the organization and continues to be tied to NIST's strategic plan. While the vision and mission generally remain consistent, ISO's goals and activities change as NIST moves forward.

In 2002, the Research Consultant Program evolved into the Lab Liaison Program. Today the Lab Liaisons partner and collaborate with NIST scientists and other technical staff on a variety of research activities. The Liaisons act as "strategic research partners" to build rapport with customers and to contribute their expertise to lab research and planning activities. They have created individual strategy plans that map out approaches tailored for communicating, educating, and working with their respective Lab or Program. While individual plans may differ in the methods and strategies, the goals of outreach and collaboration are the same.

The Liaisons are librarians assigned to NIST Labs and Programs to establish and maintain close working relationships with managers and scientists within these units. They serve as personal consultants to researchers and are the primary point of contact for their Lab or Program. Liaisons work directly with NIST researchers to assess the impact of their work, find the best places to publish to reach the right audience, gather and analyze market and industry data, and educate researchers about the advantages of using ISO's resources and customized services.

Best Practice #3: A successful lab liaison program requires the commitment and support of library leadership.

ISO's leadership is very committed to the Lab Liaison Program and places a major emphasis on the skills, expertise, and values required for success. These keys to success are achieved through the recruitment of new hires and through budgeting for training and professional development. Lab Liaisons receive training in the areas of analysis tools and techniques, report

² Barbara P. Silcox, Mary-Deirdre Coraggio, Susan Makar, and Mylene Ouimette, "Thriving Through Organizational Agility: The NIST Information Services Office's Baldrige Journey," ALA Editions (forthcoming).

writing, and data management, to name a few. It takes time to hire liaisons with the right expertise. This is particularly challenging in NIST's changing environment. ISO managers seek potential employees who are excellent communicators and have strong customer service abilities and values. Strong writing skills are needed to create customer reports and write detailed analyses. Liaisons typically have backgrounds in scientific/technical areas and substantial experience and expertise in information research and analysis. The Liaisons are professionally active in organizations such as Special Libraries Association (SLA), the Society for Scholarly Publishing (SSP), and the National Information Standards Organization (NISO). They may also be active in the professional societies important to their customers, such as the American Chemical Society (ACS). The Liaisons constantly strive to improve their skills through training and participation at conferences. Each Liaison, along with every other ISO staff member, has an Individual Development Plan (IDP) and these training and professional activities are part of the Liaison's IDP.

ISO leaders encourage each Liaison to develop their own recommendations for how to best interact with their assigned Lab and to develop appropriate products or services. This allows each Liaison to work creatively and independently to establish collaborative relationships within their respective Lab. It is, in part, this trust in the Liaisons' abilities and judgment that makes the Program a success. The Lab Liaison Program greatly enhances ISO's overall agility and ability to adapt to change because the Liaisons always have the pulse of their customers.³

Best Practice #4: Liaisons seek program feedback and input from their customers.

At the completion of each project, the Liaisons seek feedback from their customers. This can be as simple as a phone call or email asking the customer how they used the Liaison's work and what impact that work had on a project or program. This feedback is used to refine research analysis methods and to extend or plan additional products or services. The Liaisons record information about their collaborations, projects, and customer feedback using a central tracking tool. This data is reviewed regularly by the Liaisons and ISO leaders for purposes of strategic planning, enhancing or creating new products and services, and improving operational processes. The Liaisons play a critical role in collecting and analyzing data for ISO performance assessment and improvement. They use many listening posts to gather information about customers and as a result are able to suggest analyses or to develop information products in advance of customers' requests. After benefiting from these products, customers may return to ISO to collaborate on other projects.

³ Ibid.

The Liaisons have conducted many highly visible research and analysis projects on behalf of or in collaboration with their customers, such as analyzing publishing impacts for an entire NIST Lab; formulating publishing strategies to help the Labs achieve maximum impact; conducting comprehensive literature reviews that became part of researchers' papers, developing methods for researchers to share sources for hard-to-find scientific properties data; measuring relative impact against peer research institutions; and examining the state of scientific/technical research at U.S. universities to assess U.S. competitiveness in the global marketplace.

The Liaisons use a variety of mechanisms for establishing and maintaining relationships with customers, which offer more opportunities to obtain feedback and learn from customers. These mechanisms include attending and presenting at lab meetings, one-on-one meetings with bench scientists and lab management, addressing new employees at the NIST New Employee Orientation sessions, attending and contributing to lab events and special activities, and participating in NIST-wide committees. The Liaisons stay abreast of their lab's research and programmatic activities through their relationship-building mechanisms, by monitoring Lab/Program announcements and communications, and by hosting the monthly Research Library Board meetings.⁴

How ISO conducts analyses – best practices

Performing publication, citation, and impact analyses is an important and relatively new role for the Lab Liaisons. ISO has implemented several best practices for conducting analysis projects.

Best Practice #1: Liaisons conduct extensive customer interviews.

Lab Liaisons conduct extensive interviews with customers to make sure both the liaison *and* the customer understand the research question or request. As many librarians know, the initial customer request is not always the customer's real question. An important part of the interview process is getting to the real question, and then negotiating and agreeing on deliverables and deadlines. Sometimes it is necessary for the Liaisons to explain how the ISO review process is very similar to the review process required of researchers in the labs. Each operating unit (OU) at NIST is responsible for ensuring the editorial and technical quality of manuscripts originating from that OU. In the same way, ISO is responsible for the quality of its customer reports, which it delivers in the same professional manner as a technical report written by a researcher.

Best Practice #2: The Lab Liaison Program uses an established internal review process for writing and delivering customer reports.

⁴ Ibid.

ISO uses an established review process for any document delivered to an internal NIST customer or presented to an external audience. The extent of the review is determined by the audience. External publications and presentations undergo a very extensive review process similar to the review process used by researchers in the NIST labs. The review process for Lab Liaison reports delivered to internal customers undergoes a less extensive review, but no paper leaves ISO without a second set of eyes checking the work of a colleague. A senior librarian, who is also a Lab Liaison, reviews all analysis reports, literature reviews, and market reviews written by the Lab Liaisons. The Liaison's supervisor then reads the report. All customer deliverables are sent to the ISO Director so that she can keep abreast of the work of the Liaisons.

Best Practice #3: Lab Liaison team members collaborate with each other to meet customer needs.

A key component of the Liaison Program is the teaming and collaboration among the Liaisons. Each customer request requires the Liaison to evaluate resources needed to meet customer deadlines and specific needs. Since the Lab Liaison Team is made up of staff across all of ISO -- and not just Lab Liaisons -- the right expertise to tackle any project is always at hand. The team includes a program analyst, metadata librarians, a systems librarian, and a serials/e-resources librarian. Skill sets found across the team include analysis and writing, data collection and visualization, literature searching, and database expertise. Teams can form quickly to work on large projects, adding to the agility of ISO as an organization.

Best Practice #4: Customer reports are written using a formalized report structure and template.

ISO has developed a formal reporting structure for all its analysis reports that follows the organization of many scientific papers. Reports typically include the following four sections: Introduction, Methodology, Results, and Conclusions and Recommendations. Reports longer than three pages include a Table of Contents and those that are lengthy and information dense include an Executive Summary. This structure and organization give ISO reports a professional appearance, and they are organized in a way that scientists understand and appreciate. Liaisons work with a senior librarian, a fellow liaison, to develop project methodologies. This individual is available throughout the project to lend advice and expertise.

Best Practice #5: Liaisons regularly share and learn from one another as members of a Lab Liaison team.

Each Liaison understands the importance of collaborating and sharing knowledge with the other Liaisons. Meeting every other week, Liaison team members from across ISO have ample opportunities to share and learn from one another. They share information, strategies, and accomplishments. A

senior librarian leads the Lab Liaison Team meetings, calls for meeting agenda topics, and encourages participation by all attendees. Unique projects are often highlighted during the meetings so that everyone has an opportunity to share and learn from one another. An “around-the-table” meeting segment offers everyone an opportunity to do brief project updates or announce new projects. Meetings can easily evolve into in-depth discussions with Liaisons often working together to develop action plans or methods for meeting customer needs.

Final customer reports – publication and citation analyses, literature reviews, market reviews, etc. – are all posted to an internal shared drive that allows anyone in ISO to view and read the reports. Posting the reports in this manner also allows the ISO management team to easily review the work of their staff.

Lab Liaison meetings are also used as training sessions to learn about new analysis tools, methods, and resources. Liaisons often train each other and will develop in-depth training sessions for their colleagues. Most recently the Liaison team received instruction on research data management concepts and methods through a series of training modules developed by a team of colleagues that included both liaisons and other ISO staff members.

Conclusion

The Lab Liaison Program is poised for its next evolution, whatever that might be and wherever that may take the Program. The Liaisons will continue to lead and guide customers to help increase their reach and impact. They will continue to collaborate with customers and each other to meet the research and information needs of NIST scientists and engineers.