



Final Report and Recommendation of the ARL PD Bank Working Group

In March of 2013, the Association of Research Libraries Position Description Bank (ARL PD Bank) Working Group was established and charged to:

- Assess the ARL PD Bank's ability to deliver on established goals
- Make recommendations regarding the sustainability of the ARL PD Bank and the necessary policies and procedures to achieve this
- Develop criteria for inclusion of non-ARL participants
- Prepare a report/recommendations for the October 2013 Board meeting

The membership of the group includes four personnel administrators from ARL member institutions who are actively participating in the ARL PD Bank (Tiffany Allen, University of North Carolina [UNC]; Kathleen DeLong, Alberta; Quinn Galbraith, Brigham Young University [BYU]; and Nancy Wonsey, University of Massachusetts [UMass]), Judy Ruttenberg and Mark A. Puente from ARL, and Judy Russell and Brian Keith from the University of Florida (UF).

Please accept the following as our final report and recommendation.

ARL PD Bank: Overview

In March 2012, the ARL Board of Directors authorized the establishment of the ARL PD Bank to serve as an ongoing collection of position descriptions (PDs) from major academic and research libraries with the following goals:

- The ARL PD Bank is to foster the sharing of information through a browsable and searchable database that provides access to a collection (or bank) of PDs.
- Additionally, the ARL PD Bank is to offer support for the management of PDs for individual institutions, providing an effective organizational method and system that supports findability as well as archiving for long-term digital preservation.
- The ARL PD Bank is to provide a useful source for current PDs and will depict the evolution of positions and library functions and services as reflected over time in the PDs.

The system was developed by a UF team with broad input from other institutions, including over 20 ARL member institutions, via surveys, focus groups, and beta testing. The system was launched in February 2013, and the UF team has continuously supported the onboarding of



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peer institutions since that time. ARL contributed to the programming cost to develop the system through the ARL Agility Fund.

The ARL PD Bank is a collection of position descriptions (PDs) and related documents, such as position vacancy announcements, which describe the work of library employees. The PD Bank fosters the sharing of information through a browsable and searchable digital archive. The PD Bank provides a source for current PDs and also tracks the evolution of positions and library functions and services and the varied ways in which institutions organize and define functions.

The PD Bank, as a collective work of academic and research libraries, can inform us about our industry and benefit libraries. Beyond that, however, the system supports the management of PDs for individual institutions, providing an effective organizational method and system that supports findability as well as archiving for long-term digital preservation. The PD Bank provides participating institutions with a functional digital archive of their own position descriptions. In addition to standard data fields available to all participants, individual libraries may elect to use custom data fields that would not be viewable by other institutions, such as employee and supervisor names, classification, date last reviewed/modified, and other data identified by the institution as useful for internal purposes.

The PD Bank is a web application with a simple, intuitive interface. The free, secure system features highly effective keyword searchability of documents for positions (PDs and/or vacancy announcements and/or activity/assignment) uploaded and updated by institutions and relies on metadata submitted and maintained by the institution. Enhanced functionality includes the ability to upload other institution-level files, archiving and access to previous versions of documents for a position, and a document forwarding option to support the distribution of PD's. Additionally, the system permits communications across institutions regarding positions, connecting the community of users.

To date, there has been considerable outreach to ARL members, and the UF project team has supported onboarding of ARL members with numerous live demonstration and Q&A sessions and ongoing customer service via email and telephone. For a timeline of outreach activities, please refer to the supplemental information. [APPENDIX 1]

In addition, the team has developed extensive help documentation and orientation videos (see: <http://www.uflib.ufl.edu/arlpd/Bank/help.html>). These, and other content for use by participating institutions, have been archived in the UF Institutional Repository and through August 2013 had been accessed 1,910 times.

To optimally support user orientation, the UF team established two sites: Practice and Live. As part of the onboarding process, new participant institutions initially have access to the fully



functioning Practice site where they are encouraged to test drive the system features by entering a limited but representative data and documents. Upon their request, the institutions progress to the Live site. The orientation stages are as follows:

1. The institutional lead (director determined) registers in the system.
2. Representatives receive orientation to the system, currently via a live online demonstration session.
3. The institution is activated in the Practice site and institution users test-drive the system.
4. Upon request, the institution is activated in the Live site.

As of September 24, 2013, there were 174 registered users from 84 ARL member institutions. 24 institutions were active in the PD Bank Live site, and the others are in various stages of implementation. At that point, 1,049 position records had been submitted: 410 Professional Librarians, 70 Other Professionals, and 569 Support or Paraprofessionals. For additional statistics on the position records, including a list of the functional areas currently represented in the PD Bank, please refer to the supplemental information. [APPENDIX 2]

From February 1 to September 24, 2013, the ARL PD Bank system was accessed 38,134 times, and users had conducted 4,399 searches.

ARL PD Bank: Assessment

In an effort to assess the PD Bank's effectiveness delivering established goals, the ARL PD Bank Working Group conducted a brief survey of users in the Live site. During a two-week period in August of 2013, 17 users responded to the online survey for a 38% response rate.

Overwhelmingly, the responses were positive, and several functions of the system were rated highly for ease of use. The ability to store position descriptions from the home institution, as well as look at position descriptions from other institutions, compare across organizations, and borrow language from descriptions were all described as being highly valuable functions of the PD Bank. A summary of the survey results can be found in the supplemental information [APPENDIX 3].

Further, there have been queries from researchers seeking access to the system. For example, one active researcher from the ARL community is interested in the system. In addition, a Library School dean that conducts an annual "job skills audit" to inform her students of the skills needed in the current marketplace has expressed enthusiastic interest.



ARL PD Bank: Recommendations

The PD Bank Working Group was also charged to recommend and create systems, procedures, and documentation to support the sustainability and use of the PD Bank. The recommendations are as follows:

- Create an ARL PD Bank Advisory Group. As a sub-committee of Transforming Research Libraries, the ARL PD Bank Advisory Group will: develop, implement, and oversee execution of policies, procedures, system modifications, and improvements related to the ARL PD Bank; promote the use of the PD Bank as a tool to further the understanding of how work is evolving and defined in academic and research libraries; and assess and report the extent to which the PD Bank supports the human resources management activities at participant institutions. For a complete charge and membership proposal, please refer to the supplemental information. [See APPENDIX 4]
- Expand participation to include Non-ARL Libraries. The value of the ARL PD Bank as an industry-wide resource lies in its content. Expanding the access to the system beyond ARL members will maximize this value, and the system has been designed with this in mind. For a thorough discussion of the proposed model for expanding participation see the *Expanding to Non-ARL Libraries – Leveraging Our Web of Collaborative Relationships* section of this report.
- Establish a User Conduct Policy. [See APPENDIX 5] The adoption of the Policy would communicate the responsibilities of system users from ARL institutions and the permissible uses of the system. Non-ARL member institutions would be required to agree to the Policy before obtaining access to the system and the Library Dean or Director would sign a copy.

ARL PD Bank: Expanding to Non-ARL Libraries – Leveraging Our Web of Collaborative Relationships

Model

ARL will offer the PD Bank to academic library consortia in which there is an ARL library willing to take responsibility for the non-ARL consortia members' onboarding and training in use of the system. This model is not fee-based but rather community- and service-based. Contributions to the value of the PD Bank from non-ARL members will be in the form of data and the opportunity to capture the ways in which these institutions organize and define work. Onboarding costs will be borne as professional service based on existing collaborative relationships within consortia. This model is an opportunity to add libraries, build community,



add content, and build on existing relationships without adding to the bureaucracy and overhead of either ARL or UF.

Assumptions

- More position descriptions in the PD Bank make the tool more valuable for everyday use and research.
- There are institutions outside of ARL that would benefit from the tool and would contribute data beneficial to the ARL participants.
- The PD Bank can reside at the University of Florida, which will assume maintenance and storage costs, for the next 3–5 years. Maintenance includes necessary repairs to the system to maintain current functionality.
- In 3–5 years, ARL will either move the system into the ARL technology environment or renegotiate with UF (or another institution) to house it.
- The PD Bank system development is “done” in the sense that it meets its objectives and is easy to use: there are no major required upgrades that the Working Group currently foresees.
- This model will require UF to program a “consortia administrator” function and to add the search function within the system to search by consortia.
- Recommendations from the user community for major enhancements that would improve the tool and benefit the ARL membership will be vetted by the ARL PD Bank Advisory Group and submitted to ARL for potential funding. ARL could choose to contract that development to the UF team.
- The PD Bank does not need a large standing fund for maintenance.
- Given the low anticipated need for maintenance funds, the Working Group considers that the burdens of overhead (invoicing, e.g.) exceed the potential benefit of operating the PD Bank as a fee-based service at either UF or ARL at this time.
- The UF team, which has actively onboarded ARL members since February 1, 2013 when the system went live, has reduced its intense efforts at live training and support for data uploading and normalization. The UF team has produced instructional web videos on all key elements of the system and will continue to offer consultations to their ARL human resources colleagues in order to support their use of the system.
- Many ongoing customer service questions may be resolved user-to-user via the PD Bank Google group, maintained by ARL.
- Non-ARL members under this model would agree to adhere to the User Conduct Policy that states that users of the system should be providing their content and keeping it up to date.

To support this model for expanding the access to the system, the following members of ARL PD Bank Working Group have volunteered to serve as Consortia Administrators:

- ASERL: Brian Keith (UF) and Tiffany Allen (UNC)
- GWLA: Quinn Galbraith (BYU)



- TRLN: Tiffany Allen (UNC)
- Five Colleges Consortium: Nancy Wonsey (UMass)
- CARL: Kathleen DeLong (Alberta)

ASERL has specifically requested access for its members and has been identified as a potential pilot consortium based on membership, which includes UF and UNC. The pilot will serve as an opportunity to develop and assess processes and documentation that can be used to support the work of onboarding future consortia.

The proposed timeline for the ASERL expansion is:

- Propose to ASERL at the November 19-21, 2013 Membership Meeting.
- Develop model documentation based on ASERL experience.
- Roll-out to additional consortia in 2014.

ARL PD Bank: Conclusion

Based on the goals set forth for the ARL PD Bank, it is the conclusion of the members of this Working Group that the PD Bank meets, and in many cases exceeds, expectations. Early in the discussions, the Working Group defined success as having “good data” in the system, that is, data that is found to be stable, reliable, accurate, and maintained over time, with a useful representation of all functional areas. The system allows for member-contributed data to be easily submitted, maintained, and shared. The barriers to entry are very low and the system design is intuitive. Help documentation and assistance is easily available, and with the establishment of a user community (as recommended in the expansion proposal), communication among members will be facilitated and encouraged. It is the finding of this group that the PD Bank is a highly useful, timely, relevant, and important tool for use by library personnel officers, library administrators, and researchers.

For the future, the adoption of the system by ARL member institutions has been encouraging, but the system will only deliver upon its potential, and in fact remain useful as an industry level resource, if institutions continue to provide and update content.



APPENDIX 1: Timeline of Outreach Activities

October 2011

- Dean Russell shared proposal to establish an ARL 'job bank' via the ARL Directors Discussion List.

January 2012

- Executive Director Lowry queried ARL Directors to gauge level of interest via the ARL Directors Discussion List
- Message was forwarded to ACRL Personnel Administrators and Staff Development Officers Discussion Group List

May 2012

- UF Project Team led four presentations for Personnel Officers to discuss elements to be included and desired functionality

June 2012

- UF Project Team presented design concept to ARL

October - November 2012

- UF Project Team led 2 Demonstrations for ARL Institutions
- UF Project Team led 2 Beta Testing Demonstrations for Initial Beta Testers

December 2012

- ARL communication regarding Demonstration at ALA Midwinter:
 - ARL-Directors
 - ARL-Announce, ARL Weekly Update, ARL website, ARL social media accounts
 - ARL Salary Survey coordinators
 - 2012 ACRL/ARL HR symposium attendees
 - ARL StatSalary list
- Message was forwarded to:
 - ACRL Personnel Administrators and Staff Development Officers Discussion Group
 - Organizational Development listserv
 - LLAMA LOMS Org Development Discussion Group listserv

January 2013

- UF Project Team led ALA Midwinter Demonstration
- Trifold developed and distributed at ALA Midwinter
- UF Project Team led Beta Testing Demonstration



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February 2013

- ARL announces launch to:
 - ARL-Announce
 - Attendees of the ACRL/ARL HR Symposium
 - ARL-Directors
- Message forwarded to:
 - LLAMA LOMS Org Development Discussion Group listserv
 - ACRL Personnel Admin Discussion Group
- UF Project Team led 3 Demonstration and Q&A Sessions

March 2013

- UF Project Team led 4 Demonstration and Q&A Sessions

April 2013

- UF Project Team led 3 Demonstration and Q&A Sessions

May 2013

- Tiffany Allen presented ARL PD Bank at ARL Membership Meeting
- UF Project Team led 4 Demonstration and Q&A Sessions

June 2013

- Tiffany Allen and Judy Ruttenberg presented on ARL PD Bank at ALA Annual Conference to ACRL Personnel Administrators and Staff Development Officers Discussion Group

July 2013

- UF Project Team led 1 Demonstration and Q&A Session

August 2013

- Dean Russell sent Reminder of ARL PD Bank to ARL Directors Discussion List
 - Forwarded to ACRL Personnel Administrators and Staff Development Officers Discussion Group
- UF Project Team led 2 Demonstration and Q&A Sessions

September 2013

- UF Project Team led 2 Demonstration and Q&A Sessions



APPENDIX 2: Position Record Statistics

Position status: 992 Filled, 45 Open, and 12 Discontinued

Appointment type: 763 Regular, 252 Tenure Accruing or Permanent Status Eligible, 34 Temporary / Time Limited, and 0 Residency / Fellowship / Internship

Library type: 963 All Other, University; 41 Medical Library, University; 45 Law Library, University; and 0 Non-University Library

The following 37 functional areas are currently represented in the ARL Position Description Data Bank:

- Access Services
- Acquisitions
- Archiving/Curatorial/Rare Books
- Assessment
- Cataloging/Bibliographic Control/Metadata
- Circulation
- Clerical/ Administrative Support
- Collection Development/Management
- Communications/Public Information
- Data Curation
- Development/Fundraising
- Digital Services
- Distance Learning
- Document Delivery
- Electronic Resources
- Exhibits
- Facilities/Security
- Finance/Budget/Accounting
- GIS Systems/Data
- Government Documents
- Grants Management
- Human Resources/Organizational Development
- Information Technology/Systems
- Instruction
- Integrated Library System
- InterLibrary Loan
- Liaison
- Media/Multi-Media Specialist
- Off-Site Storage
- Outreach Services
- Preservation/Conservation
- Press/Publishing
- Reference/Research
- Scholarly Communication/Copyright
- Shared Collections
- Staff Development/Training
- Subject Specialist



APPENDIX 3: Summary of the survey of PD Bank users

How often do you typically access the ARL PD Bank?

A majority of users (88.3%) indicated that they access the PD Bank either monthly or less than once a month.

How are you using the ARL PD Bank?

Most users (64.7%) indicated that they use the bank to add job descriptions or look for job descriptions. A smaller number (29.4%) indicated that they use the PD Bank to manage position information and/or documentation (such as vacancy announcements). One respondent (5.9%) indicated use of the bank for a research project. The project involves researching and writing an article on librarian positions with copyright duties.

Ease of Use

The PD Bank functionality was found to be straightforward and easy to use. Survey respondents indicated that the following functions have a high degree of ease of use:

	Yes	No	Don't Know or N/A
Navigation within the system	92.9%	0.0%	7.1%
Basic searching	85.7%	0.0%	14.3%
Adding a new position	78.6%	0.0%	21.4%
Advanced searching	71.4%	0.0%	28.6%
Uploading documents for a position	71.4%	0.0%	28.6%

Survey takers were asked what they found most valuable about the ARL PD Bank. Some of the comments follow.

- The ability to look at job descriptions from other institutions
- Offers the ability to access and compare different descriptions of positions, particularly in emerging areas of practice
- Having a searchable database of positions when my institution is getting ready to create a new job or fill an existing position
- Access to other job descriptions in order to borrow phrases
- Positions descriptions are often difficult documents to get at in my institutions as well as across institutions. The ARL PD Bank is a valuable resource for locating documents that would otherwise require a great deal of time and effort to locate



Users were asked if there was anything you wish the PD Bank could do that it doesn't currently do.

Few comments were received. One of the comments was:

I wish there was a way to indicate when we have multiple individuals with the same position description, perhaps being able to insert a number greater than 1 in the FTE field. In an effort to simplify the results for others, we are not creating multiple PD records if multiple individuals have the same position description. We can do this since we are not using the system to track employee data. Being able to see how many of x position our peer institutions have would be useful.

Survey users were also asked to provide additional feedback. Here are some of the suggestions:

- I wish the PD Bank was open to non-ARLs, at least for posting positions. I think it would increase the size and diversity of the entries and make it more valuable for the primary reasons I intend to use it.
- If there were places that wanted to use it for position management, ARL could make that a fee-based service. I think you should also market it for research purposes.
- Great idea to have such a bank. Good job on the part of everyone involved.



APPENDIX 4: ARL Position Description Bank Advisory Group

As a sub-committee of Transforming Research Libraries, the ARL PD Bank Advisory Group will:

- Develop, implement and oversee execution of policies, procedures, system modifications, and improvements related to the ARL Position Description Bank (PD Bank).
- Promote the use of the PD Bank as a tool to further the understanding of how work is evolving and defined in academic and research libraries.
- Assess and report the extent to which the PD Bank supports the human resources management activities at participant institutions.
- Assess and report the extent to which the PD Bank is a decision-making tool for participant institutions.
- Review and consider membership requests from non-ARL institutions, and make recommendations for inclusion based on identified and articulated criteria.

Membership

- Membership should include ARL program staff, University of Florida staff, and PD Bank users.
- Staggered two-year terms, beginning July 1.
- Group will meet virtually and/or at ALA conference to occur quarterly or more frequently as necessary. Other communication as useful by email.



APPENDIX 5: User Conduct Policy

Users of the ARL PD Bank are cooperating to maintain a positive experience for themselves and others. Users are responsible for all content that they post or disseminate and are expected to maintain behavior that consistently respects the rights of other users to access job descriptions, conduct scholarly research, and add quality content to the Bank. Users are expected to abide by the policies and procedures adopted for the use of the Bank. The Advisory Group of the ARL PD Bank reserves the sole judgment to determine what behavior or practices constitute inappropriate use of the Bank. If inappropriate use persists, the Advisory Group reserves the right to issue a warning, suspend activity, or to restrict access to the Bank.

The PD Bank, as a collective work of academic and research libraries, can inform us about our industry and benefit libraries. It is an ongoing resource – not simply a one-time effort to collect documents. Submission of positions requires providing limited Standard Data to complement keyword search capabilities. The value and utility of the system and the ROI to ARL members is directly linked to the maintenance of the data and documents by users. Accordingly, use of the system brings with it the responsibility by institutions to submit a comprehensive set of positions for their institutions and to keep their data and documents up to date.

Note:

- Position descriptions and associated information should not include social security numbers, driver's license numbers, alien registration numbers, passport numbers, or birthdates; or bank account, credit or debit card information or the like; or personal contact information like home addresses.
- The decision about whether to include employee names on position descriptions should be made by each institution.