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## Steering Change In Liaisonship: A Reverse Engineering Approach

By Eric Resnis and **Jennifer Natale**

### Abstract

The following recounts the process of redefining and rethinking a liaison librarian program at Miami University's main campus in Oxford, OH by utilizing a reverse engineering approach. This undertaking was precipitated in large part by our strategic planning process that high-lighted the need for additional assessment practices in order to provide evidence of impact. Miami is an R2 research university with a focus on undergraduate education. Approximately 17,000 undergraduate and 2,400 graduate students are enrolled at the Oxford campus. The system has 36 librarians with a little more than half serving in liaison roles. Our process is described as a means for most other institutions to reverse engineer their liaison models but our framing of liaison work may not work for institutions with dissimilar characteristics.

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# Steering Change in Liaisonship: A Reverse Engineering Approach

*Eric Resnis and Jennifer Natale\**

The following recounts the process of redefining and rethinking a liaison librarian program at Miami University's main campus in Oxford, OH by utilizing a reverse engineering approach. This undertaking was precipitated in large part by our strategic planning process that highlighted the need for additional assessment practices in order to provide evidence of impact. Miami is an R2 research university with a focus on undergraduate education. Approximately 17,000 undergraduate and 2,400 graduate students are enrolled at the Oxford campus. The system has 36 librarians with a little more than half serving in liaison roles. Our process is described as a means for most other institutions to reverse engineer their liaison models but our framing of liaison work may not work for institutions with dissimilar characteristics.

## Introduction and Premise

Technology has done a great deal to change the nature of librarianship.<sup>1</sup> In addition to support for technology, positions have been sculpted to take advantage of technology as it supports faculty, staff, and students. Decades ago, most liaison librarian positions were fairly uniform. Now in addition to traditional liaison librarians (where work focuses on collection development, instruction, and reference for a specific department or entity), positions such as Scholarly Communications Librarian, Digital Humanities Librarian, and countless others build on technology, but muddle the role of the liaison librarian.

Technological innovations can also be identified as a primary factor increasing the ambiguity of our liaison program. As new opportunities with technology and technological engagement presented themselves, Miami University Libraries did what many libraries did: added new roles and positions. Software support became a responsibility of many liaison librarians, especially if it was appropriate for a certain department (i.e. Adobe Photoshop for graphic design students). With an emphasis on support for new technologies and roles, thoughts on the holistic role of liaisonship were deferred to a later time.

While still functional, the result of many additional roles was a liaison program with symptoms of dysfunction. Before we discuss the symptoms, it will be helpful to define some terms that will be discussed in the following paragraphs:

**Liaison:** A librarian who is assigned primary engagement responsibility to specific university department(s), program(s), and/or unit(s).

**Subject-Specialist:** A librarian with additional knowledge in a specific cognate area, who is assigned liaison duties in-part based on that subject knowledge.

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**Functional Liaison:** A librarian who oversees a certain function of the Libraries' mission such as scholarly communication, digital scholarship, or student engagement. This involves interaction with a wide range of constituents, and often necessitates collaboration with subject-specialists.

The first symptom of dysfunction was confusion over roles of subject-specialists and functional liaisons. Over the years, functional liaisons had been added in the areas of scholarly communication, digital scholarship, international student programs, athletics, honors program, and data/geospatial services. As alluded to in the definition, function liaisons oversee a certain function for the **entire campus**. Subject-specialist librarians were still expected to interact with their departments regarding these functional areas and this created confusion regarding responsibilities. Questions surfaced as to when work should be collaborative or deferred to the functional liaison.

Providing a departmental-based liaison approach for decades led to the second symptom of dysfunction: liaison activities that were siloed and scattered. This is not to say that liaisons did not collaborate. As interdisciplinary programs and majors were created, liaisons from different areas did work together on collection development and other projects that crossed discipline lines. For the most part, however, liaison activities were very specific to the librarian, and philosophies could vary greatly for departments within the same academic division. Furthermore, departments were still seen by some as coveted property that could be bartered for something 'better'.

Siloed and scattered activities, with a lack of standardization, led to different priorities for different librarians, the next symptom of dysfunction. Those inclined to focus on a certain area such as collection management could do that, and choose not to focus on other areas with the same vigor. Engagement might mean one e-mail a year for certain departments, while others provided weekly office hours in their departments. This resulted in an unequal service quality and offerings between departments and units. Furthermore, with librarians serving so many different roles, accountability became difficult as it was easy for librarians to justify that they were stretched too thin or for those lacking initiative to go unnoticed.

When thinking about assessing the liaison program, it was soon apparent that this was an impossible task given the current situation. When liaison librarians were asked what it meant to be a liaison librarian (this conversation is described in full in the next section), the answers were extremely varied. Any possible assessment scheme would advantage some and disadvantage others simply because of differing priorities and styles. Some degree of standardization and an overall vision for the program was needed before any meaningful assessment could occur.

## Liaison Engagement Process

From the onset, a decision was made to have a small team that could easily gather information, synthesize, and then share for feedback. The team consisted of three members, each providing differing and representative views of liaisonship. The leader of the group was the Organizational Effectiveness Coordinator, who oversees assessment for the system and had also served as a subject-specialist (engineering) and a functional liaison (honors program). The other two team members included a subject-specialist (psychology and speech pathology) and a functional liaison (athletics and global initiatives). The project began with hesitant buy-in from administrative leadership, but with some concern at the scope of the project. True buy-in did not come until the results from the initial workshops were shared with them, bringing home the dysfunctional symptoms that were described earlier.

Our team chose to embark on a reverse engineering approach with the goal of dissecting our current liaison practices and beliefs back to their very core. Ultimately, our endpoint was productive engagement with users. As

mentioned previously, there were numerous signs of dysfunction within the liaison program, including a lack of consensus regarding the meaning and the purpose of liaisons. We decided to use the workshops as the impetus for further exploring the symptoms of dysfunction, dissect our current liaison practices and beliefs back to their very core, and determine how we could all work together toward quality user engagement. We anticipated that this process would allow us to retain those aspects of our model that were working well, ensure everyone was on the same page by highlighting shared values, and allowing new ideas and opportunities a place in the future framework. The decision was made to plan three workshops with all liaison librarians.

We established a unifying goal for the process: A refined model of liaisonship (that includes quality indicators) in which librarians work together toward University-based outreach goals. We also outlined two primary objectives that would guide the discussions with liaisons. The first was to discuss/determine what liaisonship entails and the second was to create consensus on effective or quality liaisonship.

The first workshop began with clarification of the goal for the process as well as the objectives. It is important to note that some liaisons were apprehensive concerning a possible underlying agenda of the workshops. Establishing norms/ground rules as well as clarifying the purpose of the process helped to dispel any rumors or concerns. The initial workshop then asked liaisons to reflect on three questions:

- Why are we liaisons?
- What do we do as liaisons?
- To whom?

Everyone was given sticky notes to write a single idea per note and then post them under the appropriate question. As facilitators, we began to group similar items together which highlighted items of consensus as well as unique ideas. To wrap up the reflection, the group then engaged in a discussion about how the responses to the three questions related as well as asking, Is *what* we say we are doing satisfying the *why*? Finally, the group was asked to share best practices for a liaison which set the stage for the next workshop. As facilitators, we documented all the posted ideas into a spreadsheet for future reference and shared with everyone prior to the next meeting. Reflection on our discussion was strongly encouraged, taking into account that some individuals might need more time to reflect and process the conversation.

The second workshop began with a summary of what we discussed in the first workshop, a reminder of our purpose of meeting library objectives, and the need to create a framework for what quality liaisonship is. In particular, we asked the group to share their thoughts on the trends they saw from the previous brainstorming activity and discussion. The overwhelming trend was that of communication and generally focused on one-way communication to an academic department. As facilitators, we guided the group in a reflection of the trends as it also related to functional liaisons, not just liaisons to academic departments. Our goal was to begin to define how we could work together across discipline/department lines as well as non-department/discipline entities.

The group activity for the workshop was to imagine a new librarian who would be joining our team of liaisons. Individuals were asked to brainstorm three best practices they would share as a way of explaining liaisonship at our library. The group was encouraged to generate new categories or ideas that weren't already on the list and that crossed the line between subject specialists and functional liaisons. As facilitators, we compiled a list of best practices that fell into four main categories of ombudsman/advocate, expertise, create relationships, and dissemination/communication.

The third workshop provided research the facilitators had gathered on other university library liaison models through published articles and websites. We also shared recent work from ARL on transforming liaisonship.<sup>2</sup> Our research highlighted a variety of models and strategies based on particular climates and needs. A number of university libraries including Duke University<sup>3</sup> and Dartmouth College<sup>4</sup> employ engagement-centered models

that outline responsibilities, as well as best practices for liaisons. Other university libraries have developed strategies to meet their needs such as a facilitator model,<sup>5</sup> a consultant model,<sup>6</sup> and an embedded librarian model.<sup>7</sup> Regardless of various language, the models highlighted common categories of liaison responsibilities including collections & resources, teaching & learning, research services, scholarly communication, digital tools, engagement, and communication. As facilitators, we led a discussion about various models in the context of our unique circumstances to better gauge the right fit for our library system. A conversation of this kind helped the group to evaluate what liaison activities are valued, in part by examining where time and energy is spent. Additional themes that emerged were the challenge of conceptualizing outreach as well as establishing expectations of working with other liaisons. The discussion about outreach was intended to move our best practices from one way communication to a more collaborative form of outreach. This collaboration also applied to the liaison librarians as we discussed how to work across subject specialties and functional areas. There were four pervasive themes that emerged from the workshop discussions:

- There was no consensus regarding liaisonship duties and expectations.
- Considerable uncertainty existed regarding quality liaisonship.
- There was confusion regarding “outreach” and other duties as related to liaisonship.
- Execution of liaisonship duties varied greatly between departments.

## Framework Development

As a result of the research completed, the workshops, and the feedback from liaisons, the facilitators created a Liaison Librarian Framework for Miami University Libraries. The aim of the document was to provide clearer expectations for liaisonship and straightforward mechanisms for the evaluation of an individual’s liaisonship duties. The framework would then also provide an opportunity to assess the overall quality of the liaison program and hopefully promote increased collaboration between all liaisons, whether subject-specialist or functional liaisons. The framework consisted of core liaison elements, highly-collaborative liaison elements, and assessment information.

Based on research of other university library liaison programs and internal workshop discussions and feedback, four core liaison elements were outlined in the new framework. Core liaison elements are job responsibilities that are common to nearly all librarians who provide services to a department, program, or office. Each core element had an overarching goal and lists of basic expectations and best practices that liaisons could refer to. As was evident from our discussions, engagement emerged as a fundamental element and often serves as the basis for all other liaison work. This conclusion matched those by other libraries that had also reevaluated their liaison models and processes.<sup>8</sup> The four core liaison elements and goals are:

**Engagement.** Goal: Serve as primary liaison to an area’s faculty, staff, and students; take initiative to identify, meet, and facilitate ongoing communication about their resource needs and service expectations.

**Teaching and Learning.** Goal: Design and implement a strategic and holistic instructional program that utilizes pedagogical methods appropriate to the assigned constituent group(s).

**Collection Development and Management.** Goal: To collect and manage collections that support research and instruction in assigned areas.

**Research Support.** Goal: To provide quality (both specialized and general) reference and research consultation services to library constituents.

As an example, a basic expectation in the Engagement element is to actively engage with faculty, staff, and students in assigned areas in order to develop strong working relationships and a best practice is to provide frequent multi-modal communication.

Four highly-collaborative liaison elements were outlined to address specific areas where close and sustained collaboration is needed between subject-specialists and functional liaisons. As with the core elements, each has an overarching goal as well as lists of basic expectations and best practices. The four highly-collaborative liaison elements and goals are:

**Scholarly Communication and Open Content.** Goal: Educate and inform administrators, faculty, students, and staff on issues of scholarly communication, including open access, Scholarly Commons, and Open Educational Resources (OER).

**Digital Scholarship and Data Services.** Goal: Educate and assist faculty and students on issues of digital scholarship and data literacy.

**Student and Co-Curricular Services.** Goal: Incorporate library services and collections into the wide-breadth of student support services such as student affairs, athletics, enrollment management & student success, and global initiatives.

**Special Collections and Archives.** Goal: Educate and engage faculty and students on the unique, rare, and specialized materials that may supplement their research needs.

An example of a basic expectation in Scholarly Communication and Open Content is to demonstrate competency on broad issues of scholarly communication and copyright and a best practice would be to invite the scholarly communication liaison to faculty and graduate student conversations on scholarly communication issues.

An implementation plan was proposed to administration and suggested coordination of liaisonship be a shared managerial responsibility of key leaders in our organization. Implementation also suggested clarification of duties and expectations of functional librarians, in particular, in scholarly communication and open content and student and co-curricular services. These were growth areas that had been added onto existing responsibilities due to needs within our university and library system. Finally, a suggestion was made to reevaluate the document in approximately two years as the organization and needs changed.

## Assessment of Liaison Activities

Assessment of a liaison system can be quite tricky. Any assessment in place should be both robust and meaningful, and provide data that can be acted upon. In response to concerns recorded during the liaison workshops, we also wanted to ensure that the assessment scheme would provide opportunities for innovation and creativity.

A two-tiered approach was chosen so that liaisons could be assessed as a program and as individuals. One tier looks at the liaison program as a whole, based on a scheme devised by Miller.<sup>9</sup> Program assessment perceptions are garnered from a survey sample (20%) of faculty, staff, and administrative staff across campus. Faculty/staff are asked to identify their liaison, describe interactions during the past year, and to rate their performance. Finally, faculty/staff are asked to indicate how much interaction they would prefer, and how that interaction can be more meaningful. Overall results for this tier are openly reported in aggregate, but individual results are shared with each liaison and their supervisor.

Gathering the perceptions of faculty and staff regarding their liaisons was important for several reasons. Faculty have not had a specific avenue in which to provide this information. Liaison comments are often included with results from implementations of LibQUAL, but most unflattering comments are too general to identify a specific liaison. Note that student perceptions are not part of this scheme, but they may be added in future implementations.

The second tier of assessment is performance ratings based on the basic expectations that are outlined in the framework. This assessment system was designed to work seamlessly with reporting requirements for tenure and promotion. Librarians are required to report activities annually in three categories: primary professional

responsibilities (PPR—librarianship), service, and scholarship. As librarians report on their liaison activities in the PPR section, they include evidence that their work met and/or exceeded the basic expectations of the liaison framework. Reporting in this manner not only further standardizes the process for reporting librarian activities, it also helps the librarian to better understand where to focus efforts, and provides an easier and less subjective manner for supervisors to rate performance.

Assessment is via a rubric with three different gradations of quality: Base Level, Developing, and Accomplished. The idea is that as a liaison develops relationships with departments and builds a reputation at the institution and in the profession, the quality of liaison services will evolve from base level to that of an accomplished liaison. Gradations of quality are loosely tied to librarian rank. For instance, it would be expected for a librarian seeking promotion to associate librarian to be rated as “developing” for most items (but not ALL items). In essence, this rubric serves as an important tool for determining whether a librarian is progressing toward promotion, in conjunction with other tools that demonstrate progress in high-quality work and increasing reputation in the profession.

A distinguishing facet of this rubric is that it involves the proactivity of a liaison librarian in addition to accomplishments and successes. The base-level of performance involves activity of an entirely reactive nature, where “developing” involves the liaison reaching out to constituents to create effective relationships, and “accomplished” requires the liaison to be fully embedded in the department co-creating services that benefit both the department and the libraries. For instance, assessment of a collection management expectation might look like this:

**Basic Expectation:** Utilize collection statistics to manage and maintain collections that are relevant to library space requirements.

**Base-Level Performance:** Management only occurs via required initiatives (zero growth, planned weeding).

**Developing Performance:** Utilize statistics regularly to maintain collections regardless of required initiatives.

**Accomplished Performance:** Utilizes statistics from multiple sources (consortium, cooperative development) to make decisions about collection management at a more holistic level.

Including proactivity as a key facet of the rubric assists in many ways. Without simply focusing on the number of instruction sections, number of books bought, or number of hits to the department LibGuide, liaisons are encouraged to provide evidence of their *impact* to the department. For instance, while the number of instruction sessions might have decreased, involvement with the department curriculum committee might have resulted in much more impactful instruction. The rubric also provides liaisons with flexibility in providing services to “difficult” departments that may not be receptive to library services or collaborations. Instead of using difficult departments as an excuse, the focus is on employing different methods to engage with department faculty.

## Conclusion

Unfortunately, liaison models are not a “one fits all” solution. It is not likely that a model employed by another institution will be a perfect fit for yours. Friesinger and Herwig describe reverse engineering as a process where you open, dissect, and rebuild.<sup>10</sup> We suggest that this process is a beneficial way to look critically at your own liaison model and make any necessary alterations to continue to meet the needs of your constituents. Reverse engineering your liaison model may result in drastic changes or only minor alterations depending on what you find under the hood. Opportunities for liaisons to discuss and reflect on current practices and future trends in service help to build an environment of collaboration and investment. In addition, this process will better position you to measure the impact of your services through assessment.

## Notes

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