University Libraries Management Team

September 2, 2014
Location: N210

Present: Hollis, Montgomery, Williams, Austin, Knievel, Reynolds, Moeller, Fong, Hayworth, Maness

1. Future Directions for outreach and engagement – addendum 1 and attached .pdf
   Alison Hicks and Caroline Sinkinson visited Management Team as representatives of the Instruction Working Group (IWG) to discuss future directions for outreach and engagement in the Libraries. Please see addendum 1 below and the attached .pdf for more information.

   In order to understand this presentation the following definitions may be helpful:
   Marketing: handouts/swag/cool stuff we give to patrons
   Outreach: ongoing relationships we build with patrons
   This presentation is focused on outreach.

   Outreach is part of the 3 core values of ALA, is a focus of the campus, and is related to student retention. If we have a proper outreach program in place we can create robust relationships with students.

   The working group made the following recommendations:

   IV. Recommendations
   The Instruction Working Group recommends that this document serves as an initial step towards the facilitation of a broader conversation that will focus on the development and adoption of a systemic, structural, libraries-wide approach to outreach and engagement. It is clear from this analysis and our peer institutions, that ideal goals include revisiting our conception of outreach and engagement, as well as looking at staffing and structure:

   Ideal Goals
   ● Conception: The libraries must understand and be able to clearly differentiate between outreach and engagement needs versus marketing and promotion needs.
   ● Staffing: An ideal structure and vision would include a staff outreach position for Norlin, to match branch staffing, as well as a structured libraries-wide coordinator role (faculty) that focuses on academic outreach and engagement.
   ● Structure: Due to the nature of academic outreach and engagement, (for example, the focus on collaborative and ongoing partnerships rather than one-time marketing opportunities), a natural fit for this position is a teaching and learning department rather than in an administrative communicative structure.
   ● Systemic: Other takeaways from this analysis include the need to make outreach and engagement more systemic throughout the libraries.

   These recommendations mirror peer institutions’ models.

2. Scholarly Communications Working Group Charge
Andrew Johnson and Thea Lindquist visited MT to discuss the Scholarly Communications Working Group (SCWG) Charge.

SCWG is proposing a revised charge for their group. One change is group membership. Jennifer Chan, Scholarly Communications Librarian, has taken over much of the work that was given to SCWG. They would like to revise their charge to better support Jennifer in her role.

SCWG would like to change their working group name to “Scholarly Initiatives Working Group” with three teams to perform advisory roles. The teams would be: Research Data Services Team, Scholarly Communications Team, and the Digital Initiatives Team.

This team approach has been working well for the Service Points Working Group (SPWG). The charge and reimagining of the way the group is structured seem to exemplify the flexible working groups that were envisioned during reorganization.

Stay tuned for more information about this change.

3. **Diversity Task Force Update – Laura Burfield**

Laura Burfield visited MT to give an update on the work of the Diversity Task Force.

To help bring the Libraries goals into focus, the DTF is charged with identifying methods by which diversity can be brought into higher profile in the University Libraries workplace through consideration of one-time mechanisms and with a focus on sustained efforts. The DTF should propose structural changes to MT to promote diversity in an ongoing fashion and assist in the implementation of these structural changes as requested by MT.

The task force has been analyzing, visualizing, and discussing data from the climate survey.

At the next All Libraries Meeting (October 13 from 2-4 pm) there will be a performance from the Interactive Theater Group customized to our organizational diversity concerns based on the diversity climate survey—there will be no role playing as part of the presentation. Everyone will have access to the data the group has received and visualized. Following the All Libraries Meeting there will be opportunities to discuss the findings and ways to move forward.

4. **Future Directions for Promotions and Outreach – addendum 2**

MT discussed future directions for Promotion and Outreach unit. One aspect of this direction is to search for and hire a Marketing Manager in a University Staff (OEP) position. MT reviewed and approved the draft position description. The Marketing Manager will oversee all marketing-related activities in the Libraries and will report to the new Associate Dean. The Promotions and Outreach unit will become the Marketing unit. More details to follow pending revisions to the position description.

5. **Dean’s Update**
The Dean’s Council meeting focused on the importance of our responsibility to the Department of Justice regarding Accessibility. The Libraries has already had a discussion about this with Disability Services. Stay tuned for more information about our accessibility initiatives.

Jim gave an update on the Open Access Policy. It is going to the Boulder Faculty Assembly (BFA) for a vote. Graduate students and research faculty have utilized our Open Access Fund. There was discussion about how to fund the project; no decisions have been made regarding funding at this time.

Jim presented good news to the Dean’s Council: since we’ve put up our institutional repository (IR) we have had 8,000+ downloads. We are standing up and supporting strategic issue of promoting our role in the creation of new knowledge. Many of the items that will be openly available in the IR will have been funded by the Open Access Fund.

Enrollment is holding steady. There are 5,800 first-year students enrolled.

6. Updates and Announcements – if time remaining

Upcoming meetings

- September 16 - tentative interview with strategic planning consultant Susan Skjei; brainstorm listening tour/world café questions
- October 7 – Norlin Renaissance; Small dollar purchase process for department directors

Management team minutes are available online: http://ucblibraries.colorado.edu/adminservices/management/index.htm
Addendum 1

**Future directions for outreach and engagement at CU Boulder Libraries**
Jorge Ricardo Lopez-McKnight, Alison Graber, Alison Hicks on behalf of the Instruction Working Group
June 2014

I. Definition
In alignment with the University of Colorado, Boulder outreach definition, the Instruction Working Group defines academic outreach and engagement as **connecting, educating, and building relationships with students, faculty, staff, and learners beyond our campus, by collaborative efforts which integrate and support our mission and values.**

Outreach and engagement brings valuable teaching and learning opportunities to the numerous communities we partner with, while also positioning the University Libraries in a campus wide, Learner-relevant context. Our focus and goals include increasing awareness of and learning about our services, resources, and spaces among CU Boulder students, faculty, and staff, as well as extending outreach and engagement efforts to local, state, and regional community groups. We are also interested and committed to exploring new opportunities that support our aims.

Though we understand the value of marketing and branding for the University Libraries, we see fundamental differences between those and academic outreach and engagement. While marketing and branding is focused on conveying messages and having a visual identity, academic outreach and engagement is active, explorable, and community-based that incorporates the learning and experiences of the various partnerships we form and brings in a critical teaching and learning component.

**Outreach & Engagement to Students**
Our academic outreach to students connects the libraries to their learning and experience through tours, open houses, orientations, and events that incorporate teaching and learning opportunities.

**Outreach & Engagement to Faculty and Academic Departments and Programs**
Our academic outreach and engagement to faculty and academic departments and programs focuses on maintaining and building established relationships with faculty, and academic departments and programs, as well as developing new collaborative opportunities, through research, teaching, and communication of our services, resources, and spaces.

**Outreach & Engagement Non-Academic Departments and Programs**
Our academic outreach and engagement to nonacademic academic departments and programs connects and develops relationships with various programs in student affairs (Student Outreach and Retention Center), student organizations (CU Student Government), and campus resources (Counseling and Psychological Services) that positions the library in student, staff learning and experiences.

**Outreach & Engagement to the Local, State, Regional, and Global Community**
Our academic outreach and engagement to the various communities outside of CUBoulder is focused on events, displays, exhibits, and art shows. Additionally, we work with local high school groups by offering tours, information literacy sessions, and guided research assistance.

II. CU Libraries Environmental Scan
In Fall 2013 to Spring 2014, we surveyed all teaching librarians with a questionnaire that probed for details about formal and informal outreach activities that had been taking place at individual libraries, and as a result of subject specialist duties. The survey asked for a brief description of the event, the target audience, costs, materials used, staffing and whether the event was still running. We received 23 responses from all four public service departments (Arts and Humanities, Archives and Special Collections, Social Sciences, Sciences). Respondents highlight an interesting snapshot of data and trends about outreach at the University Libraries, including the range of activities, audience, materials and roles. While the survey was also sent to the Programming & Communications Librarian, we have yet to receive a response.

Activities
Responses from the survey show that teaching librarians and branch outreach staff engage in a variety of outreach activities throughout the year. These can be classified as partnerships with established CU events; internal events; and outreach that ties in with national events.

**Partnering with established CU events**
This category includes occasions when CU librarians partner with broader campus initiatives, either through participating in fairs and events outside the library (e.g. Study Slam), or extending the event within the libraries (e.g. Admitted Student Day tours). The full listing includes:
- Study Slam
- CULEAD
- Alliance Fall Oktoberfest First-Year Welcome Event
- Admitted Student Day
- CEAS Organization & Society Fair
- Buff Essentials
- Leedsapolooza Table
- French Week
- Audition Day Tours
- Business Leaders Program

**Internal Outreach Events**
This category includes outreach events that are initiated and held within the library due to the identification of a need that is not currently met. This includes:
- CrunchTime
- Graduate Student Open House
- International Students Workshop
- Exhibition Receptions

It is worth pointing out that none of the internal events are currently ongoing, except for exhibition events. Respondees generally highlighted staffing or support issues as reasons why these events were no longer in existence.

**Tieing in with National Events**
This category included events to tie in with national events.
- Earth Science Week

**Audience**
These activities targeted individuals at almost every stage of their CU experience, from high school students, through admitted students and their families, to current undergraduate and graduate students. Activities were also designed for less visible groups on campus, for example international students and members of marginalized groups.

**Materials**

Material needs for these events was fairly modest, with most adding up to under $100. Typical requests included:

- **Paper Resources:** Handouts, Flyers, Research Consultation Handouts, Bookmarks
- **Edible Resources:** Drinks, Snacks, Candy
- **Swag Resources:** Study Survival Kits, Pens, Highlighters, Buttons

**Roles**

A variety of people assisted with these events, including subject librarians and branch staff with outreach responsibilities written into their positions: Laura Burfield (Engineering), Melissa Harden (Map/Earth Sci), Grace Haynes (Music), Jorge Ricardo LopezMcKnight (Engineering) and Kate Tallman (Gov Info).

**Summary**

In summary, a wide variety of activities are taking place at the libraries already. However these tend to be located in the branch libraries, and in conjunction with external events. While targeted audiences demonstrates that we are meeting many students, certain groups are still excluded and events remain uncoordinated and haphazard. The number of outreach positions in branch libraries has dramatically increased engagement, although this also serves to highlight how Norlin patrons are being poorly or underserved.

### III. Peer Institution Environmental Scan

An environmental scan was done (Spring 2014) to ascertain how outreach and engagement activities are defined and structured by the 34 public universities in the AAU (Association of American Universities) that are considered peer institutions of the University of Colorado Boulder University Library. All but four of these universities were also ARL institutions. Library websites were examined to determine how each institution defines, structures, and implements outreach activities. While virtually all of our peer institutions indicated some type of outreach / engagement events, fewer than half of the libraries provided any type of guiding definition / mission / charge. Four institutions stood out in regards to the comprehensiveness of their approach to outreach: Indiana University (IU), University of California Santa Barbara (UCSB), University of Kansas (KU), and University of Oregon (UO).

**Definition / Vision**

Each institution differed in the scope of their outreach/engagement activities. UCSB and KU had the broadest vision of outreach. UCSB defines outreach as “managing and raising the public profile of the Library both on- and off-campus...Working together with campus offices, student organizations, and academic departments...to showcase the Library's engagement with the teaching and learning mission of the University” while KU “includes effective engagement with incoming and returning students; outreach to lifelong learners throughout our local, state and regional community and the promotion of scholarship throughout the KU community and beyond.” UO and IU both focus specifically on student success. UO focuses on “developing partnerships with campus departments to help students achieve academic success” and IU focuses on undergraduates and diverse populations “seeking to define, evaluate and implement distinct ways in which diverse populations can be reached and gain access to
cultural, heritage, and educational materials and also extend and increase outreach services and programs to these groups.”

Structure / Implementation
Each institution has developed unique structures to support and implement their outreach activities. UCSB has an Outreach and Academic Collaboration Department that includes an AUL for Outreach and Academic Collaboration; Outreach Coordinator; Events & Exhibitions Coordinator; Graphic Designer; and Web Designer. KU, which has a similar vision of outreach, has a diverse structure of support including multiple units and centers: Communications, Advancement & Administration; Center for Community/Affiliate Initiatives & Engagement; Center for Faculty/Staff Initiatives & Engagement; and Center for Graduate Initiatives & Engagement; and Center for Undergraduate Initiatives & Engagement. Those libraries concentrating on students have less robust support structures. UO has situated outreach within the Instruction Services Department with specific positions such as: Director of Communications & Marketing and an Instruction and Campus Partnerships unit that includes an Instruction and Campus Partnerships Librarian as well as an Outreach and Student Engagement Librarian. IU has a number of positions emphasizing outreach that include: an Outreach and Engagement Librarian, an Undergraduate Education Librarian, and a Multicultural Outreach Librarian.

<table>
<thead>
<tr>
<th>Institution</th>
<th>Home Department</th>
<th>Positions</th>
</tr>
</thead>
<tbody>
<tr>
<td>UCSB</td>
<td>Outreach and Academic Collaboration Department</td>
<td>AUL for Outreach and Academic Collaboration; Outreach Coordinator; Events &amp; Exhibitions Coordinator; Graphic Designer; and Web Designer</td>
</tr>
<tr>
<td>KU</td>
<td>Communications, Advancement &amp; Administration; Center for Community/Affiliate Initiatives &amp; Engagement; Center for Faculty/Staff Initiatives &amp; Engagement; Center for Graduate Initiatives &amp; Engagement; and Center for Undergraduate Initiatives &amp; Engagement</td>
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<tr>
<td>UO</td>
<td>Instruction Services Department</td>
<td>Director of Communications &amp; Marketing; Instruction and Campus Partnerships Librarian; Outreach and Student Engagement Librarian</td>
</tr>
<tr>
<td>IU</td>
<td>Teaching and Learning</td>
<td>Outreach and Engagement</td>
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</table>
Summary
There are a variety of definitions and structures used by our peer libraries to address outreach and engagement activities. The scope of the vision appears to determine how robustly library structure supports outreach. Those libraries with broad reaching goals have specific units / departments / centers that focus on outreach and collaborating both within and outside of the university community. Those libraries with a narrower focus use specific positions, both librarian and staff, to implement outreach and engagement activities. This peer analysis also highlights how instruction or teaching and learning departments often form a natural home for these activities.

IV. Recommendations
The Instruction Working Group recommends that this document serves as an initial step towards the facilitation of a broader conversation that will focus on the development and adoption of a systemic, structural, libraries-wide approach to outreach and engagement. It is clear from this analysis and our peer institutions, that ideal goals include revisiting our conception of outreach and engagement, as well as looking at staffing and structure:

Ideal Goals
• **Conception:** The libraries must understand and be able to clearly differentiate between outreach and engagement needs versus marketing and promotion needs.
• **Staffing:** An ideal structure and vision would include a staff outreach position for Norlin, to match branch staffing, as well as a structured libraries-wide coordinator role that focuses on academic outreach and engagement.
• **Structure:** Due to the nature of academic outreach and engagement, (for example, the focus on collaborative and ongoing partnerships rather than one-time marketing opportunities), a natural fit for this position is a teaching and learning department rather than in an administrative communicative structure.
• **Systemic:** Other takeaways from this analysis includes the need to make outreach and engagement more systemic throughout the libraries.

Steps to implementation:
• a broader conversation throughout the libraries to determine vision and goals for outreach and engagement, which a committee or taskforce would undertake
• an examination of current organizational structure to determine how to support outreach and engagement
• adding positions dedicated to outreach and engagement
  ○ staff outreach position for Norlin
  ○ libraries-wide coordinator role for academic outreach and engagement

Addendum 2 – draft position description
**Job Summary**

Working collaboratively across the Libraries, the campus, and the local community, the Marketing Manager advances the Libraries mission, vision, and goals by developing and implementing a cogent strategy for communications and marketing that promotes the mission and goals of the University of Colorado Boulder Libraries. This position manages marketing, advertising, promotional, and other communication activities of the Libraries and effectively publicizes library resources, services, programs, and events. This includes strategic planning, public relations, marketing, advertising, promotional design, and communication activities of the organization. The person in this role will be responsible for successfully marketing library resources, services, programs, exhibits, and events to campus and community stakeholders, including students, faculty, administration, donors, and Friends of the Library. The program should also promote the reputation and quality of CU Libraries to external audiences including the Association of Research Libraries, Colorado Alliance of Research Libraries, Greater Western Libraries Alliance, and to other higher education institutions. The Manager serves as liaison to Campus Communications to ensure we are in compliance with the campus brand and recommended templates. Currently: blank

**Position Review Information**

| Full/Part Time | Full-time
|----------------|------------------|

**Duties**

<table>
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<tr>
<th>Brief Description</th>
<th>Information Gathering and Building and Maintaining Lines of Communication Internally and Externally (15%)</th>
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<td></td>
<td>On a continuous basis, work with the Libraries Executive Committee, Management Team, Unit Heads, Libraries working groups, staff, faculty, students, and patrons to identify, review, and evaluate perceived needs for marketing and communication.</td>
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<td>Percentage of time</td>
<td>15 Currently: blank</td>
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<tr>
<td>Brief Description</td>
<td>Budgeting (5%)</td>
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<td>Work with Executive Committee, Budget Officer, and other Libraries staff to develop and propose marketing and communications budget. Manage/oversee all relevant expenditures.</td>
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<tr>
<td>Percentage of time</td>
<td>Brief Description</td>
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<td><strong>Strategic Planning (15%)</strong></td>
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<td><strong>Currently: blank</strong></td>
<td>On the basis of information continuously gathered, develop marketing and public relations plans and strategies that communicate the value of the Libraries resources and services to users (students, staff, faculty, administration, and public patrons) and the state of Colorado.</td>
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<td><strong>Currently: blank</strong></td>
<td>Develop an internal communication plan in collaboration with, and incorporating input from, the Management Team and other Libraries faculty and staff.</td>
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<td><strong>Currently: blank</strong></td>
<td>Develop a coordinated communications strategy in collaboration with the Virtual Presence Working Group and the Marketing Team.</td>
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<td><strong>Currently: blank</strong></td>
<td>Develop and provide strategic direction for the Marketing team.</td>
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<td><strong>Currently: blank</strong></td>
<td>Monitor industry trends that impact the market and incorporate findings in strategic planning to support the Libraries’ marketing efforts.</td>
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<td><strong>Currently: blank</strong></td>
<td>Develop and design marketing and public relations proposals and recommend implementation strategies to the Executive Committee.</td>
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<td><strong>Currently: blank</strong></td>
<td>Develop and design effective marketing campaigns using a variety of traditional and non-traditional media, including print, online (Web pages), social media (Twitter, Facebook, YouTube, etc.), and e-mail.</td>
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<tr>
<th>Percentage of time</th>
<th><strong>Currently: blank</strong></th>
<th><strong>Internal Communications (20%)</strong></th>
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<tr>
<td><strong>Currently: blank</strong></td>
<td>Implement, coordinate, and evaluate the internal communication plan in collaboration with the Management Team and other Libraries faculty and staff.</td>
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<td><strong>Currently: blank</strong></td>
<td>Implement and oversee the coordinated internal communications strategy.</td>
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<th><strong>Public Relations/Marketing (35%)</strong></th>
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<td><strong>Currently: blank</strong></td>
<td>Manage, coordinate, and oversee the implementation and evaluation of marketing and public relations activities that support the mission and goals of the Libraries. Create media and marketing campaigns on behalf of the Libraries and assess results.</td>
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<td><strong>Currently: blank</strong></td>
<td>Develop and maintain a Libraries’ brand and voice in keeping with campus branding standards.</td>
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<td><strong>Currently: blank</strong></td>
<td>Write, edit, produce, and distribute publications, news releases, and videos for external and internal Libraries audiences using a variety of media.</td>
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</table>
Implement and evaluate marketing and public relations plans that communicate the value of and that promote Libraries resources and services to users (students, staff, faculty, administration, and public patrons). This should be accomplished in collaboration with the Libraries Working Groups.

Actively seek opportunities to promote the Libraries to the public.

Manage the development, distribution, and maintenance of all print and electronic collateral, including news releases, fact sheets, and social media messages. Collaborate with colleagues engaged in outreach and instruction to coordinate Libraries social media communications. Ensure consistency of branding and message in all internal and external materials.

Coordinate internal/external designers and outside vendors to complete campaigns.

Collaborate with the Culture, Arts, Libraries, and Music Advancement Team and Friends of the Libraries as needed to help plan and support Libraries’ events, other donor activities, and related communications.

Serve on Virtual Presence Working Group.

Other duties as assigned related to Libraries’ communication, promotion, and outreach.

Evaluate outcomes. Monitor, review, assess, and report to the Executive Committee and Management Team regarding all marketing and public relations plans, activities, and results.

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<th>Percentage of time</th>
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**Brief Description**

**Supervision (10%)**

Supervise graphic designer and student workers. This includes developing and setting goals for all employees supervised as well as hiring, training, directing, and evaluating those supervised.

Develop, organize, implement, and manage unit policies, procedures, programs, and other activities.

Ensure achievement of unit goals.

Review, recommend, and implement policy changes.

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<th>Percentage of time</th>
<th>10</th>
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**Line/Staff Authority**

Edit

Check the category that best describes the position's formal, direct supervisory and/or staff authority status.
Authority Category | Supervisor
---|---
Currently: blank

Supervision received and exercised: list position numbers of direct reports

Supervises Arts Professional I, 691758, and may supervise various student employees. Reports to Associate Dean of Libraries, 691791. Currently: blank

Essential Functions Edit

I. Physical Demands

Please refer to definitions to the below selections here: [https://www.cu.edu/sites/default/files/pages/884-documentation-resources/docs/functional-attributes.pdf](https://www.cu.edu/sites/default/files/pages/884-documentation-resources/docs/functional-attributes.pdf)

| General Physical Demands Definition | Light
---|---
Currently: blank

| Physical Demands Specific | Color Vision, Depth Perception, Fingering, Handling, Near Acuity, Talking
---|---

II. Mental Functions

Please refer to definitions to the below selections here: [https://www.cu.edu/sites/default/files/pages/884-documentation-resources/docs/functional-attributes.pdf](https://www.cu.edu/sites/default/files/pages/884-documentation-resources/docs/functional-attributes.pdf)

| Mental Functions Selections | Analyzing, Communicating, Comparing, Compiling, Computing, Coordinating, Copying, Instructing, Interpersonal Skills/Behaviors, Negotiating, Synthesizing
---|---

Qualifications Edit

Title Minimum Qualifications

Qualifications
| Minimum Qualifications | Bachelor’s degree in Marketing, Communications, Journalism, Advertising, Public Relations, or related field or any equivalent combination of training and experience.  
Five years of progressively responsible experience in marketing, public relations, communications, or related field.  
Public relations, editing, writing, event planning, and publication planning experience.  
Media relations experience and the ability to work with several constituencies from students to University administrators.  
Knowledge of web-based public relations and applications of social media communications.  
Creative ideas and innovative approaches to marketing and communications.  
Currently: blank |
|---|---|
| Required Competencies: Knowledge, Skills & Abilities | Strong communication, interpersonal, organizational, and customer service skills.  
Ability to multitask and work in a team environment.  
Currently: blank |
| Preferred Qualifications | Master’s degree in Marketing, Communications, Journalism, or related field.  
Managerial experience in Marketing or Public Relations fields.  
Experience or education in graphic design.  
Knowledge of libraries and higher education.  
Demonstrated ability to cultivate and advocate for an environment of diversity and inclusion.  
Ability to work effectively and creatively to develop partnerships in a complex and rapidly changing library, campus, university system and community.  
Currently: blank |
| Do you think this position requires a special qualification that differs from the established minimum qualifications for other positions in the class? | No  
Currently: blank |

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