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Chapter 8: Creating Analyst Positions in an Academic Library: The UC-San Diego Example

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Academic libraries are facing increasing pressure to illustrate their value to stakeholders and to justify expenditures, both qualitatively and quantitatively. In response, many have moved toward seeking greater user feedback and performing more holistic and systematic assessments. The use of statistics, data, and other concrete information to inform decisions about staffing, services, resources, facilities, and more is increasing, as evidenced in part by the growing popularity of the biennial Library Assessment Conference.¹ ALA conference sessions such as Using Today’s Numbers to Plan Tomorrow’s Services: Effective User Services Assessment and Maybe It Has Already Been Done: Locating Existing Data for Planning, Assessment, and Advocacy are also increasing, providing information on data-driven and evidence-based decision-making using a wide range of assessment methodologies and applications.²

The University of California, San Diego (UCSD) enrolls roughly 23,000 undergraduate and 4,000 graduate students and is particularly noted for its engineering, science, math, and biology programs.³ The UCSD Libraries, composed of six separate libraries housed within three buildings both on and off campus, support the university’s faculty, students, and medical staff.

In the fall of 2007, the Libraries’ Associate University Librarian for User Services (AUL/User Services) established a new Decision Support Analyst position which would report directly to her. Prior to 2007, while some statistics related to library operations and resources were readily available and reported regularly, others were not. Much of the Libraries’ data was disorganized or incomplete, or scattered in multiple locations, formats, or technologies. The Libraries’ statistics gathering efforts were complicated by a lack of consistency for recording
data across library locations, leaving administrators to make difficult decisions with often limited, incomplete, or potentially biased information.

A complementary User Services Technology Analyst position was created in 2009. Today the Decision Support and User Services Technology Analyst positions now provide decision support and technology planning and implementation services for the UCSD Libraries. They also facilitate more systematic and sustained assessment and analysis efforts within the Libraries’ user services areas and, in some instances, more broadly across the organization. This chapter highlights the evolution of the analyst position model at the UCSD Libraries, and outlines the responsibilities of the Decision Support and User Services Technology Analysts. It then provides examples of projects assigned to each analyst and considerations for other library organizations thinking of implementing an analyst model.

**Evolution of the Analyst Position Model: The UCSD Libraries’ Solution**

Despite the trend toward greater use of assessment results, data analysis, and evidence-based information in decision-making, many academic libraries continue to lack the staff to support these increasing demands. In 2007, UCSD Libraries’ administrators, recognizing the growing importance of assessment and the lack of a dedicated individual, department, or committee to perform many of these tasks, began to consider how assessment-related activities could be accomplished and sustained long-term. Rather than developing an assessment committee or centralized assessment office, as other academic libraries have chosen, administrators decided to establish analyst positions with specialized roles, including assessment. Additionally, because funding to support new positions was unavailable, existing employees were targeted to assume these new responsibilities.
The AUL/User Services established the Decision Support Analyst position first, moving the Assistant Director for Access Services in the Social Sciences & Humanities Library into the role half-time in the fall of 2007. Primary responsibilities for the new position included planning and conducting assessments and performing a variety of other studies and analyses to facilitate effective, data-driven decision-making. While the librarian moving into this position had skills related to project management and analysis which qualified her for the work, she had to learn new skills related to usability and other assessment methodologies. After a one year pilot, the value of the Decision Support Analyst’s work was assessed, and a decision was made to not only continue, but to increase the position to full-time status. This was accomplished by the summer of 2009.

When the Decision Support Analyst position was established, the AUL/User Services noted that her intention was to provide herself and the Libraries’ administrative team with the support needed to make well-informed, data-driven decisions. She further elaborated that nearly any service or project could be assigned to the Decision Support Analyst for analysis. While the exact details of the Decision Support Analyst role evolved over time, the individual in the position was charged to lead various user services-related projects assigned to her by library administration, manage the timelines and progress of these projects, and monitor selected statistics impacting user services to track the performance of the library’s established public services. The Decision Support Analyst currently researches and summarizes assigned issues and topics, conducts comparisons among University of California and/or ARL Libraries, and evaluates the Libraries against national, regional, and local benchmarks. She conducts various types of usability and usage studies and collects data for statistical and budgetary analyses. The Decision Support Analyst is responsible for conducting internal and external research,
documenting findings, and establishing facts. She must be able to draw valid conclusions and make appropriate recommendations. The Analyst generates reports as requested and provides the Libraries’ administration with data, analysis, and materials for presentations and reports. The Analyst is responsible for providing supplemental information that enhances the administrator’s ability to make appropriate decisions. She must facilitate positive working relationships with library staff and external contacts, collaborating when needed.

Success with the Decision Support Analyst position, partnered with the realization that additional user services-related technology projects and assessments needed to be pursued, led to the creation of the User Services Technology Analyst position. This role, initially set at quarter time, was assigned to the Social Sciences & Humanities Library’s Electronic Information Services Coordinator. As projects and duties for this position grew, the incumbent’s former responsibilities were reassigned to others and the position was increased to full-time status by late 2009.

The User Services Technology Analyst position, while created to work within the UCSD Libraries’ specific environment, is a hybrid of positions found both in academia and the private sector. Libraries heavily rely on their information technology operations to support research and instructional services, as well as public and staff computing. The Libraries’ user services staff, through their training, daily interaction with users, and expert knowledge of library trends, are often best equipped to predict changes in existing services which may require technology or IT support. IT staff in turn must make projects proposed or initiated by user services staff a reality. Strained communication and relations between IT staff and librarians, however, is not uncommon. In 2010, at least two webcasts, Strengthening the IT/Library Staff Partnership and Strategic Planning for Library-IT Collaboration, addressed this issue. In academic libraries, a
process for guiding new user services/IT projects from conception to completion is often absent. Usually libraries have a positive ‘problem’ in that more forward-thinking technology project ideas are generated than can be implemented. Having numerous competing ideas without a process to prioritize projects in regard to feasibility, scope, or available resources or a process to identify and structure project requirements, however, can derail new initiatives. The lack of a formal project manager can also jeopardize a project’s success.

The User Services Technology Analyst facilitates a collaborative working relationship between user services staff and IT, working to implement a structured process for clearly identifying project requirements, or the features and functions which should be built into a new technology service or product. The analyst serves as a ‘translator’ between what user services staff desire and what is technically possible. In this role, the Analyst ensures that a project does not become unmanageable.

The User Services Technology Analyst must have a user-oriented background and possess first-hand knowledge of and experience working with technology. An ability to communicate effectively with both IT professionals and librarians and administrators in user services is essential, along with an understanding of the perspectives of each group. This position is responsible for providing administration with various types of technology analyses, needs assessments, and usability study reviews. In addition, the User Services Technology Analyst serves as a technology liaison or consultant to various library committees and groups, to communicate new technology services and changes across the organization. The Analyst is also expected to work closely with the Libraries’ IT units to manage and implement changes to library public computing.
The Decision Support Analyst initially worked alone, interfacing with various groups and individuals as projects required, and meeting individually with the AUL/User Services to receive direction and report on project progress. Once the User Services Technology Analyst assumed his role full-time, the Analysts became a collaborative team, working together on library-wide projects and meeting regularly with the AUL/User Services to report on progress, receive and prioritize project assignments, and surface ideas and concerns for consideration or discussion.

Both Analysts serve on various library committees and task groups and take action as appropriate to expand awareness of library developments at UCSD and elsewhere. They also communicate their findings, research, or other information through the sharing of textual, visual, or statistical reports and through presentations to various management and library-wide groups, as requested or appropriate.

**Typical Project Life Cycle**

Projects assigned to the analysts that involve new or significantly modified services, technologies, resources, and practices often require a variety of actions. A project may typically begin with an analyst conducting a literature review or environmental scan to better understand existing options or practices. Feedback to library administration is then provided, so administrators may consider the value, scope, cost, and impact of the ideas, and approve those that warrant advancement at that time. For approved projects, the analysts develop a project plan for the AUL/User Services that outlines technical specifications, costs, a timeline, the anticipated workload, potential challenges or barriers, other details and considerations, and a recommendation from among several options. The Analysts may need to evaluate a technical or technological aspect of the project and coordinate with library or campus information technology
units. Analysts may also need to consult with numerous individuals and groups across user services areas for projects that are likely to impact staff or users.

During the implementation process feedback must be gathered and progress communicated. The Analysts or others, such as a user services committee related to the project, may offer staff and/or user training and education. In some cases, marketing activities are required to alert users to the availability of a new service, tool, feature, resource, or facility. Following implementation, the analysts may compose a final report documenting the project, including challenges faced, benefits anticipated, and lessons learned. The analysts or others may perform subsequent monitoring to ensure that the project’s goals were met and the implementation was successful. In some cases, assessments are subsequently conducted on an annual or otherwise iterative basis for continual project oversight and improvement.

Selected Projects of the Decision Support and User Services Technology Analysts

In recent years, changes and initiatives that have influenced the Analysts’ work have included the Libraries’ move toward greater self-service, the consolidation of selected service points and operational units, the creation of new study and computing spaces, collection reviews, and strategic planning. Additionally, the State of California’s strained financial situation has significantly impacted the Analysts’ roles and projects. Issues and investigations to help the Libraries accommodate the University of California’s budget cuts dominated much of 2009, leaving limited time for researching or implementing new projects. Further budget issues arose in 2010 and 2011, and are likely to continue into the near future.

One of the Decision Support Analyst’s first tasks was to coordinate and implement the Libraries’ initial foray into usability testing. This was viewed as critical for successfully
redesigning and maintaining the Libraries’ website. Results provided invaluable user insight which directly influenced the site’s development. The Analyst has since conducted a variety of usability tests on different parts of the Libraries’ website, examining components such as tab and heading names, terminology, formatting, functionality, and more. Each project has informed the continual modification and enhancement of the Libraries’ online presence. The analyst has also developed a long-term usability plan for the Libraries which documents the importance of conducting usability studies regularly and outlines a strategy for accomplishing this. This plan has further helped to solidify the Libraries’ commitment to its strategic planning initiatives by providing a framework for systematic and consistent usability testing.

As the Decision Support Analyst has become recognized throughout the Libraries as its usability and assessment expert, she has provided assistance and guidance to staff and committees assigned to evaluate the services for which they’re responsible. Working with an individual or group to develop an assessment or evaluation plan, the Analyst poses questions to elicit and understand the precise goals for the assessment. The Analyst also assists individuals or groups with selecting an appropriate methodology, conducting the assessment or usability testing, and presenting the results. Recent projects have included usability testing of an introductory online tutorial for the Libraries, usability testing involving the Libraries’ interface for its locally produced digital collections, and an assessment of the content of chat, text, and e-mail reference questions.

The Decision Support Analyst is heavily involved in analysis of data for the Libraries’ space reconfiguration efforts, calculating seating capacities and fill rates for various spaces throughout the Libraries’ buildings to better understand where different amounts or types of seating might be needed. The analyst gathers and arranges existing raw data, organizes it, and
presents it via the detailed annual seating inventory. This useful document directly contributes to administrators’ thinking and planning regarding the use of space within library buildings, clarifying the types of library seating offered in each space and how the number and types of seating have changed over time. A photographic and observation study of new collaborative study spaces is in progress for the spring of 2012 to understand how patrons adopt and use this space so that enhancements can be made to better serve user needs.

Other examples of projects the Decision Support Analyst has worked on to date include meeting informally with users, revising library and campus publications, compiling annual library statistics, inventorying existing statistics kept within the library in preparation of implementing the LibPAS statistical repository, reviewing proposals, participating in needs assessments, facilitating focus groups, conducting literature reviews and environmental scans, completing ARL SPEC surveys, conducting surveys with library users or library staff, analyzing use of various electronic products to which the Libraries subscribe, conducting wayfinding studies, revising and maintaining library signage, and reviewing and unifying the 4,000+ free-text notes in the online catalog. The analyst has conducted reviews of existing best practices policies, and fees at other University of California and/or ARL libraries on such things as assessment activities, ILL charges and policies, reserves operations, digital information literacy initiatives, and organizational structure. She has also used gate counts, cost analyses, and other data to inform budget reduction strategies involving the use of service desks, library hours and staffing, and the consolidation of interlibrary loan units. The AUL/User Services has used the Decision Support Analyst’s environmental scan of academic libraries’ experiences with LibQUAL+® in discussions with the University Librarian about what types of assessment tools the Libraries might consider using. Further, the Analyst’s review of Friends of the Library
programs at other University of California campuses helped the AUL/User Services and the Libraries’ Director of Development consider additional services to provide to Friends members as a way to increase membership.

As lead for developing and co-managing projects involving library user services and IT, the User Services Technology Analyst headed a cross-functional group that investigated how user services could be delivered effectively via mobile devices. This required an assessment and prioritization of which core library services are best suited for mobile access, and an environmental scan of what similar institutions were already offering. The results informed the functional requirements for a mobile website. The Analyst then led a small team of librarians and IT staff which worked collaboratively to draft the mobile site content while also co-designing the user interface. This group is now charged with periodically reviewing and creating new mobile content and services.

Responsible for assessing existing library technology services and providing Libraries administration with concrete recommendations as to whether a service should be continued, modified, or discontinued, the User Services Technology Analyst also recently assessed the library’s online database recommendation service. Developed as an in-house project several years ago, this service was beginning to show its age, and anecdotal evidence indicated it had outlived its usefulness. A proper data-driven analysis, however, was required to determine which features of the service were no longer necessary and which needed to be migrated to a newer technology. Working with library IT staff, the Analyst collected extensive, multi-year usage data, which provided a clear indication that the vast majority of Librarian recommended databases and websites were no longer relevant or applicable for patrons. This served as a justification and guide for weeding these recommendation entries and creating a much smaller and more focused
collection of licensed content. The features the Libraries should migrate for the service were also identified and recreated in a new platform.

Other recent tasks completed by the User Services Technology Analyst include creating specifications for implementing an online self-booking system for study rooms, developing comparisons between enterprise-level consortial borrowing software, creating an inventory of library classrooms and librarian needs for these classrooms, and managing the Libraries’ transition to an updated public computing model. The User Services Technology Analyst has also worked with the Decision Support Analyst to perform a detailed gap analysis of the Libraries’ local online catalog, as the entire University of California system moves to primary reliance on a shared catalog.

**Benefits and Challenges of the Analyst Model**

The Libraries’ has realized a number of benefits by creating the Decision Support and User Services Technology Analyst positions. The most significant include the establishment of a flexible and readily available staffing resource to work on projects as they arise, the ability to tackle projects not necessarily appropriate for any one position, and the ability to finish projects the Libraries had previously wished to conduct, but lacked the resources to make a high priority. The benefits of having individuals dedicated to supplying insight and analysis and ensuring that administrators and others have solid and complete information for making sound decisions is also recognized. The AUL/User Services has noted the value of the data the analysts have provided and its role in the effectiveness and efficiency of management within her portfolio.

Analysts can also save administrator’s time, by freeing them from conducting needed research or investigations to support decision-making. The data and insight they provide for the
Libraries also creates opportunities for the Analysts to serve as a bridge between library administrators and staff and between the Libraries and its users. As the point persons to monitor technology applications or assessment activities, the analysts can help to initiate, track, and sustain service assessment over time or identify and investigate possible technological features, practices, policies, or applications that could be leveraged across the library organization. As designed, the Analyst positions take advantage of a staff member’s existing skill set, while also developing individuals specifically to suit the organization’s current and future needs. The possibility of sharing the Analysts’ knowledge and expertise with others by distributing their research and supporting documentation among consortial or other partners is an additional benefit. Selected work of the UCSD Libraries’ Analysts is shared with librarians at other University of California libraries.

The individuals in the Analyst positions have also realized a number of benefits. They primarily have the satisfaction of seeing their work provide a central justification for positive changes to services and infrastructure, as their roles allow for significant and direct contributions to the Libraries. The Analysts gain a broad perspective of how the Libraries function internally and how they serve to support the goals of the wider campus community. At the same time, the Analysts have the opportunity to engage in a variety of projects, employ analytical tools and share perspectives from fields outside the library. Analysts also learn valuable skills that can be transferred to other libraries or even other service industries.

**Considerations for Libraries Thinking of Implementing the Analyst Model**

Libraries considering implementing an Analyst model to address their assessment and decision-support needs should consider several questions. Logistical issues related to recruitment
or reassignment include whether the library can hire an additional person to fill the newly created role, or if it can develop an existing staff member with the right set of skills and attributes. If an internal candidate is identified, will this individual’s salary be renegotiated after moving into the new role, or will the change be considered a financially lateral move? Will a designated internal candidate immediately assume an analyst role full-time, or gradually assume these responsibilities? The Analyst role has strikingly different responsibilities from other library roles. Thus, a transition to this position may be particularly challenging and require flexibility from all involved. Further, will the Analyst lose any responsibilities, such as supervising others, that may adversely affect his or her professional growth or future employment opportunities? To ensure that proper administrative and technical support is provided, where should the Analyst’s physical office location be? While proximity to administration or one’s supervisor may be convenient, it is unlikely essential.

Reporting lines are another important consideration. Will the Analysts be located within the user services portfolio, be more closely aligned with collections, or be associated with another area of the library. Will the analyst report to a single administrator or to the library’s administrative team? While it may be easiest for an Analyst to report to a single individual, even if tasks are proposed or assigned by several others, distributing reporting relationships may be appropriate in some instances. How much independence will be afforded to the Analyst, and how broad will the scope of the Analyst’s role be? The answer to this question may depend upon the library’s organizational structure, as well as the working styles and capabilities of the Analyst and the individuals to whom the Analyst reports. How much weight will be placed on Analyst recommendations? Will library administrators be willing to support Analyst recommendations and change existing policies and practices based upon Analyst input and data?
Questions related to workload and activities must also be considered. How much work is determined in advance for a new Analyst? Administrators may be eager to assign a list of existing projects to the Analyst which the library has not been able to accomplish due to lack of time or staff. Will projects be specifically assigned to the Analyst, or should he or she be proactive in identifying projects to pursue.

Depending upon an internal candidate’s existing skill set, questions of training should also be considered. Will any specialized training be required to supplement the candidate’s existing skill set, and if so, is funding available to support this? To help Analysts remain abreast of trends, innovations, and best practices, professional development opportunities from both within and outside of traditional library venues must be supported. Technical or professional skills, such as website usability or assessment, must either be brought to the position, or learned through targeted training and development activities.

Analysts must have the ability to analyze facts and statistics, synthesize and visualize data for understanding by others, and make recommendations. The ability to work within the limitations of a library’s budget, policy, culture, or resources while identifying and advocating for improvements that are based on sound judgment or analysis is important. Additionally, Analysts should be able to anticipate what information or analysis might be needed, both for known assignments and for possible future projects.

A strong focus on the library user and interest in recommending improvements based on identified staff and user needs is necessary, along with the ability to coordinate, motivate, and manage individuals who may not directly report to your position. Analysts must have the ability to prioritize, follow-up, manage their time and workload, and lead projects and people. An understanding of and commitment to the library’s mission, values, goals, and strategic directions
is also essential to guide an Analyst’s work. While trust and respect for the Analyst is required of library administration, the Analyst must be politically adept and discrete as he or she talks to and works with a wide variety of individuals throughout the organization. Credibility, integrity, and objectivity is also essential, along with strong interpersonal and communication skills.

Analysts must consciously make themselves visible and valuable to others within the library to illustrate the worth of their position and their skills. Because the role within the organization is new, it is important for an Analyst to continually demonstrate and emphasize the unique benefits the position brings to the library. While it is imperative to establish and maintain positive working relationships with as many colleagues as possible to support existing and future projects, Analysts must refrain from showing favoritism toward any library unit or individual, as neutrality may be needed for projects impacting multiple areas of the library.

The lack of similar roles within other academic libraries poses a challenge for the UCSD Libraries’ Analysts, limiting the pool of professionals from which they may learn and collaborate. The fact that future employers or external colleagues involved in the peer-review appraisal process might not understand the Analyst role or its value to the library is a concern, despite a wealth of skills transferrable to positions both within and outside of the Libraries. The AUL/User Services understands this and diligently works to explain the analyst’s role to others.

Conclusion

As libraries face increased pressure to justify their value to users and the resources needed to accomplish their mission, there is a heightened need for valuable qualitative insight and quantitative data to inform decision-making. To address this, the UCSD Libraries has identified and reassigned staff to solicit, produce, analyze, summarize, and document
information needed by library administrators. In the first several years of their new assignments, both the Decision Support Analyst and the User Services Technology Analyst have demonstrated the value of solid data to support decision-making and comparisons, facilitated the completion of ongoing projects, and permitted the advancement of new initiatives. The Analysts have provided the AUL/User Services with information that has allowed her to evaluate issues or ideas prior to making critical public services related decisions, or directing or allocating resources. The Analysts have also helped the AUL/Services to identify projects or opportunities that should not be pursued, saving the library from making inappropriate or ineffective staff and resource investments.

A lack of staffing to investigate and implement new initiatives often means that potentially valuable innovations fall to the wayside so that existing services may be sustained. Analysts can further investigate ideas, lead implementation efforts, and coordinate others in advancing desired projects. Through conference attendance, professional readings, and interaction with colleagues at other institutions, Analysts may identify new ideas for service additions, modifications, or enhancements; assessments; and emerging technologies and tools. Analysts can help inform library decisions to change, update, or even eliminate existing services. Libraries considering adopting an Analyst model, however, must carefully consider an Analyst’s reporting relationships, potential projects, and overall role within the library’s organizational structure.
Attendance at the Library Assessment Conference has grown from approximately 250 at the inaugural 2006 event to 350 in 2008 and 450 at the third and most recent event in 2010.

James Fish, Jennifer Rutner, and ZsuZsa Koltay, "Using Today's Numbers to Plan Tomorrow's Services: Effective User Services Assessment" (ALA Annual Conference and Exhibition, LA, New Orleans, June 26, 2011); ALA Committee on Research and Statistics, "Maybe It Has Already Been Done: Locating Existing Data for Planning, Assessment, and Advocacy" (ALA Annual Conference and Exhibition, LA, New Orleans, June 27, 2011).

In 2005, Newsweek and the 2006 Kaplan/Newsweek College Guide named UC San Diego the “hottest” institution in the United States for students to study science.

Academic Impressions, “Strengthening the IT/Library Staff Partnership” (webcast, December 16, 2010); Academic Impressions “Strategic Planning for Library-IT Collaboration” (webcast, February 3, 2010).