Liaison and Functional Team Structure Review Task Force, 2017-2018 Final Report, May, 2018

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Executive summary

The Liaison Team Structure Review Task Force was convened in the 2017 fall semester, with the purpose of examining the liaison functional and subject team structure implemented in 2013-14 to determine how well it is functioning and what changes should be made in response to evolving needs and University Libraries' strategic priorities.

The task force reviewed identified weaknesses and challenges, including the disconnect between evolving liaison roles and the lack of opportunities for discussion and training regarding those evolving roles, the perceived excessive focus on collections and reference desk staffing, the lack of a central liaison coordinator, and workload issues related to collections work.

New liaison opportunities were surfaced through a survey and through discussions with liaison team members. These included: support for online classes, teaching and co-teaching opportunities, community outreach, growth in Zotero support and needs, grants, accessibility services, Open Educational Resources, GIS, scholarly communications, identification of learning materials, and embedded librarianship.

Based on surveys, liaison discussions, and team discussions, the task force recommends:
1. Implement methods and increase opportunities for communication, information-sharing, brainstorming, and strategic planning among liaisons and liaison team members.
   a. Hold annual liaison strategic planning retreats.
   b. Create a central location to share documentation.
2. Create structures and documentation to support team leaders.
   a. Create documentation to address team leader guidelines and best practices.
   b. Create opportunities for information-sharing and support among team leaders.
3. Retire using liaisons at the Information Desk, including for weekend work and backups. Pilot new staffing models.
4. Make recommendations on liaison workload expectations and roles.
5. Evaluate optimal team sizes and formats.
6. Establish expectations for regular, ongoing team workshops, and hold team leaders accountable for those expectations.

7. Update the liaison roles document to better match current campus needs and changes based on the task force's recommendations
8. Make recommendations on space needs of department in relation to desired service model.

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1. Origins of UNCG University Libraries' liaison and functional team model

In spring of 2012, Dean Bazirijan commissioned the *Liaison Collections Responsibilities Task Force*. The task force description state that "the enhanced responsibilities of our liaisons have created some very real issues regarding the amount of time that can be spent on collection development." The charge of the task force included:

1. Define the collection development, instruction, outreach, and newly defined and enhanced responsibilities of our liaisons.
2. Define the ways that collection development has changed over the years.
3. Benchmark with other libraries to see how they are handling the complexities of liaison responsibilities in new, creative and innovative ways.
4. Recommend an organizational model for collection development and other liaison responsibilities that will allow us to give the proper attention to both areas in a sleek and efficient way. More than one organizational model should be recommended providing alternatives to choose from.

While collections work dominates that charge, many liaisons had also grown frustrated with the increasing disconnect between evolving liaison roles (for example, an emphasis on proactive engagement with teaching and research support) and the lack of opportunities for discussion and training regarding those evolving roles. Most meetings of the Reference & Instructional Services department continued to focus on collections work and reference desk staffing and policies. These issues were also considered by the task force.

A July 2012 retreat of the Administrative Advisory Group modified the goals of our liaison program: liaisons would spend much less time providing collection development and reference services, while focusing more on providing proactive support of research across campus. The task force was asked to incorporate these revised liaison goals into its work, expanding the scope of its final recommendations.

At this time, liaisons were based in a number of UL departments (including Music, missing from the below graphic). Liaisons met via the large Collection Management Committee. There was no central liaison coordinator. Some liaisons had other full-time roles in the UL; their liaison role was primarily handling collections questions from their academic departments.
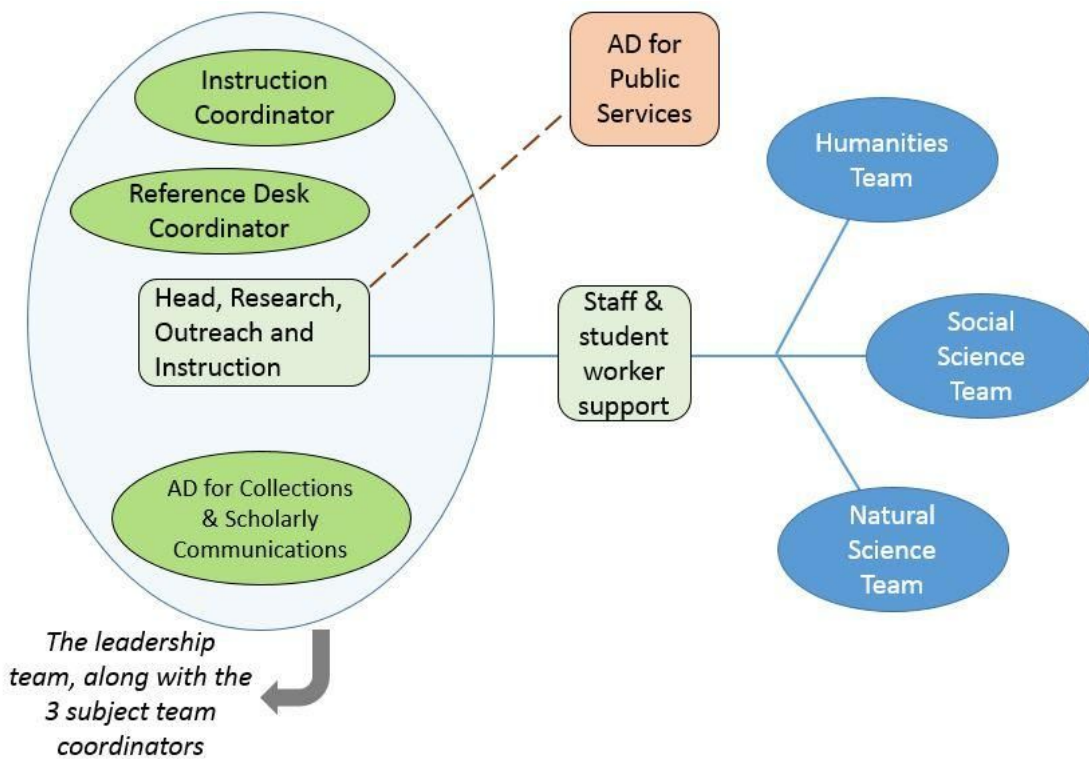
Liaison organization, circa 2012
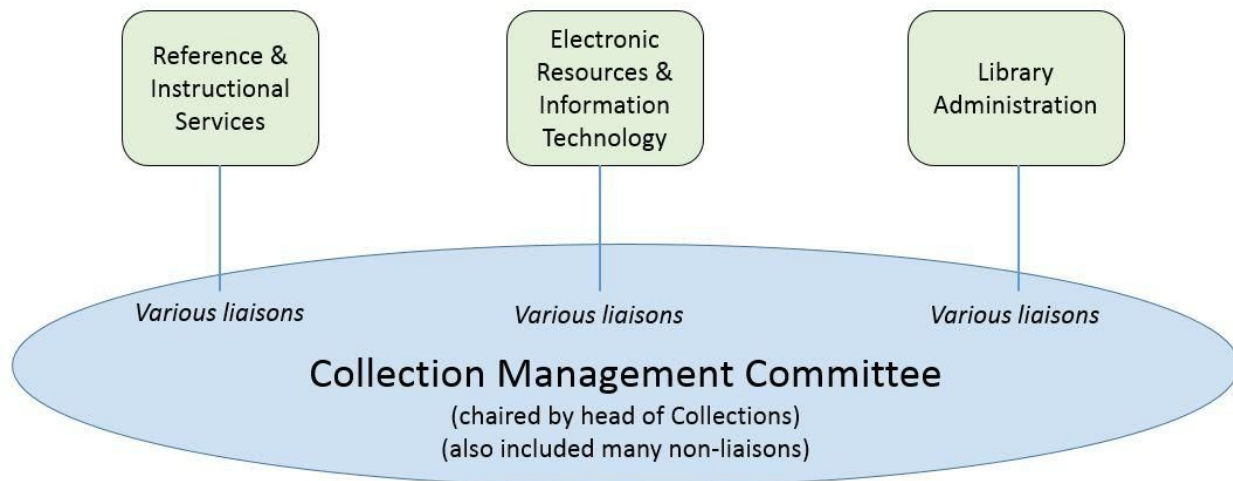
Through the spring and summer of 2012, the task force organized many discussion and brainstorming sessions (including once with WFU liaisons), examined the (scant) literature on best practices in liaison organization and leadership, and interviewed liaison coordinators from the small number of libraries that had recently reorganized their liaisons away from the decentralized, collections-centered model. The task force then presented several new organization models to the liaisons and other stakeholders for final feedback. Finally, the task force submitted its report to the Dean in August 2012.

In December 2012, Dean Bazirijan formed two implementation task forces. The *Collections Implementation Team* had the goals of "Define the role of collections as it relates to other responsibilities of library liaisons; streamline collections decisions prior to sending projects/requests to library liaisons; reduce the involvement of liaisons in collection development activities, thereby freeing them up to spend more time on instruction, outreach and direct faculty support."

The goal of the *Liaison Implementation Team* was to "strengthen the roles of liaisons in the areas of teaching, faculty support and consulting and outreach and reduce the collections responsibilities to the extent possible." The charge of the liaison team included implementing these two models of liaison subject teams and cross-departmental functional teams:

Liaison teams and leadership

Instruction Coordinator

Reference Desk Coordinator

Head, Research, Outreach and Instruction

AD for Collections & Scholarly Communications

AD for Public Services

Staff & student worker support

Humanities Team

Social Science Team

Natural Science Team

The leadership team, along with the 3 subject team coordinators

Functional teams:

Composed of liaisons from each subject team plus other librarians & staff

Collections Team

Scholarly Communications Team

Instruction Team

Reference Desk Team

Social Science Team

Humanities Team

Natural Science Team
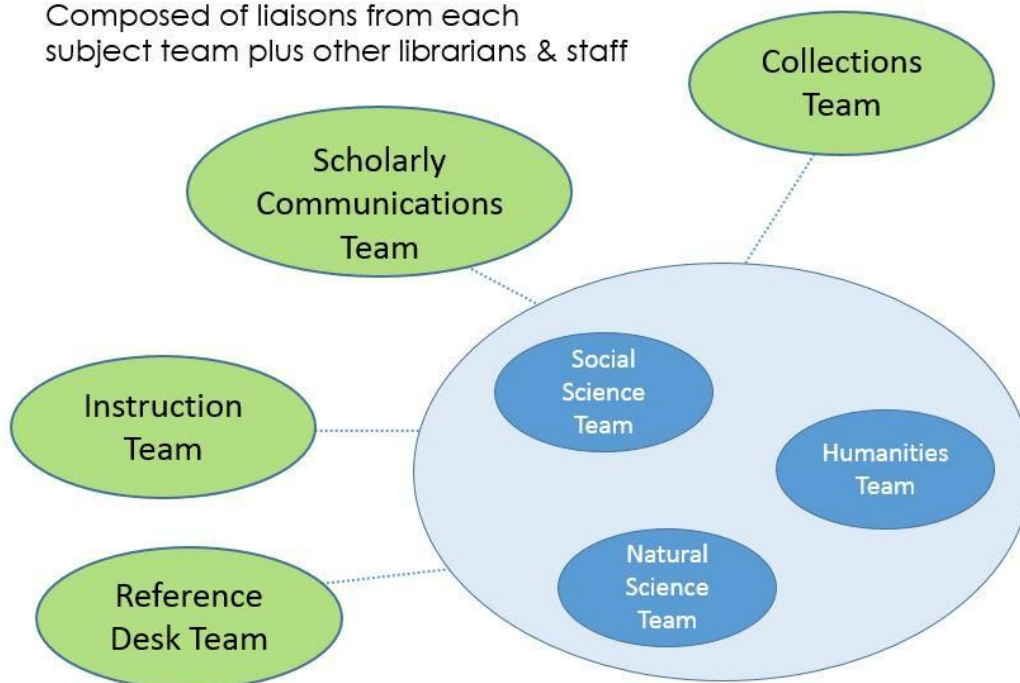
The *Liaison Implementation Team* created a two-year timeline (2013-14) to implement these subject and functional teams. As part of the process, members of the Special Collections and University Archives and the Digital Media Commons become team members. The Reference and Instructional Services department was rebranded as Research, Outreach, and Instruction. The ROI department head become our liaison coordinator, who oversaw the teams and organized monthly all-liaison discussions. Some liaisons whose main role was collections work retired their liaison roles. The UL created a Science Librarian position for the first time; that liaison joined our existing Health Sciences Librarian and a SCUA member to form the Science Team.

Liaisons rewrote the UL's official description of liaison roles. Teams began providing peer-training (often inviting other teams to participate). In general, meetings seemed more useful and more interesting to liaisons. However, communication across teams and through the UL proved challenging.

While collections work is now much less demanding on liaisons' time, liaisons still struggle with workload issues. UNCG continues to dramatically expand student enrollment and the number of faculty. Some liaisons have experienced a large growth in their target population (one liaison is now responsible for over 4,000 students). However, the only new subject liaison position created in the UL since 1998 has been the Science Librarian position. Online education, scholarly communication advocacy, and data management have joined instruction, collections, and more traditional research support as liaison roles. The UL has hired more functional liaisons to serve these roles, including two new positions planned for 2018-19. However, functional liaisons don't necessary result in more manageable workloads for subject liaisons.

In Fall 2017, the *Liaison Team Structure Review Task Force* was formed to examine and reassess the 2013-14 changes and their intended outcomes.

2. Charge: Liaison Team Structure Review Task Force: 2017-2018

Goal: Examine the liaison functional and subject team structure implemented in 2013-14 to determine how well it is functioning and what changes should be made in response to evolving needs and University Libraries' strategic priorities.

Objectives:
1. Review weaknesses identified in our earlier (pre liaison team) organizational model to determine what challenges still exist.
2. Identify new liaison opportunities based on Libraries' priorities and campus needs.
3. Assess and review current team structure and team activities. How cross communication can be improved
4. Make recommendations on the team structure to address challenges and new opportunities, and determine if alternative structures are needed

3. Methods

Taking into account that our liaisons have different communication preferences, and that we wanted to have the widest net to collect feedback, the task force provided multiple input types and opportunities.

1. A survey was sent to all staff who serve on liaison or functional teams. This [survey instrument](#) asked participants to break up their work responsibilities into percentages, asked them to identify priorities, what they wished they could spend more time doing, what duties they'd like to relinquish, ideas for saving time, and several questions assessing views on the current team structure.
2. Members of the task force scheduled initial meeting with team leaders to discuss charge of group, asked each team leader to meet with their teams to begin conversation and report on activities in which teams had engaged, including workshops and major projects.
3. Members of the task force met with all subject and functional teams to respond in a group environment.
4. Members of the task force held two open sessions for anyone who served on a functional or subject team.
5. Liaison Team Structure Review Task Force reviewed all feedback, created document with list of recommendations, and invited Team Leaders to convene once more to react to feedback.
6. Liaison Team Structure Review Task Force reconvened, reviewed all feedback, revised original list of recommendations for report.

4. Results and Recommendations

Charge #1: Review weaknesses identified in our earlier (pre liaison team) organizational model to determine what challenges still exist.

- Increasing disconnect between evolving liaison roles (for example, an emphasis on proactive engagement with teaching and research support) and the lack of opportunities for discussion and training regarding those evolving roles.
- Perceived excessive focus in meetings on collections work and reference desk staffing and policies with little time to discuss information literacy and other evolving roles
- No central liaison coordinator; many liaisons strained with full-time roles in other departments.
- Collections work created workload issues; little time for liaisons to explore new and evolving roles. Perceived too much time spent on book selection and de-selection that could be done more efficiently through other methods.

Charge #2: Identify new liaison opportunities based on Libraries' priorities and campus needs
These areas were drawn from the liaison survey and from liaison team member discussions on 1/4/2018.

- Support for online classes
  - Creating tools for online classes
  - Providing / attending training sessions
- Teaching and co-teaching
  - Expanding involvement in LIS 200, with no course release for instructors.
  - Increasing teaching workload taken on by librarians for LIS courses, LIS 200, no compensation for, demand for such teaching expected to grow. How handle the time commitment, maintaining all other roles/responsibilities/scholarly requirements to get tenured?
- Community outreach
  - Outreach includes FYE, UTLC, Chance, Expo, OARs, Libraries' student training (worked w/other units on campus)
  - Middle College support
- Increasing involvement with Zotero support, in the form of beginning and intermediate workshops, and increased consultations.
- Working with grants
- Need for accessibility services
- Open Educational Resources
  - Creating and finding
  - Basic explaining how all this works
- New GIS and Scholarly Communications positions also expected to affect/expand departmental demands

- Working more with finding learning materials (such as OER materials) for courses.
- Campus growth
  - Some departments have grown considerably e.g. Nursing, Bryan School.
  - Many more faculty and students than in 2013:
    - Spring 2013, there were 12,538.5 FTE; in Spring, 2018, 14,399 FTE *
    - In 2013/2014, there were 988 faculty members; 1,056 in 2016/2017*
  - Many new academic programs and types of degrees since 2013
- Embedding:
  - a question of definition. What can this include?
  - How to count/record such work
  - ROI considerations (or concerns)

*https://ire.uncg.edu/factbook/pdf/

Charge #3: Assess and review current team structure and team activities. How can cross communication be improved?

Current team structure:
1. Functional Teams
   a. Collection Management Team
   b. Desk Team
   c. Information Literacy Team
   d. Scholarly Communications Team
2. Subject Teams
   a. Humanities Team
   b. Sciences Team
   c. Social Sciences Team

Team communication is addressed in the recommendations below.

Charge #4: Make recommendations on the team structure to address challenges and new opportunities, and determine if alternative structures are needed.

Recommendations:

1. **Implement methods and increase opportunities for communication, information-sharing, brainstorming, and strategic planning among liaisons and liaison team members.**
   a. **Hold annual liaison strategic planning retreats.**
      There have been some liaison retreats in the past. Implementing the retreat as an annual event for strategic planning would give team members the opportunity to connect, share information, and plan as a group.
   b. **Create a central location to share documentation.**
      Liaison team discussion sessions and the Liaison Structure survey both surfaced requests for more information-sharing among liaison team members. A specific

suggestion that was brought forward was the creation of a folder where team members could share documentation, workflows, team information, and more. This suggestion could easily be implemented with Google Drive. The shared folder could also be linked from Behind The Stacks.

2. **Create structures and documentation to support team leaders.**
   a. **Create documentation to address team leader guidelines and best practices**
      Survey and discussion respondents indicated desire for team leader duties to be spelled out in shared documentation. This documentation should address any differences between the expectations for leaders of subject and functional teams.
   b. **Create opportunities for information-sharing and support among team leaders.**
      Implement regular meetings for team leaders (possibly annually, or twice-annually), with the head of ROI and the AD for Public Services serving as coordinators. A summer meeting could address team membership and plans for the coming academic year. A winter meeting could serve as an opportunity to for team leaders to check in.

3. **Retire using liaisons at the Information Desk, including for weekend work and backups. Pilot new staffing models.**
   Reference service is not one of the official liaison roles, and there was a mandate from Library Administration in 2012-13 to reduce liaison hours at the reference desk. Yet liaison time commitments for reference services and backup have been increasing (including the return of required weekend hours). Meanwhile, liaisons are asking for more time for writing and their growing liaison roles. Two options came forward in discussion on this topic:
   a. **Reference desk triage model**
      This model has already been implemented with student workers at the Access Services desks and the DMC service desk. Use undergraduate student worker to handle directional and guest-printing questions (the bulk of desk activity), with well-trained interns or our excellent staff colleagues handling the less frequent research questions.
   b. **Combined service desk model**
      Examine the possibility of combining the Access Services and Information Desks on the first floor, especially as the Libraries embark on the Master Space Planning.

4. **Make recommendations on liaison workload expectations and roles.**
   A recurring theme in the Liaison Structure Survey responses was workload concerns, with the acknowledgement that roles and responsibilities continue to increase and that some liaisons are struggling with balance and prioritization.
   Benchmarking with other libraries to compare liaison workloads and the average numbers of students and faculty per liaison might be helpful in determining reasonable campus

coverage by liaisons and workloads.

5. **Evaluate optimal team sizes and formats.**
    a. **Team format**
       During the course of the task force's work, there were several discussions about the differing nature of subject versus functional teams, with the functional teams operating more as working groups and having task-driven missions that require collaborative efforts but also focus in areas associated with a single person's job. Because of these strong associations between job duties and functional team mission, the regular rotation of team leadership may not be a desired feature of the team structure.
       While the activities of the functional teams are critical to the work of the Libraries, their inclusion in the current liaison structure may not be beneficial to the institution. Because of the significant differences between the subject and functional teams in both form and goals, trying to apply the same standards to both types may stifle desirable development of the other. As the evaluation of the liaison structure moves forward, the task force recommends intentional consideration of the differences between subject and functional teams.
    b. **Team size**
       Survey and discussion respondents expressed the desire to keep teams responsive and nimble, and also indicated that some teams are too big to function effectively. The current Humanities Team was mentioned as one example. These comments were illustrated when task force co-chairs made every effort to solicit and provide opportunities for team members to share feedback electronically and in person throughout the course of the task force's work, but it was not possible to schedule a meeting that included all members of the Humanities Team during this window. The task force recommends the creation of an implementation group to evaluate team size and consider how large teams could be split into more functional units.
       Some points of note in relation to potential team splitting:
          i. Contributions of SCUA members are valuable. Subject teams (and functional, where applicable) should continue to have at least one SCUA member.
          ii. Team membership should be responsive and open to shifts if and when campus subject area focuses shift.

6. **Establish expectations for regular, ongoing team workshops, and hold team leaders accountable for those expectations.**
   The task force received survey and discussion feedback that indicated liaisons strongly affirm the value of the team-sponsored continuing education workshops. Respondents requested a combined list of workshop topics so sessions could potentially be repeated or updated as needed. Respondents also requested a mechanism for suggesting workshop topics.
   There was also a suggestion to consider expanding workshop programming to address

more external audiences.

7. **Update the liaison roles document to better match current campus needs and changes based on the task force's recommendations.**
   Current roles documents:
   http://library.uncg.edu/info/library_liaison_responsibilities.aspx
   http://library.uncg.edu/info/liaison_department_responsibilities.aspx
   Campus needs and liaison opportunities have shifted and expanded since these documents were implemented in 2013, and the existing liaison responsibilities may not accurately reflect the current landscape.

8. **Make recommendations on space needs of department in relation to desired service model.**
   While the issue of departmental and Libraries' space is outside the charged purview of this committee, space is intrinsically connected to liaison work. And as the Libraries are involved in a significant space planning initiative, it seems not only appropriate but critical to consider space in relation to liaison work.
   One recommendation that came forward was the creation of a multi-use consultation room for meeting with faculty, students, colleagues, and small groups. This type of space is common in Digital Scholarship facilities across the country and around the world, and could be utilized by Libraries' personnel in many departments.

Appendix A: Notes from team meetings

Teams were asked to respond to the following questions:
1. What workshops and other activities has your team hosted since the start of the team structure? (These could be internal or external-facing activities.)
2. What aspects of your team structure and activities are working well?
3. What gaps do you see in terms of your team, or in the larger team structure?
4. Does your team have recommendations on what could be done better or differently in relation to the team structure?

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Question 1: What workshops and other activities has your team hosted since the start of the team structure? (These could be internal or external-facing activities.)

These are non-exhaustive lists that highlight some of the workshops and other activities that liaison teams have led. Teams may wish to revisit or update some of these programs to address current needs.

Collection Management Team:
- Budget cuts for 2014/15
- Communication strategy: internal library meetings for weeding, reporting out, feedback from liaisons
- Weeding project - pilot on 6th, 5th, working on 4, 3, 2

Instruction Team:
- Final product assessment workshop
- Teaching Tuesdays
- Teaching sandbox
- Classroom assessment techniques

Scholarly Communications Team:
- Lowering the cost of textbooks workshops - Feb 20th and 21st 2017
- Open Educational Resources - March 23, 2016
- Open Access Policy Forum - Feb. 17, 2016
- Author rights forum - October 2015
- Open Educational Resources - October 23, 2014
- Various ASERL webinars on Scholarly Communications issues

Science Team:
Internal workshops and similar programming:
- SciFinder database workshop - January 2014
- PubMed database workshop - May 2014

- Liaison coffee talk on consumer health information services - Dec 2014
- Open Science Team meeting on NC LIVE databases - March 2015
- Tour of patient simulation lab in School of Nursing - April 2015
- Science team workshop (Scopus database + answering common health science questions) - April 2016
- Science team coffee talk - Adult Learners and Transfer Students - June 2016
- Orientation to Systematic Reviews - September 2016
- Demo of "Good Medicine: Greensboro's Hospitals and Healers" (internal within Science Team meeting) - May 2017

Other team activities:
- Curriculum mapping/environmental scan for library instruction - 2013-2014
- Criteria for science print journal deselection - March 2014
- Survey of STEM interests/needs among liaison librarians - Nov - Dec 2015
- Review of impending science-related NC LIVE e-resource changes - Sept 2017

Social Science Team:
- 11/18/14: Scopus Workshop for the Social Sciences Team
- 5/22/17: Altmetrics workshop
- 9/25/17: Nexis Uni training (from company; co-sponsored with Science Team)
- 10/5/17: APA Style Central webinar

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Question 2: What aspects of your team structure and activities are working well?

Collection Management Team:
- We get a lot of work done
- Not too big
- Just right number of members
- Good representation across the library
- The people that have the knowledge and expertise

Instruction Team:
- Our team helps facilitate collaboration between liaison librarians and SCUA.
- Valuable in terms of coordinating between different units that teach (SCUA, ROI, DMC, etc.) and different teaching focuses (First-year instruction, upper-level liaison instruction, online instruction, etc.)
- Focus on best practices related to teaching in general.

Scholarly Communications Team:
- Representation from different groups
- Programming

Science Team:

- As a smaller team, we're cohesive. Our disciplines and needs are closely aligned. It's easier to schedule meetings and training sessions. We have regular communication and meetings (pre-semester meeting, mid-semester meeting, and end of semester meeting). We can adjust our meeting schedule so that we're not "meeting just to meet."
- Good programming. We're proud of what we've done and we appreciate the sessions that other teams have provided.
- The collaboration between librarians, projects between librarians - we learn from each other and work well together.
- Also the leadership of Lea has been and continues to be great. Our team leader has "watered and fertilized" us so our team has done well.

Social Sciences Team:
- Social sciences team is most active - other subject teams have struggled to find programming
- No directive for trainings (number, etc.)
- There are plenty of opportunities for training in other subject teams
- Professional development (including training, discussion of teaching, etc.) is the highlight of the structure
- Enables us to work cross-departmentally

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Question 3: What gaps do you see in terms of your team, or in the larger team structure?

Collection Management Team:
- Don't have someone from the Humanities Team - possibly bring in Maggie [this has since been enacted]

Instruction Team:
- Instruction team: Should DACTS and DMC also be included?
- Instruction team: Clearer coordination with subject teams. (For example, could instruction team members report back to subject teams during meetings?)
- Instruction team: Could we create an instructional toolkit with lesson plans, activities, handouts, instructional materials, etc.? This would be primarily a matter of collection what's already in existence and making it available to all teaching librarians.
- Instruction team: Could we build in more workshopping/brainstorming of instruction-related issues/questions/concerns?
- Instruction team: Should our team consist of members based on specific roles/representation of other teams? For example, social science team rep, humanities team rep, science team rep, SCUA rep, DMC/DACTS rep, specific positions (online learning librarian, First-year instruction librarian, etc.)

Scholarly Communications Team:
- Need someone from Social Sciences

- Need librarian devoted to Scholarly Communications to communicate with liaisons/campus
- Chair- needs to give updates on Faculty Senate Scholarly Communications Committee
- Invite ERIT to be on committee- David?
- Not as much outreach and training as wanted- time constraints
- Mission needs review

Science Team:
- Maybe working on tying together liaison team structure with P&T mentoring to see connections with publishing - working together on projects for publishing, presentations, workshops, etc.

Social Sciences Team:
- How do functional and subject teams interact? Where does one start and the other end?
- Need charge and mission statement
- Desk team? Is it still necessary for now? Can it be dormant?
- Help with workload?
- Scholarly Comm team?
- Communication/reporting out- round robin at subject team meetings for functional updates?

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Question 4: Does your team have recommendations on what could be done better or differently in relation to the team structure?

Collection Management Team:
- More of our functions are more spelled out. Like a long term working group

Instruction Team:
- Part of the reason we moved to a team structure was to be able to triage and support colleagues (for example, someone from your team could step in for you to teach or help with brainstorming ideas, etc.). This hasn't been developed in the teams so far.
- The subject teams seem to have a clearer purpose than the functional teams. Would it work to have point people for the functional areas who are on subject teams rather than having functional teams?
- Should functional team membership rotate?
- There needs to be a governance document that covers issues like:
  - Expectations of team leaders
  - Terms of team leaders
  - Mission/charge of each team
  - Expected outcomes
  - Assessment/evaluation
  - Accountability and reward structure

- Governance document, team membership/info/representation, team event calendar should be available online

Note: Should this team function more like UTLC advisory board, in more of an advisory capacity? Reminding the Information Literacy Coordinator that upper-level instruction is a thing. Bringing the IL Coordinator the issues related to upper-level instruction, training needs, etc.

Scholarly Communications Team:
- Need to spell out duties of team leaders- different between subject and functional?

Science Team:
- Let's not mandate programming or activities just to do them - having a required number/type of sessions per semester or year is not a good idea. Teams then simply try to fulfill a required number of presentations.
- It would be good to have a clearer purpose and goals for the team structure and activities - what are we trying to do?
- It would be good to have clear expectations of team leaders and transitions from leader to leader within a team.
- There should be more coordination in library instruction activities between SCUA, ROI, DMC. Could the DMC give a brief session for liaisons showing past sample projects of how they've worked with classes and how they'd like to work with liaisons?
- Maybe a Google Folder shared between on all liaisons with documentation of what all teams are doing and planning - this could help teams plan and not overlap and work together better?

Social Sciences Team:
- Set up options for observation
- Maybe set number (2 per year)
- Team calendar-
- Revisit purpose of structure
- "Blank sheet" discussion of what teams should exist and what their functions should be
- Defined goals (measurable)
- Succession planning for team leaders
- Incentive to be team leader? Where does it go on ALFA?
- Do we need functional teams?
- Collections team → work group
- Instruction team is the only functional team that offers programming- is Jenny the instruction team?
- Graduate studies team
- Research support team?
- Community outreach team (not Lynda)
- Should teams change as strategic direction of library changes?

Appendix B: Notes from team leaders' meeting #1

Team leaders met with task force personnel on 11/21/2017

Questions to shape discussion:
- What should our current purpose be? As teams, and as a liaison team structure?
- What determines who is the team leader for the teams?
  - "Theoretically" the team leaders for subject teams switch each year.
  - The functional teams keep their leaders, as their jobs put them in that function.
- Who decides if there needs to be a new team?
- Are there task forces that should be teams, or teams that should be task forces?
- Do there still need to be functional teams?
  - Some functional teams are more like working groups, such as desk and collections.
- Where does team leadership go on an ALFA?
  - Consensus was that this should be service.
  - Some tenure-track librarians need service opportunities--especially at the leader/chair level--within the library, and team leadership could be an opportunity for them.

Things that are working:
- Team structure helps keep things from falling through the cracks.
- Team structure may help some teams fill requests or pitch in for others when people are out or have competing teaching requests
- Representation from SCUA has been helpful/useful on some teams; it also offers collaborative opportunities across departments

Things that are not working as well:
- Team size can be an issue
  - Some teams are difficult to pull together because of the size of the group.
  - Are some of the teams too big? ("Yes, but there may not be a realistic way to address this.")

Other notes (not necessarily good or bad):
- Not all teams need to meet on a regular schedule; it varies.

Suggested directions:
- Implementation of a yearly team leaders team meeting
  - The idea of starting from scratch each year (to some degree) in order to look at team membership. Have team leaders discuss membership at annual meeting. This could help keep team sizes down and streamlined and give people opportunities to be on teams, if they have interest in an area.
  - This meeting could also discuss potential new teams or task forces.

- Google Drive shared folder for liaisons, as central place to store/share documents
- Workshops
    - List of workshop topics that have been held, so potentially they could be repeated/updated as needed
    - Mechanism for requesting/suggesting workshop topics
- Working group on marketing, educating, and training on E-resources, from Kate and others?
- Scholarly Communications team
    - Maybe rework this team, as new leadership will likely be coming in for this team
    - Maybe add David Gwynn (current Faculty Senate Copyright Committee rep) to this team

Discussion of future programming:
- Community service: Science Team will be doing some outreach around health and wellness (health literacy), with mandate from AAG
- Outreach around fake news
- Interest in mindfulness as a topic

Appendix C: Notes from team leaders meeting #2

Team leaders met with task force personnel on 3/23/2018

The following recommendations were used to facilitate discussion. *Italicized text indicates further discussion/questions from the group*:

- Head of ROI and AD Public Services need to serve as team coordinators, meet with team leaders monthly, hold teams and their leaders accountable, etc. (May need to delegate oversight of some ROI-centric activities if workload is an issue.)

- Discuss and write up team leader guidelines, best practices (ex. Getting credit for serving as leader), more guidance for team leaders, orientation sessions
  - *The group saw these guidelines as critically-needed, though more applicable to subject teams than functional teams.*
  - *There was discussion of potential incentives to be offered to encourage people to take on the team leader positions.*
    - *Money can't be offered as an incentive here. What about a luncheon or something like that?*
    - *Question from the group: Is serving as a team leader considered to be "above and beyond" one's job?*

- Leaders need to share schedules of teams, maybe set at beginning of each semester. Part of accountability.
  - *Consider having team leaders meet at the beginning of each semester to check in.*
  - *Consider having individual teams check in at the end of each semester.*

- Liaison retreats each summer to focus on liaison issues. Maybe early May, before our summer vacation time.

- Redefine/rebrand all functional teams and how they interact with subject teams. Have the functional team leader create working groups as needed, and/or the functional leaders work with the subject teams as needed. We still value this work and it must be done, but not as under the umbrella of "liaison team" structure
  - *Suggestion of incorporating "Subfunctional teams"*
  - *Does the Desk Team really need to be part of the liaison team structure? Desk work needs to be done, but it is not seen as a liaison function. It is more reactive.*

- Break up Humanities team into two teams. Too large to meet to discuss the nature of their own team?! (make sure SCUA member on each team) Performing/visual arts.
  - *Desire to keep teams responsive and nimble.*
  - *Keep teams open to membership shifts if/when subject area focuses shift.*

- *How could the Humanities Team be split?*
  - *By organizational unit on campus?*
  - *By subject group?*
  - *Other options?*
- *Idea: Teams (not just Humanities) could be split by user type: Undergraduate, Graduate, Faculty, Nontraditional, Transfer, Research Labs, etc. Keep reevaluating team area focuses as campus needs change.*
- *Recommendation: an implementation group/team to address form of functional teams and potential splitting of teams as needed.*

- Continue workshops and learning opportunities

- Look at roles and responsibilities document- revise?

- Recommended activities for subject teams:
  - Curriculum mapping
  - Online learning- identifying courses, building skill sets
  - Discussing efforts to connect with new faculty
  - Challenging reference questions
  - Designing lesson plans, instructional strategies. Workshopping planning a new course
  - Plan workshops
  - Zotero?
  - More emphasis on grad students
    - For humanities, primary sources
    - Exhibits
    - Data management
    - Systematic reviews
    - Mapping data

Appendix D: Fall 2017 Liaison Team Structure Survey Questions

Question 1: Realizing that how you spend your time varies over the course of a semester, indicate how you currently spend your time, with approximate percentages.
You may use your ALFA percentages as a guide. If these categories do not apply to you, please enter N/A.
   A. Professional responsibilities. Enter percentage or N/A below: *
   B. Professional and campus service. Enter percentage or N/A below: *
   C. Scholarly and creative work. Enter percentage or N/A below: *
   D. If you have further comments on this, please enter them here.

Question 1b: Please indicate how you currently spend your time in relation to your liaison work. Please provide approximate percentages (or N/A) in the five areas below, and include brief explanations if needed.
   A. Teaching and learning (instruction sessions; developing assignments, tutorials, guides, etc.; embedding in classes; assessment). Enter percentage and explanation if needed. *
   B. Research support & consulting (consultations to students and faculty in person or via email, chat, etc.). Enter percentage and explanation if needed. *
   C. Collections (developing print and electronic collections, reaccreditation and program reviews). Enter percentage and explanation if needed. *
   D. Outreach and promotion (outreach to academic units, Learning Communities, attending meetings and other events). Enter percentage and explanation if needed. *
   E. Scholarly Communication (promoting open access, NC DOCKS, author rights and current publishing trends). Enter percentage and explanation if needed. *
   F. Other / further comments, if desired:

Question 2: What responsibilities have been the highest priorities in terms of providing effective service for your departments?
Please rank options below. 0 = Not applicable; 1 = lowest priority; 2 = low priority; 3 = medium priority; 4 = high priority; 5 = highest priority
   A. Teaching and learning (instruction sessions; developing assignments, tutorials, guides, etc.; embedding in classes; assessment) *
   B. Research support & consulting (consultations to students and faculty in person or via email, chat, etc.) *
   C. Collections (developing print and electronic collections, reaccreditation and program reviews) *
   D. Outreach and promotion. (outreach to academic units, Learning Communities, attending meetings and other events) *
   E. Scholarly Communication (promoting open access, NC DOCKS, author rights and current publishing trends) *
   F. Please provide any additional comments on your rankings, if desired.

Question 3: Which liaison responsibilities or opportunities do you feel need additional attention and time? What kind of support might make it possible for you to devote the needed time?

Select all areas to which you would like to devote additional attention and time: *

- A. Teaching and learning (instruction sessions; developing assignments, tutorials, guides, etc.; embedding in classes; assessment)
- B. Research support & consulting (consultations to students and faculty in person or via email, chat, etc.)
- C. Collections (developing print and electronic collections, reaccreditation and program reviews)
- D. Outreach and promotion (outreach to academic units, Learning Communities, attending meetings and other events)
- E. Scholarly Communication (promoting open access, NC DOCKS, author rights and current publishing trends)
- F. Not applicable
- G. Other:
- H. What kind of support might make it possible for you to devote the needed time?

Question 4: If some of your current work could be spun off to a team, which of the following areas would you select? Please include a rationale. Be as specific as possible and include estimates of time which might be saved or ways in which these responsibilities might be delegated to others.

Select all areas you would like to relinquish: *

- A. Teaching and learning (instruction sessions; developing assignments, tutorials, guides, etc.; embedding in classes; assessment)
- B. Research support & consulting (consultations to students and faculty in person or via email, chat, etc.)
- C. Collections (developing print and electronic collections, reaccreditation and program reviews)
- D. Outreach and promotion (outreach to academic units, Learning Communities, attending meetings and other events)
- E. Scholarly Communication (promoting open access, NC DOCKS, author rights and current publishing trends)
- F. Not applicable
- G. Other:
- H. Provide estimates of potential time saved or ways in which these responsibilities might be delegated to others.

Question 5: Roles of liaisons

Current Liaison Roles Statement:

http://library.uncg.edu/info/liaison_department_responsibilities.aspx

Do you think the current Liaison Roles Statement needs to be changed or updated? *

- A. If you answered "yes", how would you suggest changing or updating the statement?

Question 6: Please provide any other thoughts regarding liaison responsibilities and workload issues:

Question 7: From your perspective, what aspects of the team structure and associated activities are working well?

Question 8: From your perspective, what aspects of your team structure and associated activities are not working well?

Question 9: Do you have recommendations on what could be done better or differently in relation to the team structure?

Question 10: What suggestions do you have for our current mix of subject and functional teams?

Appendix E: Themes drawn from fall 2017 survey responses

1. Uncertainty about ALFA/workload percentages; what they are and what they should be (how are percentages used in ALFAs and tenure reviews?)

2. Desire for writing time

3. Workload issues
   a. Feeling of "not enough time": workloads keep increasing with ongoing campus growth and ever expanding liaison roles
   b. Idea of balancing liaison departmental assignments by FTE

4. Need for liaison role prioritization
   a. Should our emphasis be on broad, shallow support of many classes and programs, or on more narrow, impactful support of core / capstone / research-intensive classes and programs?
   b. Level of embeddedness - expected v. desired
   c. Balancing functional liaison roles with subject roles. Our emphasis seems to be functional positions (ex. The future scholarly communication and GIS positions)
   d. Possible need to tweak liaison responsibilities document to reflect new responsibilities

5. Concern about amount of time and communication devoted to reference desk staffing

6. Desire for more sharing between liaisons
   a. Mention of digital space as one way to address this
   b. More meetings? ("I don't think the teams meet as much as they should")
      i. Suggested once-a-year all-liaison-team-member meeting
      ii. "More meetings" (2x/year?)
      iii. Difficulty of scheduling meetings (impact of team size on this?)
   c. Desire to learn about what other teams are doing
   d. Appreciation of in-house, liaison/team-driven workshops as learning opportunities
      i. Suggested transition to externally-focused workshops

7. Collaborative outreach - what does this look like?

8. Team size
   a. Appreciation of small teams
   b. Questioning size of some teams
   c. Suggestion to merge several teams

9. Team leadership:

      a. Nature of (desire for more clarity on this role)
      b. Getting credit/recognition for this work
      c. Accountability
      d. Sharing with other team leaders
      e. Cross team communication

10. Interest in "blank slate" brainstorming of what subject and functional teams are needed in 2018
      a. Rethink purpose, roles of functional teams; redefine some as working groups?

11. Need for scholarly communications support (but lack of details about what, specifically, within that realm)

Appendix F: Fall 2017 survey responses

Overall notes:
- Response rates were low, even after repeated call for responses.
- Full response charts/analytics are available for ROI and non-ROI responders; text comments are included below.

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Question 1a: Realizing that how you spend your time varies over the course of a semester, indicate how you currently spend your time, with approximate percentages.
- This is what is on my ALFA, but scholarly work takes up more than 5 - maybe closer to 10-15?
- During campus breaks, this changes radically and the percentage loads towards scholarly and creative. Thank heavens for breaks!
- I don't know how accurate my percentages are; I struggle with that.

Question 1b: Please indicate how you currently spend your time in relation to your liaison work.
- This is a rough guess - number 4 takes up more time than collections because I work with the eresources librarian for collections assistance.
- I realize this is a little out of balance, but I'm not sure how to fix it.
- I am not a departmental liaison, so many of my duties fall in areas beyond what's on this list

Themes:
- **Uncertainty about ALFA/workload percentages; what they are and what they should be (how are percentages used in ALFAs and tenure reviews?)**

****

Question 2: What responsibilities have been the highest priorities in terms of providing effective service for your departments?
- It isn't realistic to assign the highest priority to every single responsibility. That doesn't stop us from trying to do that.
- I work with Beth Bernhardt/Anna Craft on Open Access, NC DOCKs - so it would be a higher rank, but they do so much to help me.
- They should really all be 5s, but I am reflecting the realities of my constraints in my answers.

Follow-up:
- **Is there an ROI/Libraries expectation for how the liaison responsibility areas should be prioritized? Should there be variations by subject focus?**

****

Question 3: Which liaison responsibilities or opportunities do you feel need additional attention and time? What kind of support might make it possible for you to devote the needed time?

- We still spend much time with reference desk work and staffing communication (including the possibility of still having to work a weekend day -- quite rare among our peer libraries nowadays, I think).
- Consultations take up a lot of time, but are very valuable - but many times there is not enough time in the semester to do consultations with all students/faculty. I am not sure how to fix this issue. Teaching and learning is of course important and valuable, but to get classes signed up you need to out appropriate outreach and promotion. All of these work together to make a successful liaison. That's why I checked all 4. The only reason I did not check Scholarly Communication is that I believe that access services does a good job supporting us with this.
- I think having some release time for writing would free up some of my work time to engage in higher level embeddedness. Also, I think it would be useful to have a couple of workshops on how to be more involved in Scholarly Communication efforts, and maybe some direction and initiatives.
- I feel like I need more time for all of them. Not sure about what kind of support would help. Cloning? Part of our discussion going forward, I suppose. I do get lots of support from my colleagues, for example, the teaching sessions are great. But sometimes I don't have time to take advantage or my schedule won't allow attendance at meetings. That can be frustrating.
- Fewer demands in other areas
- I think that my time is fairly well balanced, although I would like some designated writing time.

Themes:
- **Desire for writing time**
- **Workload issues**
  - **Feeling of "not enough time": workloads keep increasing with ongoing campus growth and ever expanding liaison roles?**
- **Need for scholarly communications support (but lack of details about what, specifically, within that realm)**
- **Concern about amount of time devoted to reference desk hours**
- **What is our goal: Broad, shallow support of many classes and programs v. narrower, more impactful support of "core" classes and programs?**

****

Question 4: If some of your current work could be spun off to a team, which of the following areas would you select? Please include a rationale. Be as specific as possible and include estimates of time which might be saved or ways in which these responsibilities might be delegated to others.

- Not sure

- I selected all of these because everything could be helped by a team structure in terms of learning from each other (peer review instruction, learning from how others are doing consultations and outreach and instruction effectively, etc. We already have a team structure in place that helps me learn from others very well - my main suggestion would be more sharing of what other liaisons are doing in these areas - but then of course there is a time issue.
- If we could save 2 hours per week of desk time, we could devote those hours to more of these other categories. One thought is that one librarian could be considered the "desk librarian" and relieved from other duties to work more desk shifts. I can think of one in particular who might be interested. Or, we could add a permanent part time "desk" librarian.
- Theoretically the ALL could be spun off in some parts. Would I like that? No. I enjoy all of these activities. OK, to be more helpful, I think I could use more help with Scholarly Communication and I know that is coming soon...yay!

Themes:
- **Desire for more sharing between liaisons**
- **Appreciation of in-house, liaison/team-driven workshops as learning opportunities**
- **Need for scholarly communications support (but lack of details about what, specifically, within that realm)**
- **Concern about amount of time devoted to reference desk hours**
- **Need for liaison role prioritization?**

****

Question 5: Do you think the current Liaison Roles Statement needs to be changed or updated?
ROI answers:
- **Yes: 42.9%**
- **No: 42.9 %**
- **Other: 14.3% ["Tweaked perhaps, but not majorly changed"]**

Non-ROI answers:
- **Yes: 0%**
- **No: 20%**
- **This is not applicable to me: 60%**
- **Other: 20% ["It is worth reviewing. I think the team approach has been a good process."]**

Comments from those who answered "yes":
- Move scholarly communication items to teaching, consultation, and other activities.
- Maybe something about face to face and online and working with adjuncts as well as faculty ....
- We should add more examples of collaborative outreach and look at tweaking the general responsibilities of liaisons to reflect new responsibilities we might have picked up.

Follow-up:
- **Need some clarification on these comments**
- **Need a "blank slate" discussion of liaison roles, then compare to the existing document?**

Themes:
- **Examples of collaborative outreach**
- **Tweak liaison responsibilities to reflect new ones (are they talking about the roles document?)**

****

Question 6: Please provide any other thoughts regarding liaison responsibilities and workload issues:
- I enjoy all our official liaison roles, but since I'm now responsible for over 20% of UNCG students (based on enrollment data), I will continue to have to be very selective in which classes and programs I give significant attention too. I sometimes think that spreading out our student coverage equally across the liaisons should be important, but I do like my current mix of assignments and find it logical.
- This statement is an idealized picture of liaison librarianship: http://library.uncg.edu/info/library_liaison_responsibilities.aspx. Maybe make it clear that it isn't feasible for all liaisons to engage in all bullet points? Librarians from other institutions have asked me how it's possible for one person to do all of these things. In many cases, it isn't possible.
- The current Statement captures well the goals we should be working toward
- There is always the issue of too much to do and too little time to accomplish everything - I think learning from each other is the best support we can give - if there is ever time. There are many things in place already that support this - mentoring, workshops, etc. Maybe a digital space (Google or Box folder) to share ideas and workflows might be helpful - based on the time issue.
- One challenge we have as liaisons is that we are trying to become further embedded in our departments, which often takes us out of the office and into their buildings. As our engagement deepens, it creates a void where we aren't around HERE as often to help students, and are always looking for desk shift trades to engage in these departmental instruction and outreach opportunities. With only so many hours in the day, it's a constant juggling act. It would be useful to have a group discussion as to how we should best allocate our time, and how "embedded" we can realistically be. If you undermarket, you are not as involved with your departments as you should be. If you overmarket, you end up making promises you are unable to keep. How do we strike the balance?
- Maybe we could have careful discussions about how to prioritize when you have an overload or what to do when you can't do something that needs doing.

Themes:
- **Balancing liaison departmental assignments by FTE?**

- **Balancing functional liaison roles with subject roles. Growth here has been with functional positions.**
- **Desire for more sharing between liaisons**
    - **Mention of digital space as one way to address this**
- **Workload issues: feeling of "not enough time"; prioritization needed?**
- **Level of embeddedness expected or desires**

Follow-up:
- **Is the liaison role statement supposed to reflect reality, or an ideal situation?**

****

Question 7: From your perspective, what aspects of the team structure and associated activities are working well?
- opportunities for more specific and relevant discussions; spinning off topic like weeding plans to a smaller group
- The peer professional development is good.
- Information is shared in a useful way between colleagues with similar interests and skills
- Supportive - the teams I am on are very open and accepting of new ideas.
- I love the workshops the teams offer- they have been a godsend to me when working with reference questions outside of my discipline. I have also made major changes to how I teach based on some of the Instruction Workshops. In my own subject team, we often pinch hit for one another if there are conflicts in our schedule when an instruction request comes in.
- It's a good point of access for discussion about ongoing issues and new developments.
- We are getting LOTS of great work done and as far as I can tell our reputation is awesome. Not a reason to sit back and relax, but should be celebrated and acknowledged. I feel as though we work so hard we forget to champion ourselves and each other. More parties!!! :-)
- I feel positive overall about the team structure, though I have little knowledge of the workings of the teams I'm not part of, and I'm not sure about the activity levels of the various other teams - I'm realizing there have been workshops and professional development activities that have been put on and may have been created by certain teams, but I didn't realize the activities were associated with the team structure. I don't feel that it's necessarily critical to "brand" such activities ("brought to you by the humanities team!"), but it might raise overall awareness of the team activities, if that seems like an important thing to do.
- Small groups are more productive
- The way each team can focus on a subject or functional area.
- Sharing knowledge and experience with colleagues.

Themes:
- **Appreciation of in-house, liaison/team-driven workshops as learning opportunities**
- **Desire for more sharing of knowledge between liaisons to learn what other teams are doing**
- **Team size (appreciation of small teams)**

Follow-up:
- **Should teams be publicly listed (Martin's question), or are they purely internal in focus?**

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Question 8: From your perspective, what aspects of your team structure and associated activities are not working well?
- Lack of accountability (ex. team leaders that aren't getting discussions scheduled); lack of support and meaningful recognition for leaders (which might be leading to the first thing I wrote); finding time for events is always hard, particularly with liaisons.
- Cross team communication is challenging. I don't have time to be on more teams, but I'm no longer up to date on issues related to some functions. It's probably hard to organize liaison wide communication and I wouldn't have time for frequent meetings.
- Time management - everyone is too busy to be able to work together as much as we could be - even meeting during the semester is difficult. Also teams never communicate with other teams - again, maybe the digital space could help this issue.
- I am not sure anything is not working well, but I think some discussion is needed as to the purpose of subject AND functional teams, along with some priority setting. Some functional teams appear to be less active than others, and I'm wondering if the less active teams need to be disbanded or rethought. Others are really more working groups than teams- Collection Development and Reference Desk, for example.
- I can't say for certain, but I don't think the teams meet as much as they should.
- As a team leader, I think there needs to be clearer roles for what the leaders should do. I do not believe in having a meeting because it has been a long time. If something can be done online, that is fine. Emphasis on pre and post semester in person communication makes sense, but not necessary during semesters.
- Low engagement/activity on the team I am on
- trying to actually meet - hard to get everyone together

Themes:
- **Team leadership: nature of, getting credit for, accountability, sharing with other team leaders; cross team communication**
- **Desire for more sharing between liaisons**
  - **Mention of digital space as one way to address this**
  - **More meetings? ("I don't think the teams meet as much as they should"**
- **Difficulty of scheduling meetings (impact of team size on this?)**
- **Rethink purpose, roles of functional teams; redefine some as working groups?**
- **More clarity of team leader role**

****

Question 9: Do you have recommendations on what could be done better or differently in relation to the team structure?

- give leaders more recognition and allowance for their service; more reporting back to the full liaison group on activities and accomplishments
- Maybe increase team focus from peer professional development to external (to the libraries) workshops and also departmental outreach. Some of this is happening already.
- Not really
- Answered above - but dealing with the overall issue of time management might help. I believe that tenured track librarians are very busy, which means they have to sacrifice doing their liaison abilities to the best of their abilities. The research aspect especially means we are pulled in many different directions - making it hard to better support our faculty.
- I think we need to rethink membership and decide if any of the teams are too big. We also need to look at incentives for becoming team leaders- and better define the roles of both the team leaders and the team members.
- I'm interested in the conversation, but don't have specific suggestions at this time.
- I don't know if it might be helpful to have perhaps a once-a-year all-team-member check-in meeting. This could be a venue for giving context to the whole group about the structure of the teams (new people will inevitably join teams and may not have the big picture, and people like me who are not in ROI and not departmental liaisons may also lack the big picture). There could be a brief (very brief) overview/share-out of activities of teams, and the teams could learn from what has worked for others. I know this would be hard to schedule, but I feel like it could be of value.

Themes:
- **Desire for more sharing between liaisons**
  - **Suggested once-a-year all-liaison-team-member meeting**
- **Workload issues**
- **Team size**
- **Difficulty of scheduling meetings**
- **Team leadership recognition**
- **External work v. internal support**
- **Team size (questioning size of some teams)**
- **Appreciation of in-house, liaison/team-driven workshops as learning opportunities**
  - **Suggested transition to externally-focused workshops**

****

Question 10: What suggestions do you have for our current mix of subject and functional teams?
- Reduce the number of teams. Maybe get rid of the data/scholarly communications team. Maybe merge Sciences with Social Sciences. Maybe open the desk team to include someone from Access Services and someone from the DMC.
- There seems to be a fine balance as is, given the various goals that the Libraries have.

- Answered above - with the addition of maybe having a full team meeting once a year to share what other teams are doing - as well as having the digital space. Maybe something like a Slack channel would work as well to get updates.
- Might there be a team for outreach or new services?
- More meetings (twice a year, perhaps?) of the leaders to keep communications flowing. Or perhaps just emails...see above about meetings ;-) THANK YOU for asking these questions. Looking forward to more discussions!
- I think the mix is good, I don't have suggestions. (But I'm not a departmental liaison.)
- Some people, by virtue of their work, are facing great demands. I wouldn't recommend adding too many more teams. The existing ones seem pertinent.
- I think that having the two categories of teams is a useful approach to the system

Themes:
- **Workload issues**
- **Team size (suggestion to merge several teams)**
- **Need for "blank slate" brainstorming of what subject and functional teams are needed in 2018?**
- **Desire for more sharing between liaisons**
    - **Mention of digital space as one way to address information sharing**
    - **"More meetings" (2x/year?)**