

# Using action plans to build partnerships at the University of York

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In January 2014 the Relationship Management Team (RMT) in the Information Directorate was reorganised at the University of York. New teams were created to develop services focusing on liaison, research and teaching and learning. The aim of the new RMT was to strengthen relationships with staff and students across the university by understanding and engaging in the new research and teaching environment at the University of York, and providing appropriate and targeted services and support.

Many institutions have started to move away from a traditional model of academic liaison and subject librarianship. Whether or not we are aware of it, relationship management has become a key part of what we do. The changing information landscape and new challenges higher education libraries face mean we need to think differently about how we can meet these challenges. Reports from RIN and RLUK have attempted to help institutions think about what services and skills are needed to operate in this new environment.

Our academic liaison team at York considered these reports and felt that it was too much to expect liaison librarians to develop these new skills on top of all they were already doing. The information landscape around us was changing and we felt that a new model was needed in order for us to address the inevitable challenges. About the same time we organised a White Rose visit – staff from Leeds, Sheffield and York universities visited the University of Manchester in order to understand more about the new model they were implementing. This model included a focus on engagement with the business of 'selling' the services of the library to academic departments.

We had a fairly traditional liaison model at York, with three subject clusters (which were like faculties). Each cluster had a team leader, and although there was some sharing within cluster groups, the model had resulted in duplication of work, inconsistent service delivery to departments and liaison librarians feeling they had to be experts in everything but without the means to do so. The move to a functional approach, which has been implemented at many UK higher education institutions, was adopted at York, and allows staff to specialise and develop expertise in one specific area.

Liaison is one of our key functions, and our structure gives our liaison librarians the time to focus on building meaningful relationships with academic departments, notably through the academic staff themselves, with an aim of reaching and influencing students through them. Simultaneously with the introduction of this model we developed annual library action plans. These are partnership documents with each academic department, outlining the work that we shall be undertaking with the department over the forthcoming year. These plans are formulated using data from our surveys (LibQual, National Student Survey [NSS], Postgraduate Research Experience Survey, Postgraduate Taught Experience Survey), knowledge from the liaison librarian (for example, from attending departmental meetings, meeting with staff), module feedback, department medium- and long-term plans and a range of library data (e.g. budget and how it has been spent, usage data). Liaison librarians use all this information to develop a draft set of actions, which are then discussed in meetings with the academic Head of Department, the academic library representative and the Head of Relationship Management or the Academic Liaison Team Manager. These discussions have proved invaluable and allow us either to confirm that the suggested actions are the right focus for the coming year or to change or add new actions based on department priorities which may have been previously unknown (sometimes based on the department's NSS results).

Each action plan is tailored to an individual department, using a common template. Initially they were essentially a Word document. However, they have been substantially developed to give more detailed data analysis to departments about the library, the investment we make in the department and

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their use of the library (by staff and students). Details include the amount of money spent on resources for the department, use of library resources (both print and electronic), number of reading lists submitted to the library, use of electronic texts, statistics on teaching sessions and use of our online subject guides.

In addition, we ensure that we provide a report on the progress of the previous year's actions, which allows us to highlight the work we've done and to raise any issues that have arisen.

In 2016 we shall be developing further, in order to contextualise the departmental data over time as well as against comparable departments; this may (or may not) be at the faculty level. We use a PowerPoint template that provides an easy-to-use tool that looks attractive (something that was commented on by many departments). Departments can (and do) use these documents at their medium- and long-term planning reviews to demonstrate engagement with the library.

We have been fortunate in getting all departments on board. In the first year of action plan meetings, all but one department met with us. The following year we met with all departments. The value of the meeting is recognised by departments, as we develop shared priorities for partnership working. We have honest and open conversations about the issues in each department, and most departments are realistic about the limit of what we can achieve. This approach has resulted in even closer working relationships and a more detailed understanding of how departments work (and the sometimes subtle differences between them). Our engagement is becoming more meaningful; we are viewed as a trusted partner and are therefore able to tailor our communications to individual departments. For example, our subscriptions review process (never a popular exercise when we are not able to increase the amount we spend on journals) had the highest level of engagement for years in 2015, and enabled us to cancel 52 titles (up from ten the year before), thus allowing us to subscribe to 57 new titles (up from twenty the year before). This means that our current titles are now more aligned with the university's current teaching and research priorities.

After all action plan meetings have happened, we identify the key themes, identify which departments we need to work with in these areas and where there is commonality to work across a group of departments. The key themes over the last two years have been teaching and learning (integrating digital literacy skills and providing support), collections management (creating a collection profile to gain better understanding of usage of the collection or undertaking a gap analysis – e.g. where we need to support a new teaching / research area), research support (open access publishing, increasing awareness in the department), and the physical environment (how space is being used).

The Head of Relationship Management and the Academic Liaison Team Manager collate this information to establish the volume of work and priorities. We are realistic about how many initiatives we can take on with any one department and ensure that no one liaison librarian (they are each responsible for 3-4 departments) is involved in too many initiatives. Priorities are then discussed with other senior managers as part of our wider planning discussions to establish what work will be done and likely timescales

Finally, in order to ensure both that liaison librarians can keep track of their actions and that everyone else across the wider library service knows what is happening, we have developed a centralised spreadsheet of actions to which updates can be added. In addition, we have developed our own customer relationship management (CRM) database where all our interactions with departments are captured, so we have a holistic picture of what is happening across all departments. Further information on our CRM will be reported at the

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First Relationship Management Conference in higher education in November at Stirling and an article will be published as part of the Northumbria Conference Proceedings.

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