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Academic partners with benefits

An alternative approach to a fee-based library research service

Libraries have been offering fee-based research services since the mid-20th century. These services are provided by all types of libraries, from public, academic, and health sciences libraries to historical societies and museums. Such services are often started after a specific demand for the service is expressed by an external constituent, leveraging the libraries' research skills and expertise to generate additional revenue.^{1, 2, 3, 4}

Fee-based research services are generally offered to nonprimary clientele and offered at an hourly rate.^{5, 6} For academic libraries, nonprimary users may include local businesses, campus entities (nonstudent/faculty/staff), or individuals or groups that want to use the information expertise of librarians to achieve their unique goals and have the means to pay for the service. In these cases, fee-based services separate the workload of nonprimary users of the library, serving as “small businesses operating within institutional constraints and guidelines.”⁷

Research and instruction librarians at the Montana State University (MSU) Library are currently engaged in a creative alternative to the hourly fee-based research service, providing in-depth research services to a campus affiliate, and receiving financial compensation for doing so. This article outlines the practical aspects of this project: the genesis of the partnership, how the financial arrangements and a Memorandum of Understanding (MOU) were finalized, the type of research conducted, and lessons learned as we move forward with the next phase of the partnership. We will also share positive discoveries that have translated to robust outcomes for both the library and the campus affiliate, MilTech.

Toward a partnership

Our relationship began in fall 2019, when MilTech approached the dean of the MSU Library and requested a meeting to discuss potential partnerships. MilTech is an MSU-based research organization providing services to governmental agency partners. Their work involves assisting with “technology scouting, identifying technology gaps and unmet needs, critical design, prototyping, and manufacturability expertise to advance knowledge, technology and manufacturing readiness levels.”⁸

During an initial meeting of senior management from MilTech and the library, attendees became enthusiastic about MSU Library support for MilTech projects in the form of in-depth research services. A unit of MilTech, the Information Research and Analysis team, specifically engages in research services and is comprised of four full-time employees. It was

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posited that MSU librarians could assist with their work in a subcontractor role (our language) on specific research assignments. From the get-go, it was emphasized as a de facto element of the partnership that there would be financial remuneration to the library for any services provided.

Next, the idea of a partnership was discussed with stakeholders within the library, beginning with the library's Executive Team. The Executive Team agreed that an intercampus research partnership with financial compensation was worth developing, provided the library's core services to campus user groups were not disrupted. Additionally, the library dean emphasized his support and encouraged creative thinking about alternate funding sources, like this potential partnership.

Several meetings were held with librarians from the Learning and Research Services (LRS) department, the team likely to spearhead future services in this area. LRS librarians have strong strategic thinking and intellection skills, which led to vigorous questioning of the broad philosophical notion of participating in a fee-based relationship. Conversations also examined logistics, including who would perform the work and how it could be incorporated within existing workloads. The idea was then shared with the full library faculty, where there was a majority interest in pursuing the idea further and echoing the Executive Team's condition that the library's core constituents (campus students and faculty) remained the library's priority.

Kris Johnson, department head for LRS and coauthor of this article, attended all meetings up to this point and was an enthusiastic supporter of engaging in a pilot project to test the soundness of the partnership. To maintain momentum on the project, she drafted a sample MOU. Iterations of the MOU were then shared between the library and MilTech in late fall 2019 and early 2020. The MOU was nearly finalized when the COVID-19 pandemic hit, and the process was put on hold as both entities focused on shifting their core services to accommodate the crisis.

In late fall 2020, MilTech reached out again to the library to gauge interest in resuming work to start the partnership. The library was ready. At this point in the process, a significant amount of time was needed to finalize remuneration details so that MilTech could formally compensate the library. The financial personnel for MilTech and the library mutually settled on a solution, and an MOU for a six-month pilot project went into effect March 27, 2021.

Crafting a Memorandum of Understanding

To create an effective MOU, the document needs to represent the interests and expectations of both parties and clearly outline responsibilities. The MOU was the key place to represent the common desire of the Executive Team, LRS librarians, and the entire library faculty that our primary constituents (faculty and students) and core services would remain a priority and not be adversely affected by this project. To address this, specifications were written into the MOU that librarians would review all research requests and provide a timeline for completion in advance of starting any project: "Depending on the time of year, responses to requests for research could take slightly longer due to university holidays or other factors such as commitments to core library services. A typical turnaround time will average 7 business days. The Library will notify MilTech in cases, such as larger research projects or during intersessions, when a longer turn-around time will be necessary."

Through this language we were able to solidify the nature of the relationship: MilTech would make requests for research, and the librarians would review the requests, scope out existing workloads, and then communicate back to MilTech a timeline for completion. Next, MilTech would determine if the proposed timeline would meet the needs of their client. The opportunity for librarians to review and propose timelines was critical to ensure core library services and primary library users were not disadvantaged, as well as to help position the pilot project as a true partnership as opposed to a series of transactional exchanges.

Because there was no way to envision the actual workflow in advance, we added the following clause: “Through an iterative process, both parties will be able to come to a good understanding about the details of the final product. This understanding will help inform the longer relationship....The relationship and processes will be discussed near the end of the pilot project. At that time, a decision will be made whether to renew with a more detailed MOU.”

Another essential component was the inclusion of the timeframe the MOU would be in effect, which provided time to test the partnership, iterate the final research products, and review progress before deciding whether to continue after six months. The language also allowed for unexpected events by adding a contingency that the partnership could be ended by either partner with two weeks’ notice.

Lastly, and most important, our MOU needed to detail the process for financial remuneration. It was determined that because both parties were MSU affiliates, thus integrated into the financial structure of the university, the library would be reimbursed for library employee time at their normal rate of pay using a university index number. The system used an EPAF (Electronic Personnel Action Form), a common system by which personnel actions can be created and approved electronically using the university’s financial system. In essence, MilTech would electronically transfer remuneration to the library whenever the EPAF process was initiated, which occurs at the end of each biweekly pay period. Internally, all hours are tracked in a shared spreadsheet for EPAF reporting.

Pilot project

Two librarians (including Taylor Moorman, coauthor of this article) who expressed interest in performing the research for the pilot project were incorporated into the communication process as the MOU was being finalized. Their work began by completing required security and nondisclosure paperwork before embarking on any research assignments. With the paperwork filed, the manager of MilTech’s Information Research and Analysis Team and a second key member of their team hosted an in-person meeting at the MSU Library. The meeting had dual purposes: to familiarize MSU librarians with the research landscape MilTech works within and to start the process of building the working relationship of two teams of researchers. With an opportunity for questions, the librarians set up expectations around final product layout (typically annotated bibliographies), citation style (APA), who to contact with questions or follow-up comments, and workflow expectations.

MilTech then shared the first request via email, the librarians reviewed the “ask,” scoped out the project with their existing workflows, and proposed a deadline in line with the process outlined in the MOU. The proposal was approved, so the librarians then worked on sections of the request, using an agreed upon format for the layout of the information in the annotated

bibliography. They set up check-in meetings with each other and their department head to work toward a polished and cohesive final product. With guidance from their department head, they created a template for annotated bibliographies that included keywords, an executive summary, searching tips and key discoveries, as well as citation formatting that would lend itself to easy use by our MilTech partners. The final product was shared with MilTech with a request for feedback in order to improve future reports.

After reviewing the research and running it by their client, MilTech team members scheduled a meeting to discuss the final product. MilTech shared that the report had exceeded their expectations and offered only formatting advice for the document. This first report for MilTech set the tone for the four projects completed during the six-month pilot phase. The partnership was developed as one of open communication, feedback, and the opportunity for both parties to continuously improve the requests and final reports. As part of this process, MilTech began hosting biweekly 30-minute meetings, typically attended by the two librarians and the primary MilTech team member. This further improved communication with dedicated time to address comments or concerns and to share strategies and advice to further improve the work.

Renewed MOU and lessons learned

In September 2021, all parties were enthusiastically onboard with the partnership that developed during the six-month pilot project. After a meeting with MilTech and library administrators, including glowing feedback from MilTech regarding the MSU librarians' work, the partnership was continued via a second MOU, this time for one full year.

During the last year of working with MilTech, the MSU librarians have had the opportunity to dive deeply into research that does not always manifest in their daily work as research and instruction librarians. Requests from MilTech led the librarians to explore in-depth library electronic resources lesser known to them, including a range of legal and business databases, as well as authoritative sources outside of the library collections. Librarians also spent initial time exploring the context of each request, familiarizing themselves with appropriate terminology and key concepts. This prep work includes examining an array of web sources to provide a comprehensive information picture in the final reports. As described by the coauthor and research librarian: "It was exhilarating to spend an extended period with a request, investigating and evaluating sources, to create robust final reports. The reports themselves were a fun challenge, as the information delivery was equally important to the success of the end products."

Conclusion

When this unique opportunity presented itself, library leaders saw it as a creative opportunity to apply our professional skills to the benefit of a campus partner. With thoughtful questioning and planning by the library, a carefully crafted MOU, and constant attention to communication from both the librarians and MilTech, a six-month pilot project resulted in an additional year of collaborative research. While the logistics of implementing a fee-based research service might feel daunting, perseverance and enthusiasm for exploring this new avenue has led to a rewarding and effective partnership that we look forward to continuing.

Notes

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4. Janice Yu Kung and Thane Chambers, "Implementation of a Fee-Based Service Model to University-Affiliated Researchers at the University of Alberta," *Journal of the Medical Library Association* 107, no. 2 (2019): 238-243, <https://doi.org/10.5195/jmla.2019.497>.
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6. Dorothy D. Smith, "Special Considerations for Fee-Based Services in Academic Libraries," *Journal of Interlibrary Loan, Document Delivery & Information Supply* 10 no. 1 (2000): 29-36, https://doi.org/10.1300/J110v10n01_04.
7. Ward, "Library Fee-Based Information Services: Financial Considerations."
8. Montana State University (n.d.), MilTech, retrieved February 24, 2022, from <https://www.montana.edu/miltech/>. 