

Developing a New Model and Organizational Framework for Liaison Librarians

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Setting the Change Stage

In 2013, the University of Maryland Libraries undertook a major revisioning of its liaison program as a result of two converging task forces. As with many other academic libraries, the University of Maryland Libraries realized that rapid changes in higher education necessitated a reconceptualization of the existing liaison program in order to address emerging needs and to develop core competencies and methods of assessment to evaluate librarians' work. The results of both of these task forces have converged into a new model of liaison librarianship that is integrated into the new Research Commons (RC) organizational unit. This chapter will discuss the planning and implementation of these task force recommendations and how these reports led to a broader vision for the University Libraries.

The University of Maryland (UMD) is a large public research university located in College Park, Maryland, just a few miles outside of Washington, DC. The university is the flagship campus of the University System of Maryland and has a total enrollment of over 26,000 undergraduates and 10,000 graduate students and close to 100 undergraduate majors and over 200 graduate programs. It is a Carnegie Research 1 University with over 1,500 tenured or tenure-track faculty and over 4,400 total faculty members. The University Libraries at UMD consists of eight libraries, including McKeldin Library, the main library on campus. The libraries broadly support the research and teaching mission of the university and are ranked at 42 on the Association of Research Libraries' 2015–2016 ranking of research libraries by expenditures with a budget of nearly \$29 million.¹

I. Warm-up Phase

STAGE 1: ESTABLISHING A SENSE OF URGENCY

In recent times, much has been written about the roles of liaison librarians. In 2009 the Association of Research Libraries (ARL) published a special report on liaison librarian roles, which addressed the emerging roles for liaison librarians and how institutions started to develop strategies to support such programs.² Four years later, in 2013, a new ARL report by Janice Jaguszewski and Karen Williams, *New Roles for New Times: Transforming Liaison Roles in Research Libraries*, noted further changes in the library environment, including shifts in student learning, technology, and scholarly engagement, which contributed to further transformation in the roles of liaison librarians. The focus has shifted from what librarians do to what users do.³

At the same time, measuring impact and accountability have become second nature to higher education across all areas. It also has become increasingly important for libraries to assess all operations and services, including liaison work. *Assessing Liaison Librarians: Documenting Impact for Positive Change* by Daniel C. Mack and Gary W. White examined how academic libraries evaluate their liaison activities and offered recommendations on how to document impact.⁴ In 2015, Columbia University, Cornell University, and the University of Toronto partnered with ARL on a first-of-its-kind library liaison institute where subject librarians of these institutions discussed future models for structuring liaison work in their workplaces.⁵ *Evolution of Library Liaisons* by Rebecca Miller and Lauren Pressley offered case studies of liaison programs from about seventy ARL member libraries.⁶ “Transforming a Library: Strategies for Implementing a Liaison Program” by Yelena Luckert provided practical solutions for the change.⁷

There has also been a great deal of literature on how librarians can effectively support various components of the research life cycle, with a smaller number of pieces focusing specifically on the development of RCs or related concepts such as scholars’ commons or digital scholarship centers. The Coalition for Networked Information presented on this concept at its 2016 membership meeting, outlining the work at Ohio State University.⁸ There are several case studies, including those at Duke University, UNC Chapel Hill, and Florida State University.⁹

With a knowledge of national trends in liaison librarianship, the library administration sought to investigate the current roles and activities of our liaison librarians and to conduct a study to examine how librarians could best support researchers in an environment with rapidly changing technologies, pedagogies, and publishing models. As part of this study, the libraries were interested in exploring how to best support desired new liaison responsibilities as well as developing an assessment program to evaluate liaison activities. At the same time, the libraries were aware that campus resources to support research were widely dispersed without an overarching framework. This resulted in researchers having to navigate a complex ecosystem in order to identify and find support for the various aspects of the research life cycle.

STAGE 2: CREATING THE GUIDING COALITION

The administration of the Public Services Division charged two task forces with an overarching goal of providing outstanding support for research on campus. The two

task forces were created simultaneously in 2012 to make recommendations for reengineering our liaison program and to explore the development of the RC. The scope of these studies varied. The work of the liaison task force was largely internal, led by liaison librarians in the Research and Learning Department. The RC task force, while consisting of members of the libraries from several different units, also recognized the need to coordinate with other major units on campus, including the Office of Research, the Division of Information Technology, and the Graduate School.

The liaison task force was charged with examining how our liaison program could be revised to address contemporary needs in supporting faculty and student research and teaching and to develop a model of assessment that could be used to improve our liaison activities. As part of their work, the members of the task force examined national trends, emerging literature, and models in place at peer institutions in addition to internal documents and data related to liaison activities. The RC task force used a similar approach and also conducted interviews with stakeholders and other institutions as well as administered an internal survey to UMD faculty and students. As part of the overall planning, these projects were reviewed and approved by the library administration and were shared in the planning and execution stages with the entire library staff.

The liaison task force was comprised of four library faculty, including the Associate Dean for Collections Strategies and Services, the Head of the Research and Learning Department, and two subject specialists. The RC task force consisted of five subject librarians, the head of our Teaching Department and one graduate assistant. While a variety of others from various departments and units were consulted by both of these groups, in hindsight having a member of the Information Technology Department on the RC task force would have been useful. Both groups were formally charged by the Associate Dean for Public Services and given a written charge, which included stated goals and a timeline. Both task forces were led by strong leaders in the libraries who were recognized by others in the organization as credible and knowledgeable librarians, and thus their recommendations were readily accepted by the administration and the vast majority of librarians and staff. Both teams operated very efficiently and worked very well together, a dynamic that we believe was the result of having given the task force members clear guidelines and responsibilities.

STAGE 3: DEVELOPING A VISION AND STRATEGY

For both of these groups, there was a very broad but not overly defined vision. The first, for the liaison group, was to develop a robust liaison program that encompassed the variety of work that our liaisons do and to develop a framework of core competencies, methods of assessment, and a training program and other professional development tools to assist our liaisons in meeting some of the new challenges of their roles. The vision for the RC was similar in that it was broad. The RC task force was asked to create a suite of services and spaces in conjunction with other campus partners that would support researchers at all stages of the research process. We referred to this as a vision for a “one-stop shop,” where researchers could find support for any aspect of the research life cycle in one location, rather than the very dispersed and confusing array of services in multiple locations across campus.

It was during the initial phases of both groups that the leaders of the task forces and library administrators discussed how these two initiatives were merging into a more unified vision than previously expected. The work of the liaison task force revealed that many facets of liaison librarianship were directly related to the research life cycle and the desire to offer more effective, streamlined services. The concept of the RC and its implementation were likewise very dependent on the work of our liaison librarians as well as their support. At this juncture, Public Services administration decided to begin communications with librarians around the work of both task forces, with a recognition that the outcomes of the two task forces would be separate but with a great deal of interconnectivity.

STAGE 4: COMMUNICATING THE CHANGE VISION

The two task forces completed their work in 2013, the liaison task force in May and the RC task force in July. The liaison task force presented a framework of core competencies in five broad areas: collections content and access; reference and research consulting and mentoring; teaching, learning, and literacies; outreach and engagement; and scholarly communications and research data services. For each of these five areas, the task force presented an overview of the work, a list of concrete expectations, behavioral guidelines, and methods and resources for assessment and evaluation. The task force also included sample liaison job descriptions and sample liaison best practices.¹⁰ The RC task force's report provided a service model including staffing and a gradual implementation plan. It also included a space plan addressing design aspects and staffing. The report included a detailed three-phase implementation plan to take place over several years as well as a marketing plan that could be used to communicate the vision to both internal and external audiences.¹¹

During the late summer, we held several forums for each group to present and discuss their findings and recommendations. Both groups also presented their work to the library's administrative team, getting approval to proceed with the implementation of recommendations. Communicating and garnering support for the work of the liaison task force from among liaison librarians was the most challenging aspect, detailed in Stage 5. In fall 2013, the library administration discussed both plans with both the provost and the Senate Library Committee. During this time, the library administration also initiated and conducted meetings with the leadership teams of the other colleges on campus. All of these discussions served to gain approval and to also communicate the vision for these changes to campus constituents. At the same time, they were a reminder to campus leaders of how much the library can support research activity on campus.

II. Introducing New Practices Phase

STAGE 5: EMPOWERING BROAD-BASED ACTION

In the process of implementing the liaison and the RC models, we have encountered a number of obstacles, some more significant than others, but typical to other organizations. We understood early on that in order to find solutions that will work for the UMD Libraries, we would need to tackle these challenges one at a time. We set up building consensus and support for each step in the process. At the same time, we took careful

steps to avoid anxieties and burn out, which often lead to resentment of change on the part of the staff.

Some of these obstacles were purely organizational in nature and required single-handed administrative solutions, such as the restructuring within Public Services. Each one of the libraries located directly on the College Park campus, including the main one, is defined by its concentration of subjects and houses subject librarians serving students and faculty in those disciplines. Before the reorganization, each of these locations had varied expectations of its librarians, which contributed to staff concerns about equity. As the first order of business, all subject librarians were administratively combined into a single department, Research and Learning (R&L). Although branches still remain units within R&L managed by their unit heads, administrative unification of everyone into one department under single leadership enabled standardized expectations and deliverables for all subject librarians. Being in one department promoted and increased cooperation and coordination across locations and purposes, allowed for more systematic annual review and assessment processes and moved the liaison implementation forward. The department also went through unifying exercises to define the mission, vision, and goals, as well as strategic priorities.

Other barriers were rooted in human nature. Among these were the usual overall reluctance to change; concerns about redefining of duties, spaces, practices, expectations, and professional identity; stress over changes in work environment; and difficulties in understanding new concepts, for example, “What is the Research Commons?” We used multifaceted approaches to deal with these issues. Most gratifying is our success in creating a transparent, consensus-building decision-making process that involves everyone in R&L. With a large and dispersed organization such as ours, it is not an easy task. We use standing committees with membership by representation, task forces, public forums, email lists, one-on-one conversations, visits to units, open-door policies, and other methods available to us. New initiatives are presented at R&L heads meetings, a group that consists of all managers in R&L. From there they are vetted by all units within R&L, then at the R&L forums, and finally by the administration. Our monthly R&L forums discuss issues that affect the day-to-day work of R&L librarians and encourage a free exchange of ideas. We provide a great deal of other internal and external training, which helps staff overcome barriers. Our annual review and assessment process for liaison librarians is perhaps one of the most effective ways by which we can help empower our staff to move forward by identifying concrete individual needs and specific ways they can achieve organizational goals.

STAGE 6: GENERATING SHORT-TERM WINS

Transitioning to a new liaison system and RC model is a process. As such, it has to be evolving and flexible, with an implication that deliverables happen gradually and with purpose. We are already in our fifth year of reorganization, and during this time we have seen a fair number of small and large victories.

In establishing the new liaison system, we started by developing the framework for annual reports, including guidelines and forms, which were based entirely on the liaison task force’s final report.¹² The format followed the report, but in the first year (2014), we asked liaisons to demonstrate accomplishments in three out of five categories of liaison

activities identified by the report. We decided to use this approach in order to ease staff into the process. In the next annual cycle (2015), we changed that to full compliance as we moved further in the implementation stages. Moreover, we layered the process for liaison assessment on the already existing cycle of annual merit review of the libraries with which people were very familiar. From the start, we wanted our assessment to be meaningful, manageable, and sustainable. It aimed to be broadly discussed with and approved by supervisors and connected to the libraries' and university's strategic goals, as well as to the libraries' policies and procedures for faculty promotion and tenure review. Thus these assessments were designed to be actionable, to let us know what impact individuals are having in their specific areas, to point to the areas of needed improvement and how to get there, and to highlight individual achievements. And at the same time, these annual assessments were to be flexible; responsive to changes in our environment, strategic priorities, and growth; in all to be a reflection of the individual and the organization. With broad support from our librarians, we have achieved what we aimed for, a functional annual assessment system that is helping us move forward. It is important to mention here that the newest librarians on our staff were the first and most vocal supporters of this system.

The development of the RC was slow until we identified a dynamic and proactive individual to lead the charge in 2014. She took upon herself to really understand the environment on campus outside the libraries. In the libraries, we often do not perceive the differences in which various campus communities and populations think of even most common concepts. For example, it was a real surprise to us to realize the meaning of "research" for different stakeholders. By learning and understanding the vocabulary and the true nature of needs of different units and staff on campus, she was able to establish a number of significant campus partnerships that provided the libraries with high-level campus visibility to a degree we had not experienced before. Integrated Research Resources on Campus, or IRRoC, is one of the earliest and most significant examples of what the RC can do for the University.¹³ A result of the partnership between the UMD's Division of Research, Division of Information Technology, and University Libraries, it provides a unified, central access point to connect the UMD research community with resources and services across campus. It was a huge win for the Libraries, both internally and externally, with strong praise from the campus administration.

One of the most difficult issues we faced is how subject librarians, who administratively do not directly report to RC, will fit into the overall concept and services of RC. To address this issue, we had conversations and training opportunities at the R&L forums, but we also have taken some proactive solutions in establishing the norms. A "Meet Your Subject Specialist" webpage, complete with the Google Scholar Profile for UMD librarians and Subject Specialist Directory, is administered by the RC, providing a sense of belonging to all subject librarians.¹⁴ Some of the well-regarded event series established before the RC by small groups of librarians, such as Speaking of Books... Conversations with Campus Authors, have been moved under the umbrella of the RC.¹⁵ Now they provide greater access and opportunities to all librarians to host faculty from their departments across the board. Finally, we had some wins in redefining the day to day work functions of librarians, including removing librarians from service desks; introducing student-centric learning, blended and flipped classroom teaching; and modernizing teaching spaces.

STAGE 7. CONSOLIDATING GAINS AND PRODUCING MORE CHANGE

The development of the framework for liaison librarians complete with functional annual assessments, changes in work responsibilities and expectations, and development of the RC have cumulatively added up to a major change in attitudes and perceptions. Today our RC is no longer just a concept and a virtual space. It occupies much improved space on the fourth floor of the main library, complete with a beautiful new formal reading room; large, flexible event/study space; a silent room; a reference alcove; GIS/GeoSpatial Lab and offices; areas for statistical consultations; a series of workshops for graduate students; and offices for our subject librarians and the Teaching and Learning unit. These spaces and services are in constant use and demand. Under the umbrella of the RC, we are in the process of developing themed “commons” based on the focus of a particular location, with Research Commons@McKeldin, our main library, as headquarters. We have already established the science-focused commons on the STEM side of campus, Research Commons@STEM, and are currently in the process of implementing the performing arts commons at our performing arts library, Research Commons@MSPAL. All the heads of our commons, including the learning commons, which is administratively outside of R&L, meet regularly to coordinate and develop new services and ideas. The overarching activities, like building partnerships with campus communities at large, are under the headquarters, but then each one of these locations offers specialized services. For example, Research Commons@STEM offers 3-D printing and skeleton models desired by the STEM students, and Research Commons@MSPAL provides a sewing machine and has experimented with space for interactive performances in the stacks.

Similar transformations have been happening to the liaison model as well. While previously only a few of our subject librarians could be considered embedded in their departments, now this is across the board. Besides our traditional duties, librarians are often providing nontraditional support, such as help with copyright issues and data research, and are full participants in the initiatives of their departments, organizing conferences and mounting exhibits and library-centered events in support and coordination with their faculty. Besides Speaking of Books, which is the only campus forum for faculty to present their latest works, the librarians through RC run a very successful and well-attended series, Interdisciplinary Dialogues, which brings the campus community together to discuss pressing issues in academia, including such topics as big data, immigration, and sex on campus.¹⁶ In effect, the UMD Libraries are becoming a recognized intellectual hub on campus.

We have done this by using the transparent decision-making model. We work on these initiatives step by step, listening to those directly involved, constantly improving and adjusting as we move forward, and that in turn keeps the momentum going. We empower librarians to be independent professionals, but we also nurture a highly collaborative learning environment. We celebrate successes by communicating them to the entire department, the libraries, and even to patrons. For example, our “Meet Your Subject Specialist” page boasts a Google Scholar profile for UMD Libraries and a Kudos section where we post individual praises received from students and faculty, although stripped of identifying information. The liaison annual assessment process

offers an important opportunity to celebrate individual progress, but also to handle complacency and other performance issues. We find that providing honest, specific, and direct feedback in combination with ways of improvement enables people to work through difficulties and reach positive outcomes.

III. Grounding Phase

STAGE 8: ANCHORING NEW APPROACHES IN THE CULTURE

The work that we have done thus far gives us great confidence that the changes we implemented have taken root. The key factors here are that we have applied the changes incrementally, building on already existing good practices and professionalism of our staff, soliciting a lot of feedback throughout the process, adjusting things as we progress, creating a cooperative work atmosphere and learning organization, and successfully communicating change and doing things in direct response to the needs of our campus community. We have created an environment flexible and nimble enough to adjust to new demands as they come. This has become our new normal in doing work.

Creating a new assessment program was not an easy undertaking. Communicating this process as incremental and developmental, rather than punitive, was key. The rollout of this program was constantly situated within the context of providing better services and with the notion that everyone has both areas of expertise and areas needing additional development. By actively addressing concerns and fears and by offering substantial professional development opportunities, the libraries have shown that we can go in new strategic directions in a positive manner and with less resistance. By going through this major organizational change, our librarians and staff have experienced how organizational learning occurs, and we have since seen numerous examples of how this has changed people's willingness to accept and even embrace change.

Analysis and Conclusions

We now are a different organization from the one of five years ago. Now the libraries are fully aware of how much we are intertwined with the constantly changing external environment and our need to adapt as changes occur. We are in a much stronger position to react and even affect some of these changes. As we first embarked on this mission, we were not initially considering Kotter's framework as our steps for the process of change. However, looking back at our journey, we realized how closely we have been following this framework in our daily work and progress. We conquered one step at a time, ensuring success and long-lasting change. We are building on the foundation we have already established, moving forward toward our goals of creating excellent services and an educational support system for our students and faculty, of which liaison services and Research Commons are an integral part.

Notes

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