Crafting Competencies, Creating Culture: Using Core Competencies to Navigate Departmental Mergers

Melissa S. Jones, Sandra R. Hussey, Jennifer C. Boettcher, and Anna Simon

abstract: Staff reorganizations and department mergers are common strategies libraries use to respond to changing needs and economic pressures. To make organizational changes work well, however, librarians need to consider how best to bring people on board and enable them to thrive in the new environment. This article argues that the creation of a core competencies document, developed by the staff themselves, helps establish a common culture for a successful merger. A relevant, living document should include mechanisms for assessment and revision and should encourage personal and professional growth. Core competencies—the skills or attributes that people need to carry out their work effectively—can articulate shared values that will empower staff to advance the library’s mission.

Introduction

Change is a constant feature of most libraries. Libraries frequently undergo changes brought about by reimagining services, reinventing organizational identities, and reorganizing librarians and staff to accomplish new goals. A strategic plan or mandate may set things in motion, but often the impetus for change is happenstance: some important individual leaves, the budget is slashed, or a donor funds a new center, and suddenly the library needs to adapt. Libraries have also made evolutionary changes in response to user needs and in anticipation of new growth. For example, many libraries have eliminated government documents departments. Library media centers have expanded beyond audiovisual equipment and collections to provide emerging multimedia services and collections. Special collections and original primary sources have taken on new focus and prominence.

As budgets shrink while demands on library space and staff time increase, the economics of running a twenty-first century library often require librarians to rethink...
roles, structures, and priorities. Additionally, libraries are pushed to change by technological innovations and user expectations. Libraries must play catch up with their services while simultaneously divining the future, using internal assessment data and external reports from such organizations as Ithaka S&R, the Association of College and Research Libraries (ACRL), and Horizon to support decision-making. By extending resources to support newly popular spheres, such as digital and open access collections, scholarly communication, community engagement, data curation, and primary sources, libraries may have to reallocate resources away from historic priorities.

At Georgetown University Library in Washington, D.C., the Research and Instruction Department merged with the Collection Development Department in 2013 to consolidate and maximize staff resources. Leading up to the merger, librarians in both departments began to fill the same set of job responsibilities, though with differing emphases. Every librarian in the two departments had responsibilities for reference, library instruction, collection development, liaison work, and professional development. Those areas had been added over time, however, and were weighted differently across individual job descriptions. Although the two departments had significant commonalities, they were separated by differing philosophical perspectives. The Collection Development librarians understandably oriented their work around the creation and management of library collections, while the Research and Instruction librarians focused heavily on providing face-to-face research support. Knowing that we were united in our core functions but divided in how we oriented ourselves, we resolved to create a statement of departmental competencies as a means of developing a shared understanding for our work and establishing a common culture in the new Collections, Research, and Instruction (CRI) Department (since October 2018, the Research Services Department). A secondary goal was to clarify the department’s contributions to the library and the university at large.

To accomplish these goals, a working group tasked with creating a list of shared competencies was formed following the merger. Those core competencies would play a crucial role in establishing the norms and culture for the newly formed department.

Department mergers are not unique to Georgetown. Similar mergers have taken place in libraries across the country, many of which reflect the ongoing debate over how best to serve our constituencies. For example, the University of Arizona Libraries in Tucson reorganized in 2007 to eliminate subject specialists in favor of positions devoted to such areas as teaching, resource management, outreach, and digital management. As traditional print collection development practices are supplemented and sometimes replaced by demand-driven acquisition, traditional acquisitions and collection departments have been particularly susceptible to restructuring.
acquisition, traditional acquisitions and collection departments have been particularly susceptible to restructuring. In 2013, the University of Kansas in Lawrence overhauled its approach to collection development by shifting responsibilities from 30 subject librarians to 7, creating a new department titled Content Development. Similarly, Southern Illinois University Carbondale removed collection development responsibilities from the liaison librarians and created three new librarian positions to assume this work. The University of North Carolina at Chapel Hill streamlined budget processes and encouraged interdisciplinary purchasing by merging the Reference and Collection Development Departments to unite 30 librarians into one department called Research and Instructional Services, organized into broad disciplinary teams.

While helping streamline workflows and trim bottom lines, reorganizations may not necessarily take the best advantage of the skills, abilities, and values of the librarians involved. For Georgetown, our merger created space for us to reaffirm values, focus on skill development, and highlight our relationships with our constituents. The statement of core competencies also gave us a shared basis from which to move forward as a unified department. Because the declaration of core competencies fostered a growth mind-set, librarians were poised to anticipate and adapt to needs as they develop.

Because the declaration of core competencies fostered a growth mind-set, librarians were poised to anticipate and adapt to needs as they develop.

Core competencies been used in various disciplines from psychology and law to business and human resources. While no universal definition exists, the idea of a critical skill set unique to an organization—rather than an individual—was first introduced in the Harvard Business Review to capitalize on the entirety of a company’s distinctive knowledge base. Used as a theory for guiding organizations through innovation and changes in a shifting environment, core competencies soon spread from the private sector to library management. The concept began to appear in the library literature through articles and book chapters by Joan Giesecke and Beth McNeil that addressed using competencies to develop and train staff. As libraries have developed in the twenty-first century, it has become increasingly common to link core competencies to strategic planning. While much of the library literature on core competencies describes a top-down approach to developing and implementing competencies, the CRI librarians at Georgetown instead took a grassroots approach, initially creating competencies based on position descriptions and later crafting a department-wide mission statement that linked the core competencies to the library’s mission and strategic goals. By developing competencies among peers rather than receiving them from managers or administrators, the project gained a greater level of buy-in from the librarians involved.

The department tasked a small working group to identify and draft the competencies. The CRI Core Competencies Working Group surveyed existing competencies and professional standards as well as relevant scholarly literature to see if any existing
documents could be adopted or adapted for the department. Acknowledging that the library profession already has many well-defined professional standards, the working group surveyed existing professional standards, guidelines, and competencies. While each document addressed aspects of our professional responsibilities, none provided a holistic view.

Our work as instruction librarians was covered by such documents as ACRL’s “Characteristics of Programs of Information Literacy That Illustrate Best Practices: A Guideline” and “Standards for Proficiencies for Instruction Librarians and Coordinators: A Practical Guide.” Likewise, professional standards for reference work are dealt with in the Reference and User Services Association (RUSA) “Guidelines for Liaison Work in Managing Collections and Services,” “Guidelines for Behavioral Performance of Reference and Information Service Providers,” and “Professional Competencies for Reference and User Services Librarians.” Even broader documents such as the Special Libraries Association’s “Competencies for Information Professionals of the 21st Century” and the American Library Association’s “Core Competencies of Librarianship” failed to sufficiently address competencies for collection development. The compilation of these and other professional standards amounted to an unwieldy and unattainable list of expectations. Surveying the existing standards ultimately solidified our decision to create our own competencies rather than adopt an existing document.

In developing our document, we found the “Iowa Framework for Liaisons/Subject Librarians” to be particularly helpful as a model that we paired with library literature on the changing roles of liaison librarians, trends in academic libraries, and professional standards. The resulting customized competencies correlated with the broad job responsibilities that all librarians in the unified department held in common: liaison/outreach, instruction, reference, collection management, and professional development. For each broad area, we provided a definition, identified high-level competencies, and listed “in practice” statements to show how competence could be demonstrated (see Appendix A).

Because our document needed to encourage and foster professional development and establish a shared identity rather than serve as an instrument for evaluation, each competency was crafted to be descriptive—illustrating some ways a librarian could grow in these areas—rather than prescriptive. The following is an example of one collection management competency along with the in-practice statements that suggest ways of demonstrating personal competence:
Collection management competency 2: Understands user needs and environments in assigned disciplines.

In practice:

- Works closely with faculty members and students to learn the structure, size, and scope of assigned programs as well as associated values, interests, research tools, and methodologies.
- Writes impact statements for new programs as needed.
- Develops subject-specific collection development policies and promotes collection use.

A librarian seeking to develop in this area could do so by focusing on one of the “in practice” examples or by identifying additional ways to demonstrate competence.

Since each competency aligns with specific areas of responsibility and includes pragmatic suggestions for self-assessment and goal setting, the document provides actionable ways for each librarian to grow and develop in his or her position. While the competencies highlight knowledge, skills, and abilities held in common, they also include the unique strengths each librarian contributes. For instance, all librarians should acquire the specialized knowledge required to support their subject areas, but for some, specialization may be evidenced by learning foreign languages, while others may develop proficiency in such programs as geographic information systems (GIS), or such research methods as text mining (liaison competency 8). Each librarian has the autonomy to choose an appropriate development path and to grow over time in areas that are essential to the success of the individual and the department. As the department’s librarians grow and develop across the competencies, we strengthen our work as individuals and as a unified department.

Impact of Competencies

Since their approval and implementation in July 2014, the CRI core competencies have not collected dust on the shelf. Rather, they have been used in creating individual goals, training newly hired librarians, developing and revising position descriptions, clarifying CRI librarians’ roles in the library, and communicating about our department’s work with faculty.

The competencies have not only defined the new department but also highlighted individuals’ contributions to the whole organization. On the one hand, they initially helped define our identity as a cohesive department and helped us consider how we intersect with the library as a whole. By defining the core of what we do and who we are, we have a framework from which to operate within current pressures to do even more considering constraints upon our resources. On the other hand, the competencies
have also served to highlight the strengths each person contributes to the department. While showing us areas where we can grow and improve as professionals, the competencies also create space for individuals to develop expertise and deep knowledge that can, in turn, benefit the whole department. We may not all need fluency in Russian, but having a colleague with specialized language skills provides a richness to the knowledge and services our department offers.

The CRI core competencies have been used to develop new position descriptions and rewrite ones in the department. Immediately after their adoption, the competencies were used to craft a position description for the public policy and social sciences librarian in August 2014. The description and individual job accountabilities were modified to reflect the expectations delineated in the core competencies. Notably, the previous position description had separate accountabilities for collection development and collection assessment, management, and evaluation. The revised description merged those two areas into one accountability for collection development. A new accountability for liaison work was also added to reflect the importance of working beyond the library’s walls with the faculty and students.

In fall 2015, all librarians in the CRI Department were asked to revise their position descriptions. The revised descriptions were to reflect the unified work of the merged department as described by the core competencies. As a result, all librarian position descriptions manifest the priorities outlined in the core competencies: liaison/outreach, instruction, reference, collection management, and professional development. Norming our position descriptions has helped reinforce the shared work of the department while retaining the unique knowledge, skills, and abilities each librarian contributes to the organization and has helped CRI librarians to understand their colleagues’ strengths.

Another early benefit of the CRI core competencies was its acknowledgment by the library as a useful model for developing library-wide competencies for Georgetown’s professional librarians. In October 2014, the CRI core competencies were presented to all Georgetown librarians, which resulted in a new working group charged with developing competencies based on the knowledge, skills, and abilities that should characterize all Georgetown University librarians. Approved in May 2015, the Georgetown University librarian core competencies focused on four areas common across all departments and divisions: (1) general knowledge and skills, (2) outreach, (3) professional development, and (4) technological knowledge and skills. The document also included a fifth area—management and administration—for librarians with managerial or administrative responsibilities. Following the CRI model, this document defined specific competencies and provided “in practice” statements, which serve as examples of ways competence can be demonstrated. These library-wide competencies are used “to create accurate position descriptions, recruit competent librarians, provide uniform professional standards, and establish benchmarks for professional development” and effectually influence the shape and quality of the library’s workforce.
Building on the CRI core competencies, the department crafted a mission statement in 2016, which was approved and adopted in January 2017. To help set the direction for the department, the mission statement is purposefully forward-looking and attempts to identify future trends related to engagement, research and collections, instruction, and professional development. The Collections, Research, and Instruction librarians will implement the university’s and the library’s missions by manifesting the core competencies in their day-to-day work, whether by providing services and collections that further the research, teaching, and intellectual needs of their various constituencies; by shaping and contributing to library goals and strategic directions; or by sharing their expertise. Together, these two documents have helped clearly articulate the department’s role in the library and the university.

As outlined in the CRI core competencies, the department began to review and revise the document in fall 2017 to reflect changes in the department’s focus and composition. For instance, when the competencies were initially written, assessment was not a focus of the library. Since 2014, however, assessment has become more central, and the department now houses a librarian whose appointment is jointly in CRI and the new Library Assessment Department. Rather than adding assessment as a new accountability, it will be woven into the existing five areas, showing how this new emphasis is integral to the department’s work.

The CRI core competencies have been instrumental in creating a shared culture and in defining the department’s role within the library, and they remain relevant to our daily work. With the recent revisions to the competencies, the CRI librarians decided that they would benefit from deeper consideration of the five core areas that comprise their work. The department intends to devote a series of meetings to discussing each of the five competency areas to establish a more coordinated approach to them. These conversations will allow the department to frankly discuss and make decisions about more philosophical questions facing subject librarians: Do we as a department embrace the ACRL “Framework for Information Literacy for Higher Education”? Are we interested in the Universal Design for Learning, a set of principles to improve teaching based on scientific insights into how people learn? What is our shared philosophy of reference and research services? Considering budget and space constraints, what are our priorities for collection development? The results of these discussions will continue to shape the focus and role of the CRI librarians and will help to ensure that the list of core competencies is truly a living document.

At Georgetown, the merger had utility beyond consolidating departments and streamlining operations. It gave us a chance to reflect on our value to the organization and to articulate that value in meaningful ways. The process of developing the core competencies created greater unity and purpose in the department, while simultaneously highlighting the talents and expertise brought by individual librarians. As the library
landscape continues to shift, the competencies will help us be more resilient and better equipped to navigate change.

Takeaways

Other libraries needing to develop their own core competencies document may find, as we have, that how the declaration is crafted is as important as the final document itself. While the library profession has abundant lists of competencies and standards, librarians may benefit from developing their own competencies that reflect the focus and mission of their particular library. Those who wish to craft department- or library-specific competencies may benefit from the following practices:

- Identify the motivation for developing competencies. Competencies designed to bring unity, shape identity, communicate contributions, create culture, aid in annual evaluation processes, or set benchmarks for training may all take a slightly different shape.
- Consider developing competencies from the bottom up as a means of empowering staff and cultivating buy-in.
- Involve colleagues in the process of drafting the competencies and provide meaningful opportunities for feedback along the way.
- Consider crafting department-specific competencies alongside library-wide ones as a means of acknowledging the unique contributions of each part of the library.
- Take what is helpful from existing standards, guidelines, and competencies where appropriate, and leave the rest. As you consider what to include, keep the overall length of your competencies in mind so as not to heap undue burdens on your colleagues or staff.
- Incorporate and respond to such internal documents as position descriptions and organizational mission, vision, and values statements so that your competencies align with the direction of your parent institution.
- Build a mechanism for reviewing and updating your competencies at regular intervals so they retain their relevance.
- Integrate the competencies into other mission-critical and operational documents.

Competencies may differ from library to library and from department to department within a given library. Regardless of their specific contents, any competencies need to reflect and guide the work done at that institution. Perhaps of most importance, take steps to ensure that your competencies are lived documents and play a meaningful role in the day-to-day work of your librarians and staff.

Melissa S. Jones is the English and humanities librarian at Georgetown University in Washington, D.C.; she may be reached by e-mail at: melissa.jones@georgetown.edu.

Sandra R. Hussey is the library research instruction coordinator at Georgetown University; she may be reached by e-mail at: husseys@georgetown.edu.

Jennifer C. Boettcher is the business and economics reference librarian at Georgetown University; she may be reached by e-mail at: boettcher@georgetown.edu.
Introduction

This document outlines core competencies for the professional librarians in the Collections, Research, and Instruction Department (CRI) at Georgetown University. It defines the competencies delineating our professional roles and responsibilities in order for us to create accurate position descriptions, recruit competent librarians, provide uniform professional standards, and establish benchmarks for professional development. The competencies are grouped into the five accountabilities common to all CRI librarian position descriptions: (1) liaison/outreach, (2) instruction, (3) reference, (4) collection management, and (5) professional development. The individual competencies tend to be conceptual in nature and are followed by “in practice” statements, which elucidate the ways in which each competency is demonstrated.

These competencies work in conjunction with the library-wide “Academic and Administrative Professionals Core Competencies” and are intended to clarify and provide detail for the CRI librarian positions.

While they identify and define commonalities among the CRI librarian positions, the core competencies are intended to complement, not replace, individual position descriptions. Likewise, the competencies are not evaluative; they are not intended for use in the formal annual performance review. They may, however, be used by individual librarians to identify potential annual goals. The competencies should encourage reflection and self-assessment leading to training, professional development, and excellence of service to the library and the university. Individuals are encouraged to develop their skills and knowledge beyond the core competencies.

These competencies were informed by current professional standards, guidelines, and competencies along with professional literature, which are listed in Appendix B and C.

The core competencies are a living document and will be reviewed every two years or more frequently as needed. Review often occurs section-by-section, but sections need not be reviewed in order, especially when changes in the library environment prompt different competencies in our work.
Liaison/Outreach Core Competencies

Liaison work is the process by which librarians involve the library’s clientele in the assessment, evaluation, and augmentation of collections and library services. It includes identifying user needs, evaluating and promoting existing collections and services, and locating resources that will enhance these offerings. Liaison work enables the library to communicate its services and policies to its clientele while enabling the constituency to communicate their needs and preferences to the library staff and governing body. Liaison work promotes the library’s strategic goals and enhances its public relations (note: adapted from the Reference and User Services Association [RUSA] definition of liaison work). Core competency skills for liaison and outreach work were adopted and modified from the University of Iowa’s “Iowa Framework for Liaisons/Subject Librarians.”

Instruction Core Competencies

CRI librarians need the skills, knowledge, and abilities “necessary to create library instruction and information literacy programs that meet curricular demands,” according to the ACRL “Standards for Proficiencies for Instruction Librarians and Coordinators.” CRI librarians should be fluent with the professional dialogue surrounding instruction, including areas of debate. The mission of the Library Research Instruction Program is to advance researchers toward expertise. These researchers include undergraduate students, English as a foreign language students, graduate students, and faculty. Additional audiences include university staff and special groups. Through the Library Research Instruction Program, librarians enable Georgetown University students, faculty, and staff, and other constituencies to exploit the libraries’ research resources and services.

Reference Core Competencies

The reference librarian’s role is to “assist, advise, and instruct users in accessing” all types of knowledge, regardless of inquiry format, resource format, or patron’s level of expertise, according to the Reference and User Services Association (RUSA) “Professional Competencies for Reference and User Services.” Reference librarians develop their knowledge of local collections and hone their research skills in order to ascertain each patron’s information needs and to connect each individual with appropriate resources or specialists. Subject specialists develop deep knowledge of assigned areas to provide expert research services.

Collection Management Core Competencies

Subject specialists build and manage collections for study and research by working with the university community to assess current and future research, teaching, and learning needs. Librarians develop and evaluate collections in light of academic program demands and scholarly trends as well as user feedback. Librarians develop cohesive local and consortial collections, and maintain the viability of the collection through retention, acquisition, and preservation. Subject specialists maintain or develop expertise in the disciplines they manage.
<table>
<thead>
<tr>
<th>Liaison competency 1: Actively engages with faculty, students, and staff in assigned areas, developing strong working relationships.</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>In practice</strong></td>
</tr>
<tr>
<td>Communications on a regular basis with the appropriate constituencies for librarian collection development areas: faculty, student groups, and support staff (such as the department administrator). Communication can take place via e-mail, in person, at department meetings, etc., and can be a combination of both formal and informal. Communication should minimally include beginning of the semester introductions and end-of semester check-ins, as well as periodic promotion of services and collections (such as databases, website features, and acquisitions).</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Liaison competency 2: Promotes current services and collections.</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>In practice</strong></td>
</tr>
<tr>
<td>Inform faculty, students, and appropriate staff when new resources are acquired or services are offered, asking for feedback to improve services and collections. Underutilized resources and services can also be promoted to increase visibility and use. Communicates library policies and procedures to faculty and students. Provides information on library initiatives, such as data services, copyright, scholarly communication practices, and Digital Georgetown, as appropriate.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Liaison competency 3: Analyzes trends in departmental teaching and research programs, stays abreast of scholarship in the disciplines themselves, and uses this knowledge to respond to departmental needs.</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>In practice</strong></td>
</tr>
<tr>
<td>Works with appropriate department point people to monitor course offerings and department curricula, noting shifts in academic and pedagogic practices. Modifies library instruction, collection choices, and general liaison support to match the changing academic needs of the department, innovating new approaches as necessary.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Liaison competency 4: Works closely with faculty and students to understand their changing workflows and patterns of scholarly communication.</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>In practice</strong></td>
</tr>
<tr>
<td>Monitors changing habits and approaches to scholarly communication in assigned disciplines by working closely with area faculty and students via research consultations, library instruction, correspondence, attending department meetings and events, etc.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Liaison competency 5: Seeks participation in academic departments.</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>In practice</strong></td>
</tr>
<tr>
<td>Is available as a supportive member of the departments, as the situation allows. Asks to participate in or attend department meetings; attends annual department events, screenings, readings, presentations, colloquia, etc. Attends some larger campus events in which assigned departments may play a role.</td>
</tr>
</tbody>
</table>
Table 2.
Instruction core competencies

<table>
<thead>
<tr>
<th>Instruction competency 1:</th>
<th>Collaborates with faculty to integrate library research concepts and skills into the curriculum.</th>
</tr>
</thead>
<tbody>
<tr>
<td>In practice</td>
<td>Communicates effectively and professionally with instruction coordinator, librarian colleagues, faculty using multiple modes (face-to-face, e-mail, etc.). Develops knowledge of pedagogical practices to recommend appropriate learning objectives and activities. Is familiar with courses and curriculum in relevant subject departments and has a general awareness of Georgetown departments and programs. Is aware of common/current assignments in liaison areas.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Instruction competency 2:</th>
<th>Designs and creates effective learning materials.</th>
</tr>
</thead>
<tbody>
<tr>
<td>In practice</td>
<td>Constructs clear, accurate, and readable instructions, worksheets, research guides, and other teaching materials. Uses appropriate technology to accomplish teaching tasks. These may include OfficeSuite programs (PowerPoint, Word, Excel), classroom technologies, Internet resources, learning management systems, or other tools as appropriate for the session. Creates basic online tutorials using screen capture technology. Assesses the effectiveness of learning materials.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Instruction competency 3:</th>
<th>Designs and teaches effective instruction sessions and research consultations.</th>
</tr>
</thead>
<tbody>
<tr>
<td>In practice</td>
<td>Is familiar with the profession’s information literacy objectives, standards, and frameworks. Recognizes the diverse nature of learning communities, including a variety of learning styles, attitudes, educational levels, life experiences, cultures, technology skill levels, and other learner variables such as proximity to the campus itself. Communicates multimodally with students. Assesses student learning before, during, and after instruction sessions. Creates a lesson plan for an instruction session. Constructs effective learning objectives and activities tied to learning outcomes. Constructs effective classroom questions. Collaborates with faculty and colleagues to team teach. Uses appropriate technology to accomplish teaching tasks. These may include PowerPoint, Word, instruction classroom technology, Internet resources, Blackboard, or other tools as appropriate for the session. Scales presentation to time allotted and space constraints.</td>
</tr>
</tbody>
</table>
Reflects on assessments of student learning and own teaching performance and makes adjustments/improvements based on reflection, assessment, and other input.

Requests feedback from students, faculty, and colleagues.

Knows core resources of the subject and/or assignment in order to teach.

Tailors different types of instruction for different audiences: Course-related sessions; workshops (e.g., RefWorks, ArcGIS, etc.); special groups (visitors, EFL [English as a foreign language], high school, etc.).

Knows library services and collections, the library website, expertise of colleagues, and general research resources.

Knows how to search the library website and library databases.

Employs effective presentation and platform skills.

**Instruction competency 4:** Actively assesses and evaluates instruction efforts to improve teaching and increase the reach of the program.

**In practice**

“Maintains and regularly reports accurate statistics and other records reflecting own instruction activities” (ACRL [Association of College and Research Libraries], “Standards for Proficiencies” 6).

Reflects on assessments of student learning and own teaching performance and makes adjustments/improvements based on reflection, assessment, and other input.

Requests feedback from students, faculty, and colleagues, using various means such as classroom assessment techniques, surveys, and observations.

Conducts needs assessment.

Communicates instruction activities with the instruction coordinator to ensure alignment with the goals of the instruction program (ACRL, “Standards for Proficiencies” 5).

**Instruction competency 5:** Contributes to the promotion and development of the library research instruction program.

**In practice**

Offers constructive feedback to the instruction coordinator on program strategic initiatives.

Promotes instruction services to faculty and students.

“Establishes and maintains a working relationship with assigned academic departments and programs in order to incorporate library research instruction into the curriculum and other educational initiatives” (ACRL, “Standards for Proficiencies” 10).
Table 3. Reference core competencies

<table>
<thead>
<tr>
<th>Reference competency</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Reference competency 1:</strong> Demonstrates customer service skills.</td>
<td>In practice  Has a positive service attitude that conveys approachability and helpfulness to patrons. Establishes a rapport with patrons through open-ended questioning and active listening. Uses inquiry to understand the user’s information needs and verifies the specific question prior to searching. Searches efficiently in multiple sources as necessary, keeping the patron informed of the search’s progress and instructing the patron on research techniques as needed. Clearly communicates results and asks follow-up questions to ensure patron satisfaction.</td>
</tr>
<tr>
<td><strong>Reference competency 2:</strong> Conducts reference interviews to determine information needs.</td>
<td>In practice  Understands the role and function of the library in assignment completion and research. Individualizes assistance based on stage of the research process; level of course, project, student intellectual ability, and academic readiness; format appropriateness for learning task and research question; and learning style, abilities, and other cognitive preferences. Recognizes the need for different levels of peer review and scholarship.</td>
</tr>
<tr>
<td><strong>Reference competency 3:</strong> Provides reference assistance for basic and/or lower-level inquiries in all subjects, or in blended, multi-, and cross-disciplinary subject areas.</td>
<td>In practice  Knows how to find background information in appropriate library reference resources. Uses keyword and subject searches to find relevant materials. Identifies appropriate subject guides and is aware of core indexing and abstracting sources for all subject areas. Effectively searches consortia catalogs in addition to open-source reference aggregators such as Google, Google Scholar, and Wikipedia.</td>
</tr>
<tr>
<td><strong>Reference competency 4:</strong> Provides advanced reference assistance for assigned subject areas.</td>
<td>In practice  Stays up-to-date with trends and developments in specified subject areas. Understands research vocabulary and methodologies of assigned subjects. Knows specialized resource types (e.g., financial statements in business) as well as data sets and primary sources as appropriate.</td>
</tr>
</tbody>
</table>
**Reference competency 5:** Manages the reference queue.

**In practice**
Problems with professional, timely reference services through the following media: in person, on the phone, via personal and reference e-mail, through chat, and through LibAnswers.
Prioritizes reference queries at the reference desk and other venues.

**Reference competency 6:** Exhibits strong interpersonal and communication skills.

**In practice**
- Keeps colleagues apprised of necessary information about subject-area resources.
- Communicates with colleagues appropriately regarding shared research consultations, changing desk shifts, and reference collection maintenance (e.g., reviewing general collections such as quotation books).
- Builds rapport with colleagues and other library staff to provide quality, timely service to patrons, and collaborates with colleagues to provide expert reference services.
- Makes referrals to subject specialists, library departments, campus centers, and faculty.
- Responds to referrals in an appropriate and timely manner.
- Follows professional conventions of written and oral communication when working with patrons.

**Reference competency 7:** Develops and disseminates local knowledge to users.

**In practice**
- Navigates the library’s website to locate appropriate information about collections, services, spaces, and policies.
- Knows Georgetown-specific collections, such as the Booth Family Center for Special Collections, the Gelardin New Media Center, the Woodstock Theological Library, the Blommer Science Library, the Bioethics Research Library, the Dahlgren Memorial Library, government publications, etc., and makes referrals as appropriate.
- Gives clear, accurate directions to locations in the library and on campus.
- Knows about campus academic support services, including the Writing Center, Disability Support, and Student-Athlete Support.
- Develops knowledge of collections, services, and policies for the Washington Research Library Consortium and other District of Columbia-area libraries to make proper referrals.

**Reference competency 8:** Uses appropriate technology to accomplish reference tasks.

**In practice**
- Develops proficiencies in online and social media technologies that support reference services, including e-mail and chat.
- Understands reference technologies that support librarian and user research activities, including e-book platforms, the overhead scanner, printers, and microform machines.
- Knows the basics of citation management tools and office productivity software.
- Knows how and when to seek technological help with appropriate departments, including Library Information Technology, Cataloging, Acquisitions, and Access Services.

*The Dahlgren Memorial Library is the graduate health and life sciences research library at Georgetown.*
Table 4.
Collection management core competencies

| Collection management competency 1: Builds cohesive, appropriate research collections. |
| In practice |
| Considers the unique resource needs of Georgetown’s faculty and students to support research, teaching, and scholarly inquiry. |
| Builds level-appropriate collections to support Georgetown’s academic programs. |
| Works with Washington Research Library Consortium libraries to develop a shared collection as appropriate. |
| Considers collection strengths of Washington Research Library Consortium libraries when developing local collections. |
| Interacts with relevant subject librarians outside of Georgetown. |

| Collection management competency 2: Understands user needs and environments in assigned disciplines. |
| In practice |
| Works closely with faculty members and students to learn the structure, size, and scope of assigned programs as well as associated values, interests, research tools, and methodologies. |
| Writes impact statements for new programs as needed. |
| Develops subject-specific collection development policies and promotes collection use. |

| Collection management competency 3: Understands relevant academic literature of assigned areas. |
| In practice |
| Knows standard reference sources, bibliographies, handbooks, databases, and other tools for identifying core collections and understanding a discipline’s parameters. |
| Understands discipline-specific tools for developing advanced collections. |

| Collection management competency 4: Develops and manages collections with consideration of annual fiscal appropriations, ethical and legal considerations, and library policies. |
| In practice |
| Maintains awareness of fund balances for assigned accounts using appropriate tools. |
| Learns licensing terms and general copyright practices. |
| Follows established collection development and purchasing policies (e.g., e-resources and e-books). |
| Understands the workflow of other library departments, such as Acquisitions, Cataloging, Gifts, and Access Services. |
Collection management competency 5: Develops proficiency in collection development tools in all formats.

In practice
- Understands how the approval plan is constructed and how it can be changed.
- Understands GOBI’s features for searching, selecting, and sharing bibliographic records.*
- Learns other acquisition platforms as appropriate for subject area (e.g., HARRASSOWITZ, Casalini, etc.).†
- Uses firm order request form as appropriate.
- Identifies subject-specific publishers, vendors, and review sources.

Collection management competency 6: Understands workflows for adding items to the collection.

In practice
- Develops knowledge of workflows for acquiring new databases, journals, monographs, data sets, audio materials, films, and rare and archival materials.
- Selects and orders materials efficiently and in a timely manner and works with appropriate colleagues to develop interdisciplinary collections.
- Understands workflows for how materials are ordered, received, cataloged, and tracked.
- Knows procedures for handling patron-requested items.
- Understands processes for accessioning gifts, government documents, and open source materials.

Collection management competency 7: Maintains reference collection in assigned subjects.

In practice
- Selects appropriate print and electronic reference materials.
- Monitors the print collection for currency, space, physical condition, and electronic availability.
- Monitors internal usage statistics for print materials and reference database usage statistics as available.
- Promotes subject-area reference resources as appropriate through subject guides, instruction, and reference and research consultations.

Collection management competency 8: Creates and uses assessment data to support collection development, preservation, and retention decisions.

In practice
- Uses effective tools (Alma‡ and WorldCat§) to determine our collections’ strength and depth.
- Monitors collection usage data using appropriate tools (e.g., ILS [integrated library system] reports, interlibrary loan data, and vendor-provided usage statistics.
- Uses appropriate software to process and present data.
- Develops knowledge of the library’s disaster plan and coordinates with the preservation librarian as appropriate.

* GOBI is EBSCO’s Web-based acquisitions tool for finding, ordering, and managing e-books and print books.
† HARRASSOWITZ and Casalini Libri are library service providers based in Germany and in Italy, respectively, that supply bibliographical services, books, and journals to libraries worldwide.
‡ Ex Libris Alma is a cloud-based library services platform for managing the acquisition, sharing, cataloging, and use of digital and print resources.
§ WorldCat is a catalog maintained by member libraries of the Online Computer Library Center (OCLC) that lists the holdings of tens of thousands of libraries worldwide.
Professional Development Core Competencies

Each collections, research, and instruction librarian position description has a professional development accountability. Professional development pertains to the augmentation and enhancement of professional skills in areas of responsibility. Professional development can and should occur within the library, the university, the community, and applicable professional organizations.

Table 5.
Professional development core competencies

<table>
<thead>
<tr>
<th>Professional development competency 1: Serves and contributes to the work of the library, the university, and the profession.</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>In practice</strong></td>
</tr>
<tr>
<td>Participates meaningfully in appropriate local and external meetings, groups, and organizations.</td>
</tr>
<tr>
<td>Volunteers and accepts assignments to serve on search committees, special interest task forces, short- and long-term working groups like Leadership Council or the Communications Committee, and university committees, task forces, working groups, and governance bodies such as the Faculty Senate.</td>
</tr>
<tr>
<td>Contributes service to the profession by working with local and national library groups.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Professional development competency 2: Actively seeks new knowledge and updates skills to enhance performance in all areas of responsibility.</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>In practice</strong></td>
</tr>
<tr>
<td>Acquires new knowledge and updates professional skills by reading specialized literature, attending professional webinars and conferences, and consciously cultivating improved proficiencies.</td>
</tr>
<tr>
<td>Participates in relevant professional organizations at a local and national level to enhance expertise in liaison areas and as an information professional.</td>
</tr>
<tr>
<td>Shares knowledge with colleagues as appropriate to augment skills of others in department.</td>
</tr>
<tr>
<td>Contributes to the library community through writing, mentoring, teaching, and holding elected office at all levels.</td>
</tr>
</tbody>
</table>
Appendix B

A Selection of Professional Standards, Guidelines, and Competencies


Appendix C

Bibliography


Crafting Competencies, Creating Culture: Using Core Competencies to Navigate Departmental Mergers


Notes

1. The 2018 name change was the final step of the 2014 merger between the Collection Development Department and the Research and Instruction Department. The new name, Research Services, highlights that the department has taken on a new, holistic identity apart from the combined pieces of a past organizational structure.


