Liaison Librarian Task Force 2012-2013

The University of Maryland Libraries

FINAL REPORT

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Executive Summary

Libraries and librarians are facing an uncertain future, as new disruptive technologies, different expectations from higher education, diverse scholarly communication models, and a constantly changing climate in academic institutions are converging with teaching and research. Libraries and librarians will be forced to compete with other academic units for limited financial resources and will be challenged to prove the value and the impact of their services. Moving away from a traditional model of "containers for information" toward "platforms for learning," libraries and librarians will become more involved in the educational and research processes. This requires that librarians adopt new roles, new identities, new responsibilities, and new attitudes. By spending time in a particular academic community, librarians will be able to gain a first-hand understanding of the culture of research and how scientists and scholars think, speak, behave, collaborate, perform their research and communicate their findings. This will help them in assessing the needs, expectations, and specific educational and research environments in the different disciplines and academic units. One important aspect of these new environments will be the re-examination of the Libraries' role in the research process at a time when information, research methods, and pedagogy are becoming increasingly digital. The UMD Libraries are engaging with the University in new initiatives such as eResearch and increasing the Libraries' participation in the research process.

Several significant trends in library services include the need for new assessment tools, close collaboration with faculty in academic units, and a comprehensive and holistic approach to collection development. Subject specialization has become increasingly important for liaison librarians in research institutions, as liaison librarians collaborate more closely with teaching and research faculty. Different organizational structures, new kinds of jobs and partnerships among the key organizations will change how liaison librarians perform their duties and reach out to their audiences. Research libraries are positioned to provide both the platform and the skills needed to create new forms of scholarship and to disseminate that content. Close integration with academic departments and units will determine the level of "embedded-ness" and success of the liaison program at the individual subject librarian level.

Technology increasingly impacts access to and assessment of collections. Libraries must combine collection development with other liaison activities into a comprehensive liaison program. The overall trend in research libraries is a dramatic decline in traditional reference services. New service models demand that we design services for in-depth research consultation as well as create state-of-the-art spaces and facilities for teaching, learning and research. Outcomes assessment has become a major requirement in higher education, and we must develop appropriate quantitative and qualitative tools to measure student achievement. Elements of successful outreach include services, being responsive to requests, having expertise in the discipline and its literature, knowing the academic unit, and being visible within the University. Familiarity with trends in scholarly communication and advocating for open access have become core responsibilities for liaisons as they educate library users about these issues.

Task Force Recommendations

The Liaison Task Force offers several recommendations. These recommendations center on the creation of formal policies, guidelines and programs for liaison librarians. The bibliographies and other supplementary materials to this report include documentation for implementing the recommendations.

The Liaison Task Force recommends:

- Adoption of a variety of guidelines and assessment tools for each of the five rubrics, emphasizing that liaison librarians will select those that are appropriate for their specific positions.
- Development of a formal assessment program that states clear expectations for documentation of assessment, including types and frequency, under each rubric. The program should include both quantitative and qualitative assessment when appropriate, and should also include formative assessment measures for junior librarians. When necessary assessment should also document environmental barriers that hinder liaison librarians' abilities to perform certain tasks.
- Development of a formal training program for liaison librarians, including both training for new librarians and continuing professional development for senior librarians. The training program should initially emphasize new and emerging areas such as scholarly communication and outreach. Liaison librarians should be surveyed to determine areas of most need.
- Creation of checklists for each rubric and for both junior and senior level librarians to facilitate tracking of required duties and assessment activities.
- Greater visibility of subject specialist liaison librarians within the Libraries' web presence.
- Development of a program to recognize, publicize and award the achievements of liaison librarians. This can be integrated with other Libraries programs, and should include creation of a web page that highlights key professional achievements of liaison librarians, including awards, honors, and national offices.
- Creation of a print and digital brochure for the liaison program, including the behavior guidelines, assessment information, and librarian honors and awards.
- Regular review of the entire liaison program at least every three years.

BEHAVIORAL PERFORMANCE GUIDELINES FOR SUBJECT SPECIALISTS/LIAISON LIBRARIANS

University of Maryland
2012-2013

Subject specialists who serve as liaison librarians at the University of Maryland have responsibilities in the following five areas:

- *Collections content and access*
- *Reference and research consulting and mentoring*
- *Teaching, learning and literacies*
- *Outreach/Engagement*
- *Scholarly communications and Research Data Services*

Discipline-specific needs, practices, and circumstances should be taken into account in evaluating librarian's engagement and performance. Because of the varied disciplines in which subject specialists work, not every statement is relevant to every librarian's job, and probably no librarian performs every one of these. Still, most of the guidelines are relevant for most of the subject librarians in the Libraries.

These guidelines generally conform to the *ALA standards manual* and refer frequently to documentation from ALA, SLA and other professional organizations; these are listed under "Reference and resources."

COLLECTIONS CONTENT AND ACCESS

Subject specialist liaison librarians at the University of Maryland Libraries develop, manage, and facilitate access to collections in all formats and media to support both undergraduate education and advanced research in their assigned academic units. Subject specialist liaison librarians actively engage with library users as we transition to the digital library while continuing to provide outstanding support for unique materials in all physical formats. Librarians also collaborate with information professionals in other disciplinary areas, at other institutions, and within professional associations and consortia to create interdisciplinary collections supporting the curriculum and research agenda of the University of Maryland College Park, the citizens of Maryland, and the international community of scholars.

Expectations

- Meet with collegiate faculty to discuss future collection needs to support changes in the curriculum and in faculty and graduate student research agendas.
- Advise the administration on future collection needs of their assigned academic units.
- Participate in governance of collection development.
- Manage physical and digital collections in all formats in view of changing campus needs for student learning spaces.
- Create guides to collections for researchers at all levels in their assigned subject areas.
- Author subject-specific collection development policies that address content, levels of coverage, formats and media, and location and retention of collections.

Behavioral guidelines

- Librarians provide access to information in all formats and media as necessary to support the mission of the Libraries and the University of Maryland. Librarians develop electronic collections to support research and teaching at the University, including online and distance learning initiatives.
- Librarians create detailed collection development policies that address issues including subject coverage, multiple formats and media, diversity, foreign language and international materials, and issues of space, remote storage, and de-selection.
- Librarians consider new collection development models such as "just in time v. just in case" and user driven acquisition. Librarians involve faculty, students and other stakeholders in the development and assessment of collections.
- Librarians manage collections funds responsibly, and collaborate with the Libraries' Development Office to demonstrate outstanding and effective stewardship of gifts.
- Librarians participate in professional development about collection content and access through meetings, videoconferencing, mail lists via email, social networking and other available communication methods and forums.
- Librarians mentor colleagues in collection development strategies through listening, coaching, observing, providing peer assessment, and serving as models.

Assessment and evaluation tools and documentation

- University Libraries' Strategic Plan
- Document conversations with collegiate faculty regarding changes in the curriculum and in faculty and graduate research; revise collection strategic priorities to reflect such changes.
- Annually update collection development policy statements. Include documentation of changes in collection focus and reasons for such changes such as new curricula and research initiatives.
- Documentation of individual collection assessment projects.
- Collection use statistics for materials in all formats and media.

REFERENCE AND RESEARCH CONSULTING AND MENTORING

The subject specialist liaison librarians actively engage and participate in providing services to students, faculty and outside researchers to explore in-depth research in the area of their expertise. The subject specialist liaison librarian is a resource for both faculty and students in their assigned academic units, as well as other researchers needing assistance with library resources. The subject specialist liaison librarian acts as guide and mentor for advanced and specialized reference and research needs.

Expectations

- Subject liaison librarians provide effective, responsive reference service through all media: in-person: telephone; virtually using multiple media including email, instant messaging, and social networks; and other means that may be available as technology changes. Librarians provide services for multiple user constituencies, including office hours for research consultations and

accessibility in multiple media.

- Librarians provide excellence in reference transactions, including approachability, civility, respect for diversity including diversity in learning styles, appropriately conducted reference interviews and timely follow up when necessary.
- Librarians provide reference tools in the form of written and electronic guides to the literature.
- Librarians monitor and understand the most recent changes in the production of knowledge in the related subject discipline and the knowledge base as a whole. Librarians participate in professional development about reference and research consulting and mentoring
- Librarians document and analyze data concerning reference transactions with a view of defining and applying best practices in the discipline.

Behavioral guidelines

- Participate in reference service (both physical and virtual) throughout the Library.
- Work in a collegial manner with other departments and services. Consult and refer to other library personnel when appropriate.
- Keep up with technology that enables reference services
- Be approachable. Understand diversity needs of our patrons, including diversity in learning styles. Respond within 24 hours to questions received via email or over the phone.
- Create and maintain guides to the resources available to the users in all formats. Create and maintain a variety of links to useful internet resources for users
- Share information on specific assignments and resources with others working reference hours
- Use current awareness services and regularly review the professional literature. Participate in library sponsored forums, training, meetings, etc. in regards to reference services.
- Attend librarian and subject specific conferences, workshops, training in person or through videoconferencing, webinars, etc. Keep abreast of publications and trends in the subject area.
- Market reference services to academic units, students and individual faculty. Use mail lists via email, social networking and other available communication methods and forums.
- Mentor colleagues' reference service strategies through listening, coaching, observing, providing peer assessment, and serving as models.
- Improve referral services within the Libraries particularly from the reference desk using latest technologies.
- Work with teaching faculty to identify physical spaces that might be used for the highest exposure of reference services to students and faculty, including outside the Libraries' physical spaces.
- Maintain statistics to track numbers and types of questions received. Regularly reviews the types of questions being received. Maintain a log of consultations being provided and topics discussed, using available reference statistical software.

Assessment and evaluation tools and documentation

- University Libraries' strategic plan
- Feedback and responses (written notes, email, IM, etc.) from library users
- Acknowledgements in books, articles, dissertations and other scholarly or creative works.
- Peer assessment of services
- LibAnswers and other assessment instruments

- Website usability assessments and use statistics to measure impact for created guides, web pages, and other online research tools.

TEACHING, LEARNING AND LITERACIES

Subject specialist liaison librarians at the University of Maryland Libraries engage in instructional activities that could be face-to-face, online instruction, or blended classes in areas of their specialty, as well as in general, core and other courses such as the Professional Writing Program (PWP), Gemstone and College Park Scholars. Liaison librarians offer training for databases, research tools, bibliographic management programs, and in other areas to support education and research. Librarians collaborate with instructors to integrate library instruction into the curriculum, as well as into the educational and research environment of the University of Maryland.

Expectations
- Educate and inform students and faculty about available information resources and research tools and how to use them
- Collaborate in the design, implementation, and maintenance of online tools and services that meet the needs of disciplinary and interdisciplinary research communities
- Proactively establish partnerships with teaching faculty and researchers; move away from teaching single classes by invitation toward a more active participation in courses; conduct needs assessment and spend time understanding a community before assuming its needs; understand the research and scholarly communication patterns of the disciplines; teach in subject-specific and general curriculum courses
- Implement innovative instructional design approaches and formats; acquire new skills and knowledge by attending in subject-specific courses and conferences and by participating in departmental seminars.
- Design and develop appropriate qualitative and quantitative methods to evaluate quality of instruction and its impact on student academic performance and retention; use feedback from faculty and students to measure performance; create a culture of quality by constantly evaluating, re-inventing, adjusting instruction methods and finding new opportunities for teaching

Behavioral Guidelines
- Align instruction with university strategic plan and develop understanding of the university educational goals and programs
- Develop standards for general-education courses and discipline-specific ones that librarians need to follow; create discipline-specific templates for teaching core resources for their subject areas; share experiences with other librarians on instruction practices/templates; peer-review instruction approaches, templates, sessions
- Consider *discipline*-specific needs, practices, and circumstances of individual courses and tailor instruction accordingly
- Develop a conceptual framework for teaching, learning and assessing the impact of instruction on student academic performance; familiarize with major bibliographic management programs
- Develop methods for assessing student learning and the impact of library instruction on overall student academic performance and retention; perform LOAs on a regular basis for most of the

instruction classes; document feedback from students and instructors

Assessment and evaluation tools and documentation
- Document the frequency, type, and variety of engagements in assigned subject areas and the general education curriculum
- Assess alignment with institution's priorities and needs
- Collect and analyze evaluations and feedback from instructors, graduate assistants, students, and peers.
- Implement new technological and pedagogical advances in instruction
- Analyze and implement results of student learning outcomes assessments
- Document repeated invitations to teach for the same course
- Propose and engage in new initiatives such as offering new classes, seminars and workshops in specific areas of interest to faculty and students
- Document teaching of new material, for example, for new classes, which require more preparation time
- Discipline-specific outreach sessions and tours for the community

OUTREACH AND ENGAGEMENT

Subject specialist liaison librarians actively participate in the intellectual life of their assigned academic units. They support the success of the research and public programs, department projects, galleries, and research centers of their assigned units. Subject specialist liaison librarians engage with faculty and students as colleagues and as mentors in disciplinary activities. Librarians keep their assigned academic units updated about the Libraries' facilities and services. They engage in fundraising and development activities to the benefit of the Libraries and their assigned units. Librarians collaborate with assigned units in programming and outreach activities. They participate in outreach to the Libraries, to the University, to the community, and to the profession in development and fundraising, strategic planning, diversity initiatives, operations, faculty governance, and other areas of service.

Expectations
- Understand the research and teaching directions for their assigned communities, both emerging and waning interests, and how the Libraries can support those needs
- Identify key people in the department and their roles and make contact with them (department head, academic officers, grad and undergrad administrators, communications staff, faculty in leadership positions (e.g. curriculum coordinators, etc.))
- Participate in the academic operations of the colleges, departments, and programs of assigned communities
- Identify potential donors and work with the Libraries Development Office to cultivate donors as appropriate
- Identify key vendors, publishers, and book dealers and actively cultivate relationships as appropriate

Behavioral guidelines
- Librarians form and work with library advisory committees, identify champions within the department and take steps to cultivate relationships
- Librarians articulate why specific services are important to their communities and actively

promote these, implementing robust communication methods, working closely with the Communication Office
- Librarians proactively communicate with all members of the department, meet with candidates who are interviewing for faculty, post-doctoral, and graduate student positions, and give specific attention to new members by introducing them to relevant library services
- Librarians participate in the creative efforts of the communities they serve, including artistic or literary creation, musical or dramatic performance, creating of exhibits, and other relevant venues, cosponsoring lectures, films, and other events with assigned communities
- Librarians co-research, co-present, and co-publish with collegiate faculty, teach credit courses for units they serve, attend meetings, participate in strategic planning, and volunteer to serve on committees, task forces, and other working groups within assigned communities
- Librarians identify potential projects / activities for grant funds; assist in the preparation of grant proposals. If appropriate, serve as principal investigator
- Librarians generate funding ideas for use by the development officer and grant writing as well as meet with existing and potential donors to cultivate relationships

Assessment and evaluation tools and documentation
- Document participation in and its impact on departmental, college, campus committees, as well as presentations at departmental meetings, seminars, and colloquia, as well as evidence that members of the assigned communities seek out their liaison when needed
- Periodic survey of faculty, students, and administrative staff of assigned units
- Articulate and provide evidence for effective and robust methods for contacting and interacting with their communities, e.g., meaningful and substantive feedback and input from their communities

SCHOLARLY COMMUNICATIONS AND RESEARCH DATA SERVICES

Subject specialist liaison librarians at the University of Maryland form vigorous, sustainable and long-term relationships with research faculty. They are recognized for their advanced subject knowledge and expertise in information policy, author and intellectual property rights, and a suite of research skills, such as data mining, curation and management customized specifically for their academic specialty. Liaisons collaborate fully with faculty on complex research projects, including citation management, data creation and preservation, usage rights, and assisting with distribution of finished works and raw data by promoting open access and local, domain, or national repositories. Subject specialist liaison librarians are consulted on their expert knowledge of the publishing industry and the scholarly communications cycle by faculty in editorial development and production and in impact metrics for tenure & promotion review. Subject specialist liaison librarians actively assist in building the university's institutional repository. Librarians also provide project consultation on all aspects of data management and long-term data curation. Librarians connect faculty to relevant services and resources across the campus, as well as regional and disciplinary data repositories for long-term archiving.

Expectations
- Educate and inform faculty, students and campus administrators about scholarly communications issues; advocating for sustainable models of scholarly communications
- Work closely with faculty and students to understand their changing workflows and patterns of scholarly communication; assist in the development and creation of tools and services to

facilitate sustainable scholarly communication and research data management life cycles
- Support and promote the Digital Repository of the University of Maryland (DRUM) and library initiatives for future publishing enterprises
- Develop expertise in copyright issues pertinent to assigned areas
- Participate in defining library roles in e-scholarship
- Collaborate in the design, implementation, and maintenance of online tools and services that meet the needs of discipline/interdisciplinary research communities of practice

Behavioral guidelines
- Librarians advise users on the use of copyrighted works regardless of media or format, identify gaps in existing support for current and future practice of e-scholarship, and educate faculty and students understanding their rights as authors,
- Librarians contribute content to copyright and/or scholarly communications web sites, e.g., in areas such as publishing, institutional repositories and promoting Open Access
- Librarians help administrators, faculty and students understand the role of institutional initiatives in building and preserving digital collections and research data
- Librarians help faculty understand their obligations to funding agencies to preserve and make accessible their research data long-term
- Librarians assist in content recruitment; identifying digital resources that require long-term preservation and merit sustained access
- Librarians help shape approaches for the successful evolution of digital preservation and access
- Identify areas where new online learning and digital tools can place the Libraries into the flow of teaching, learning and research

Assessment and evaluation tools and documentation
- Document conversations, appointments, talks, presentations with administrators, faculty and students regarding e-scholarship, copyright, author rights, long-term research data management, and digital tools, as well as pertinent publications and professional presentations
- Document pertinent committee work and collaborations with Research Data Services
- List pertinent projects of which you are principle investigator or project manager
- Document participation in the creation/development of innovative services

COLLECTIONS CONTENT AND ACCESS

Both collection development and liaison activities feature prominently in the recent professional literature of librarianship. The literature also contains considerable overlap between these two topics. This overlap focuses on several specific important trends in the practice of library services, including the need for disciplinary knowledge, the importance of assessment initiatives, problems of data collection, collaboration with faculty in academic units, and the need for a comprehensive and holistic approach to collection development as part of a programmatic approach to liaison services.

Content specialization and disciplinary knowledge has become increasingly important for liaison librarians in research institutions with liaison assignments to specific academic departments and programs. Barnik (2007) points out the importance of librarians being able to discuss disciplinary content with collegiate faculty. Leach (2008), focusing on STEM disciplines, demonstrates the advantages for creating disciplinary competencies for librarians engaging in subject-specific collection development.

Recent literature also emphasizes the need for incorporating both quantitative and qualitative assessment into collection development programs. Behr and Hill (2012) demonstrate how assessment, especially data-driven quantitative measures, can provide important information to drive decisions about collection content and focus. Black and Schleper (2005) discuss how assessment can inform the creation of a complete collection development program. Wisneski (2008) writes about the need for a programmatic approach to develop the skills of new collections librarians and offers a framework for creating such a program.

Technology increasingly influences collection development. Topics such as ebook functionality, licensing of copyrighted materials, and access to and storage of online content confront collections librarians. Robles-Smith and Way (2006) provide an overview of the most pressing digital collections issues facing liaison librarians. Sfakakis and Kapidakis (2002) offer models for incorporating metrics into assessment of digital content and make recommendations for using data-driven decision making in online research collections.

Liaison librarians by definition collaborate with collegiate faculty. Recent profession literature discusses the importance of this collaboration and provides recommendations for creating programs of outreach and engagement. Chu describes one model for faculty-librarian interaction in a "loosely-coupled" system (1995). Martin et al. (2009) provide guidelines for collaboration across academic units to create a culture of collections assessment throughout the university. Mack (2007) offers an open-systems model of how collections librarians interact with internal and external forces within the academy.

Libraries must combine collection development with other liaison activities into a comprehensive liaison program. Bodi and Maier-O'Shea (2005) describe the place of collection development within the emerging postmodern university. Stoller (2005) emphasizes the importance of keeping users central to any program of collection development.

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REFERENCE AND RESEARCH CONSULTING AND MENTORING

In 2011 Libraries Information and Research Services Team (IRST) have done an extensive study of the Reference and Research services, which can be found in libi, http://libi.lib.umd.edu/sites/default/files/Study%20of%20the%20Libraries%20Information%20and%20Research%20Services%20Rev%20092611.pdf. This report contains an extensive literature review on the topic of reference and a bibliography on the subject. In addition to literature review and bibliography the IRST report also contains environmental scan of peer institutions and of our own services. The report specifically talks about changing role of librarians in regards to general and subject reference, and proposes some alternative models. This report was widely circulated and vetted among subject librarians and staff, and it was unanimously accepted as is.

 Much has been written since the 2011 IRST Report on reference services. However although there are infinitely many more new articles, they are more of the same as in the literature review and bibliography of the IRST report. This new material fully supports and reinforces the conclusions in IRST Report.   The general trends and attitudes of what subject librarians work should be doing continues in the direction of more subject specialization; different ways of embedment in assigned departments; outreach and marketing; better use of technology for connectivity to students and faculty particularly in the area of referrals and accessibility; and the overreaching emphasis on learning.

As in 2011 there are different options and variations of reference/information models, with similar trends towards dramatic decline of traditional reference services, limiting subject librarians' time on the physical information desk, increasing referral services for in-depth reference questions, merging circulation and reference, creating scholars commons, adding various IT and other non-traditional library services, providing more virtual opportunities, constantly assessing and evaluating needs for the development of new services, and creating better learning environments for all kinds of patrons.

The conclusion is both simple and complex at the same time. Each library is left to define its own reference model that better fit it educational goals, campus environment and patron needs.

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TEACHING, LEARNING AND LITERACIES

Librarians are involved in instruction through face-to-face, online, and/or blended classes in areas of their specialty, as well as in general, core and other courses. They offer training on databases, research tools, bibliographic management programs, and in other specific areas to support education and research in the academic units. Technological advancements coupled with drastic changes in users' information needs and expectations are having a great impact on library instruction. The existing information literacy models are outdated, as undergraduate students are more technologically savvy, and their expectations are higher.

Librarians should avoid developing a library-centric program and should set information literacy discourse within a framework that is relevant and valuable to classroom faculty and align it with the educational goals and mission of the institution. Some experts considered the possibility that librarians

could be marginalized or replaced under certain circumstances, as improved information retrieval systems would render many information literacy skills obsolete, and faculty would take over the higher-order abilities of integration and ethical uses of information. Outcomes assessment will become a major requirement in higher education, and appropriate quantitative and qualitative tools need to be developed in order to determine whether students are achieving institutional learning outcomes from library instruction, as identified in the curriculum.

Moving away from a traditional model of "containers for information" toward "platforms for learning," libraries will become more involved in the educational and research processes. Librarians should move away from the focus on information retrieval skills in favor of the more complex areas of information literacy. This requires that they adopt new roles, new identities, new responsibilities, and new attitudes. By spending time in a particular academic community, librarians will be able to gain a first-hand understanding of the educational processes that will help them in assessing the needs and expectations in the different disciplines and academic units. Librarians need to re-imagine their role — instead of finding new ways of adapting old services to new needs, they need to adopt new models (even ones that are borrowed from other domains).

Major obstacles for librarians' involvement in instruction to overcome will be faculty attitudes, lack of subject expertise and technical skills, and a constantly changing dynamic environment that requires life-long learning. They should keep abreast of the educational initiatives of the University and examine how students experience the discipline. For librarians to be truly integrated into the curriculum rather than offering one-shot sessions, they must have much more pedagogical and theoretical knowledge.

Teaching will be the perfect vehicle to closely integrate the libraries in the educational and research environment and align them with the strategic goals of the institution. It will also be of major importance for bringing the libraries to the attention of researchers, students, and administrators, and this will have a profound effect on how librarians will be viewed by the academic community.

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OUTREACH AND ENGAGEMENT

The expanding role of liaisons are characterized as a more outward-looking perspective and complexity, emphasizing stronger involvement and partnership with the faculty and direct engagement in the University's teaching, service and research programs. (Rodwell 2008) Recent research into faculty satisfaction with library liaisons and services demonstrate a national trend where faculty report a significant and consistent rise in desires and expectations for library-provided online tools and websites, even as student user groups show declining or leveling expectations. Rising faculty expectations highlight the importance of strengthening communication and connection with faculty. (Carlson Nicol 2012) Higher levels of perceived success and satisfaction in the liaison relationship are coupled with recent contact with a faculty member, i.e. faculty who had recent contact of any kind with the liaison were more satisfied with the liaison services than those whose contact was long ago. According to studies of faculty, elements of successful outreach are providing services, being responsive to requests, having expertise in the discipline and its publications, knowing the department and being visible. (Arendt 2012)

A relationship-building approach to liaison work leading to iterative collaborations with faculty over time is recommended. The model has three stages: recognizing events as opportunities, developing those opportunities into relationships, and cultivating those relationships through collaborative projects that can improve student learning and scholarship through synergistic outcomes. (Hyun-Duck 2010) Using the library as the subject of study is a rich way for liaisons to participate in collaborative projects. For example, an MBA class develops a promotional plan to increase awareness of library services, the liaison approaches the instructor to participate in a collaborative project, together they develop a case study scenario, the liaison interacts with students to insure successful project results, participates in presentations of their findings, and ultimately takes the recommendations presented and turns them into an actionable plan for the library. (Dubicki 2009)

Liaisons are engaging broadly with their campuses. One service, a recurring workshop on grant resources, in collaboration between the library and the Office of the Vice President for Research, was described as one example of broad institutional engagement. (Delserone 2010) The liaison relationship is being adapted and expanded to serve nonacademic units as well, resulting in opportunities for broader campus collaboration. (Dahl 2007) Libraries are experimenting with outposting, or embedding, situating librarians in alternate venues on campus, such as student unions, residence halls, and faculty departments. (Rudin 2008) Many case studies describe the variations that have evolved at different

institutions, e.g., "Speaking of Books… Conversations with Campus Authors," is presented as an effective way to build bridges. (Hackman 2009)

Outreach to undergraduates is a common topic. Collaboration with Student Affairs Divisions provides opportunities to gather broad student input and to communicate directly with this population. (Crowe 2010) One example is the Personal Librarian program, targeted to make personal connections with each first year student being contacted by a librarian to explain the assistance offered by a personal librarian. (Dillon 2011) Another is serving as First Year Experience advisors, the advantage of which is to directly communicate with students. (Kelleher 2009)

Implications, challenges and benefits of academic libraries' presence in commercially owned social media spaces is widely discussed (Lilburn 2012) Implementation of web 2.0 tools requires commitment to continued resources. Common recommendations are to discern whether these technology-based services are value-added and that the needed resources are committed to. (De Jager-Loftus 2009)

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SCHOLARLY COMMUNICATIONS, INFORMATION TECHNOLOGY, AND RESEARCH DATA SERVICES

Reforming the scholarly communication system and advocating for Open Access have become core responsibilities for liaisons.(Malenfant 2010) Success is enhanced by liaison development focused on gaining an understanding and expertise, especially at the disciplinary level, necessary to educate faculty in the issues surrounding scholarly communications. (Kirchner 2009) Liaison tasks are migrating from purchasing materials to curating content. (Lewis 2007) In the past, discussions of scholarly communication focused on new technologies. Currently, changing user needs, different organizational structures, new kinds of jobs, and partnerships among the key organizations are the topics liaisons should attend to. Research libraries are positioned to provide both the platform and the skills needed to create new forms of scholarship and to disseminate that content. (Wittenberg 2008)

Formal scholarly publishing is characterized by a process of selection, editing, printing and distribution of an author's content by an intermediary (preferably one with some name recognition), this type of scholarship is easily measured by tenure review committees using ISI bibliometrics. The range and importance of informal scholarly publication, content that hasn't passed through these processes, has become pervasive due to information technology. Increasingly used to share and find information, boundaries between formal and informal have blurred. These changes in the behavior of scholars make tenure evaluation difficult. (Brown 2007) Several web-based impact measure alternatives have emerged. Known as altmetrics, webometrics, or cybermetrics liaisons need to be able to advice on their use. Examples include: Google Scholar Citations, a service wherein authors can make profiles that manage, calculate, and track citation data; SCImago Journal Rank (SJR) and Source Normalized Impact per Paper (SNIP), two metrics calculated through SCIIMAGO, a free Web site that functions on Scopus. (Roemer 2012)

Scholarly communication is often conflated with Open Access (OA) advocacy. Institutional repositories (IR) have been a powerful agent for OA by enhancing access to traditional scholarly content. IR's can support new practices of scholarship that emphasize data. They have structured diffuse efforts to capture and disseminate learning and teaching materials, symposia and performances, and related documentation of the intellectual life of universities. (Lynch 2003) The management of rights and permissions is an essential IR task. To facilitate content processing, copyright directories like SHERPA/RoMEO have been community built. Liaisons may have an important role to play by contributing data to these directories. (Hanlon 2011)

On the governmental side, three trends have had impact on OA: textbooks, favorable court decisions

on fair use, and funding mandates. The OA textbook movement has gained legislative interest as a strategy to keep higher education affordable. (OATTF 2010) Scholars' acceptance of OA publishing has had a liberalizing affect on publisher's business models. (AAUP 2011) The 2012 ruling on *Cambridge University Press et al. v. Patton et al.* was a fair use victory. (Davis 2012) Campus mandates for self-archiving is widespread, but the major shift has been created by funding agency mandates that requires shared access to research results and its supporting data.(Xia 2012) These data are increasingly linked to publications and related resources, thereby making sharing inexorably linked to scholarship itself. (Nicholson 2011) eResearch, which refers to the development of, and the support for, advanced information and computational technologies to enhance all phases of research processes, is related. Its rise has redirected liaison attention to curating digital research information. (Luce 2008) Digital libraries are becoming core instruments for serving a large class of applications necessary for eResearch. (Castelli 2006) Digital curation refers to a set of interdisciplinary activities, which deals with the need to use, create, and manage digital assets. Digital curation is becoming a function of liaisons. (Kunda 2011)

University libraries are positioned to become major digital publishers. (Walters 2012) One example is the HathiTrust, facilitating the wide sharing of resources whether print or digital materials, prospective or retrospective holdings, general or special collections. (Pritchard 2012)   Another example is library publishing services (LPS), often driven by university library desire to transform publishing. Models of LPS include: libraries as robust publishing competitors, libraries as specialized publishers, libraries as cooperative publishers, and libraries as curators and consultants in publishing. (Walters 2012)

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APPENDIX II: ENVIRONMENTAL SCAN

The Liaison Task Force performed an environmental scan by contacting like research libraries that we anticipated had liaison programs. Nine institutions were chosen:
- Arizona State University (ASU)
- George Mason University (GMU)
- Indiana University, Bloomington (IUB)
- Massachusetts Institute of Technology (MIT)
- Penn State University (PSU)
- Stanford University (Stanford)
- University of Illinois at Urbana-Champaign (UIUC)
- University of California, Berkley (Berkley)
- University of Minnesota (UMN)

Each institute was surveyed:
- Do they have a formal liaison/subject librarians program?
- What type of documentation have they created for the program?
- How do they perform assessment of liaisons and the program?
- What tools have they created and use?
- Do they have a reward system?

Findings and Analysis

Description

2 private, 7 public research university library systems ranging in size and complexity from 4 libraries on 3 campuses (GMU) to "several dozen libraries throughout campus, over a dozen subject specialty libraries, eleven affiliated libraries and high density storage facilities." (Berkeley) Some systems had Law libraries, but these seem to be separated administratively from the main library system.

Formal Liaison Program

All libraries surveyed had a liaison program: 8 Universities had a formal liaison program and 1 (ASU) has a *de facto* but informal system.

Award-winning Program

Only 1 library, Minnesota, reported being an award winning program. Their distinction was recognized by the ACRL Excellence in Academic Libraries Award (http://www.arl.org/bm~doc/rli-265-williams.pdf). Although, its Liaison program hasn't been recognized with awards, Stanford Libraries do offer a Stanford Prize for Innovation in Research Libraries (SPIRL), whose purpose is to recognize and celebrate innovation through programs, projects, and/or new or improved services that directly or indirectly benefit readers and users (http://library.stanford.edu/prizes/spirl).

Website Presence

All surveyed libraries had a webpage dedicated to listing subject librarians (see individual listings below for links). Minnesota had the most robust presence, with consistent presence of links to subject librarians throughout services web pages on the libraries website, e.g., https://www.lib.umn.edu/researchsupport. Penn State has a very impressive brochure: http://www.libraries.psu.edu/content/dam/psul/up/rcr/documents/RCR_Subject_Specialist_Liaison_Brochure.pdf. Although not a surveyed library, the Winona State Library's liaison page was also noted: http://www.winona.edu/library/liaisons/.

Inclusive of Branch Librarians

8 Libraries include Branch Librarians in their Liaison Program and identify them as subject librarians/liaisons. 1 library didn't supply that information (UMN). MIT reports that after their recent reorganization and the creation of a Liaison Department, "liaisons are no longer by library, all in one department now." Stanford has a separate a separate reporting structure for science libraries.

Liaison Librarian or Coordinator

All surveyed libraries accounted for liaison coordination. 7 libraries have a designated centralized Liaison Librarian/Coordinator/Leadership Team and 2 followed a distributed model (Illinois, Stanford). The Liaison Leadership team at GMU consists of Head of Fenwick Reference, Chair; Head of Collection Development; and Preservation; and Head of Educational Services. The prevalent model is to have 3 subject groups: Arts, Sciences, and Social Sciences. Humanities are sometimes joined with Arts and other times with Social Sciences. These subject groups are variously structured as teams, councils, or communities of practice. Along with subject groups the model includes a matrix with functional groups: Reference/Research Services, Teaching/Learning Services, Academic Programs Services, and Collections & Scholarly Research Services. These functional groups are variously structured as teams, workgroups, departments, or councils. MIT reported also having "a few interdisciplinary groups that cross communities of practice that focus on areas of priority for MIT."

Organizational Reporting

6 libraries supplied information on how liaisons fit in the organizational chart, 3 did not supply this information (Berkeley, UMN, UIUC). There is no clear pattern. Of the 6 that did supply information, 2 ultimately reported to the Head of Public Services (GMU, MIT), 1 reported to the director of Reference, Collections & Research Department (PSU), 1 organized reporting between Public Services and Science/Engineering Libraries (Stanford), 2 are spread among different library divisions (ASU, IUB).

Collection Management Librarian or Coordinator

All 9 libraries reported having collection services. These services were variously termed collection development, collection management or collection services. 8 libraries reported having a single designated Collection Development/Management Librarian/Coordinator, 2 of which reported also having a Collection Development Committee to coordinate work (UIUC, Berkeley). 1 library combined the Collection Management Coordinator position with Scholarly Communications (ASU), another combined it with Public Services and Research Services (PSU) and yet another reports sharing the responsibility between the Director of Collections and the Director for Public Services (Berkeley). 1 library reported a distributed model (Stanford) whose liaison system, in place for decades, grew out of Collections and is still heavily weighted towards collections (some titles are still bibliographer).

Reference Librarian or Coordinator

All 9 libraries reported having reference services. These services were variously termed reference services, research services, general reference, or reference and research services. 7 libraries reported having a designated reference/research services coordinator. 2 reported this being the *ex officio* duty as chair/leader of a reference/research functional group (ASU, Berkeley). 1 reported this being a separate department head (IUB). 2 followed a distributed model (GMU, Stanford). GMU designated the head librarian for each of its libraries.

Instruction Librarian or Coordinator

All 9 libraries reported having instruction services however, 1 did not have a coordinator (IUB). These services were variously termed teaching and learning services, library learning services, instruction

services, or information literacy & instruction services. 7 libraries reported having a designated coordinator for instructional services. 2 were *ex officio* duties as chair/leader of a functional group (ASU, Berkeley). 1 followed a distributed model (Stanford).

Scholarly Communications Librarian or Coordinator

9 libraries reported having scholarly research services however, 2 did not have a coordinator, but did have a substantial web presence (Berkeley, Stanford). See individual listings below for links to other scholarly communication web pages. These services were variously termed scholarly communication, scholarly communications, collections & scholarly communications, scholarly communication & publishing issues, scholarly publishing & licensing, publishing & curation services, or copyright resources. 2 libraries reported placing these services under Information Technology (GMU, UIUC). 3 reported placing these under Collections (ASU, Berkeley, IUB). 1 library reported placing it in Technical Services (MIT). 1 library reported a unique their separate division for Research and Scholarly Communication (PSU). 1 library reports scholarly communications as under liaison job responsibilities (UMN).

Outreach Librarian or Coordinator

5 libraries reported having outreach services (GMU, MIT, PSU, Stanford, UMN), indicating a trend towards recognition of outreach as a function of liaison services. There was no pattern as to where these were specifically placed organizationally, but all were within the realm of liaison services. 1 library reported outreach coordination services were *ex officio* part of the Head of the Liaison Department's job responsibilities (MIT). 1 library reported it as *ex officio* part of the Library Learning Services Leader's (instruction) responsibilities (PSU). 1 library reported these responsibilities were held by the Director of Communications & Development (Stanford). 4 libraries did not supply information on an Outreach Coordinator (ASU, IUB, Berkeley, UIUC)

Specific Training Programs

6 libraries reported having specific training programs for liaisons. 3 did not supply information on training (UIB, Stanford, Berkeley). Models for training varied. 3 libraries supplied links for wikis, toolkits, libguides, handbooks (GMU, PSU, UIUC). See individual listings below for links. 2 libraries supplied specific models:

- ASU
  - Regular Subject Librarians meetings
  - Email distribution list for quickly resolving daily issues
  - Initiate outreach programs
  - dynamic list of subject librarians on homepage
- MIT
  - Structured activities
  - Working sessions to review assessment
  - Structured plan for the broader organization to assist with common targets, facilitates individual creativity on the things that really matter to their specific communities.

Subject Librarian Liaison Job Description

7 libraries reported having specific job descriptions for liaisons, 5 supplied samples (IUB, MIT, PSU, UIUC, UMN). See *Appendix V: Sample Liaison Job Descriptions* for copies. 1 library, which didn't supply a sample, stated "Subject librarian's job descriptions are created by the individual manager for each unit" (ASU). 1 library added "almost all subject librarians have advanced degrees in a subject area, in addition to MLS; there are quite a few with PhDs; there are full- and part- time subject

librarians; some catalogers also have subject responsibilities" (IUB). 2 libraries did not supply descriptions (Stanford, Berkeley).

Best Practices Documentation

6 libraries reported having best practices documentation, 1 supplied a link to a toolshed (GMU, http://infoguides.gmu.edu/toolshed), 1 was embedded within their job description (UMN). See Appendix VI: Sample Best Practices for copies of the documents supplied (MIT, PSU, Berkeley, UIUC). 3 libraries did not supply documentation (ASU, IUB, Stanford).

Assessment/Evaluation tools

7 libraries reported having an assessment program for liaisons. 6 reported having either an Assessment Librarian or a team who coordinated efforts (ASU, GMU, IUB, MIT, Berkeley, UIUC). 1 library reported assessment was part of the annual merit award process. 2 libraries did not supply information (PSU, Stanford). 1 library supplied a particularly good model for assessment (UIUC, http://www.library.illinois.edu/assessment/index.html). Reported Models for assessment included:

- Triennial survey that captures how aware our community is about various services on offer and also how important those services are to them. Using data from these surveys to inform strategic goal setting (http://libguides.mit.edu/mitlibrarysurveys)
- LibQUAL+, and other library-wide assessments.
- Web usability, and other *alt-metrics*
- Tracking reference transactions, tools included LibAnswers
- Evaluate teaching performance
- Reporting instruction sessions, including data on attendance, prep time
- When goals are set, assessment plans are put in place
- Annual Self-evaluation and performance evaluation

Reward System

4 libraries reported having some type of reward system for excellent liaison performance. 5 libraries did not supply information (IUB, S, B, UIUC, UMN). 1 library stated that there was nothing separate from the annual merit award at the discretion of the supervisor (ASU). 1 library reported that subject team leaders receive a stipend and are appointed for 2 years (GMU). 2 libraries reported other rewards beyond the merit and stipend model (MIT, PSU). These models included:

- Annual recognition in the "Awards, Distinguished Honors, and Special Recognition" section of the liaison program brochure (Endowed Faculty Positions/Distinguished Librarians, Faculty Achievement Awards, National Offices in Professional Organizations, Editorships, Librarians with Academic Appointments in Other Penn State Colleges)
- End-of-the semester celebrations; a library-wide rewards and recognition program.

Arizona State University

Description: Eight Libraries plus high-density storage facility. ASUL Fact Sheet

Formal Liaison Program: No, but are trying to build something that would function that way; Informal structure is organized by a User Services Council who develop initiatives that rely on subject librarians including: promotion and guidance on the use of institutional digital repository, support for research data management, a working group related to the functioning of the Electronic Resource Management system, and selection of electronic resource purchases, etc.; Council is made up of 4 workgroups: Academic Program Services; Teaching & Learning Services Workgroup; Research Services Workgroup; and Collections & Scholarly Communications

Liaison Librarian or Coordinator Yes, Academic Program Services Librarian

Collection Management Librarian or Coordinator Yes, combined with Scholarly Communications

Reference Librarian or Coordinator Yes, Research Services Workgroup Co-Chairs

Instruction Librarian or Coordinator Yes, Teaching & Learning Services Workgroup Chair

Scholarly communications Librarian or Coordinator Yes, combined with Collections, http://lib.asu.edu/colldev/

Outreach Librarian or Coordinator No

Inclusive of Branch Librarians: Yes

Organizational Reporting: Subject Librarians report to five different managers;

Website presence http://lib.asu.edu/librarians

Specific training program:

- Regular Subject Librarians meetings

- Email distribution list for quickly resolving daily issues

- Initiate outreach programs

- dynamic list of subject librarians on homepage

Liaison job description: Subject librarians' job descriptions are created by the individual manager for each unit

Best Practices documentation No

Assessment/Evaluation tools: ASU's User Services Council Teaching & Learning Services Workgroup works on assessments for instruction; Librarians track reference transactions and instruction sessions, including how many students were in each session, prep time required, etc.; most other documentation of activities is in the annual self-evaluation; subject librarians performance evaluation done by departmental supervisors

Award-winning program, best practices, etc. No

Reward System: Yes, annual merit award at the discretion of supervisor

George Mason University

Description: 4 libraries on 3 campuses, plus the administratively separate Law Library

Formal liaison program   Yes; Liaison Librarian Teams http://library.gmu.edu/about/ul/liais.php. Initial liaison assignments are made by the University Librarian based on the job description and to best match current librarians' expertise, abilities, and subject interests as well as the Libraries' overall service goals and needs.

Liaison Librarian or Coordinator   Yes, Liaison Program Leadership Team (Head of Fenwick Reference, Chair; Head of Collection Development/Preservation; and Head of Educational Services).

Collection Management Librarian or Coordinator Yes, Librarian

Reference Librarian or Coordinator Yes, Librarian for each of its libraries

Instruction Librarian or Coordinator Yes, Coordinator

Scholarly communications Librarian or Coordinator Yes, http://gmutant.gmu.edu/copyright/, Digital Programs and Systems Division

Outreach Librarian or Coordinator Yes

Inclusive of Branch Librarians Yes, except Law

Organizational Reporting Liaisons are split into 3 broad subject teams each with a Team Leader, report to individual supervisors, ultimately reporting to the AUL/Public Services. Liaison Teams will be asked to do the following, operationally: hold monthly meetings, identify action plans for each year, to be vetted by the Liaison Program Leadership Team (Head of Fenwick Reference, Chair; Head of Collection Development; and Preservation; and Head of Educational Services), and the University Librarians' Council, and report on its projects at the end of each fiscal year.

Website presence http://library.gmu.edu/research/liais.html

Award-winning program, best practices, etc. No

Specific training program http://infoguides.gmu.edu/toolshed

Liaison job description Yes, examples not provided

Best Practices documentation http://infoguides.gmu.edu/toolshed

Assessment/Evaluation tools Assessment and Planning Coordinator

Reward System: Team Leaders receive a stipend, appointed for two-year terms.

Indiana University, Bloomington

Description: The Wells Library is the center of a multi-library system. There are 15 branch libraries and 11 departmental libraries. There are 3 subject teams: Arts, Sciences, and Humanities & Social Sciences.

Formal liaison program Yes, http://www.libraries.iub.edu/index.php?pageId=301

Liaison Librarian or Coordinator Yes

Collection Management Librarian or Coordinator Yes

Reference Librarian or Coordinator Yes, there is a reference department; half of the librarians are subject librarians, half are general reference librarians

Instruction Librarian or Coordinator No

Scholarly communications Librarian or Coordinator Yes, under Collections; http://www.libraries.iub.edu/index.php?pageId=7708; the University has also opened an Office of Scholarly Publishing at the IU Press

Outreach Librarian or Coordinator No

Inclusive of Branch Librarians Yes

Organizational Reporting Subject librarians/liaisons are involved in collection management and instruction. There is a separate Teaching & Learning department that includes some of the subject librarians, there is a team of librarians who teach bibliographic management programs, each one responsible for a particular program. There are liaisons who are attached to specific programs, rather than to academic units; subject is considered more important than the academic unit. eScience librarians are currently associated with the hard sciences; there are talks that a position will be created also for the social sciences.

Website presence http://www.libraries.iub.edu/index.php?pageId=301; http://www.libraries.iub.edu/index.php?pageId=1879

Award-winning program, best practices, etc. No

Specific training program Not supplied

Liaison job description Yes, Appendix V: Sample Liaison Job Descriptions; almost all subject librarians have advanced degrees in a subject area, in addition to MLS; there are quite a few with PhDs; there are full- and part- time subject librarians; some catalogers also have subject responsibilities

Best Practices documentation Not supplied

Assessment/Evaluation tools Have an Assessment Librarian; evaluate teaching; plan to use LibAnswers

Reward System: Not supplied

Massachusetts Institute of Technology

Description: 6 libraries & 1 storage facility

Formal liaison program: Yes

Liaison Librarian or Coordinator Yes

Collection Management Librarian or Coordinator Yes

Reference Librarian or Coordinator Yes

Instruction Librarian or Coordinator Yes

Scholarly Communication Librarian or Coordinator Yes, http://libraries.mit.edu/sites/scholarly/

Outreach Librarian or Coordinator Yes, part of the Liaison Coordinator role

Inclusive of Branch Librarians Yes, liaisons are no longer by library, all in one department now.

Organizational Reporting There are 3 Communities of Practice that bring together liaisons that serve groups, there are also a few interdisciplinary groups that cross communities of practice that focus on areas of priority for MIT. The coordinators of the Communities of Practice report to the Head of the Liaison Department.

Website presence http://libguides.mit.edu/content.php?pid=110460&sid=1111745

Award-winning program, best practices, etc. Not supplied

Specific training program

- Structured activities that enable all liaisons to accomplish certain tasks, e.g., set a goal for each liaison to analyze the most recent survey results for their academic departments and to identify at least three outreach gaps to be acted upon within a certain period of time.
- Working sessions where liaisons get together and go through the survey results and identify gaps, after discussion, identify common areas that can be addressed by a group effort such as creating marketing plans and activities.
- Setting goals and things to focus on, having a structured plan to rely on, enabling individual liaisons to get the work done. This facilitates individual creativity on the things that really matter to their community, and rely on the organization to assist with common targets.

Liaison job description See Appendix V: Sample Liaison Job Description

Best Practices documentation See Appendix VI: Sample Liaison Best Practices

Assessment/Evaluation tools Modes of assessment:

- triennial survey that captures how aware our community is about various services we offer and also how important those services are to them.
- When goals are set, assessment plans are put in place. No comprehensive, systematic assessment plan is in place, but are using data to inform what goals are chosen to put in place.

Reward System: Regular merit awards, performance review and goal setting process; end-of-the semester celebrations; a library-wide rewards and recognition program.

Penn State University, University Park Campus

Description: 7 Libraries on the University Park Campus and two administratively separate Libraries (Law and Medicine)

Formal liaison program Yes, includes only the 11 subject libraries within the Dept. of Reference, Collections and Research at University Park, and does not include the other commonwealth campuses, the law library or the medical library.

Liaison Librarian or Coordinator Reference, Collections & Research Department

Collection Management Librarian or Coordinator Reference, Collections & Research Department

Reference Librarian or Coordinator Reference, Collections & Research Department

Instruction Librarian or Coordinator Yes, Library Learning Services

Scholarly Communication Librarian or Coordinator Yes, under Associate Dean for Research and Scholarly Communications, https://www.libraries.psu.edu/psul/pubcur.html

Outreach Librarian or Coordinator Under Library Learning Services

Inclusive of Branch Librarians Yes

Organizational Reporting Reference, Collections & Research Department

Website presence
http://www.libraries.psu.edu/content/dam/psul/up/rcr/documents/RCR_Subject_Specialist_Liaison_Brochure.pdf

Award-winning program, best practices, etc. Not supplied

Specific training program

- Instruction http://www.libraries.psu.edu/psul/lls/toolkit.html
- Reference, Collections http://www.libraries.psu.edu/psul/rcr/training.html

Liaison job description See Appendix V: Sample Liaison Job Descriptions

Best Practices documentation See Appendix VI: Sample Best Practices

Assessment/Evaluation tools Not supplied

Reward System: Yes, annually recognized for achievements in the "Awards, Distinguished Honors, and Special Recognition" section of the annual brochure. Achievements highlighted include Endowed Faculty Positions/Distinguished Librarians, Faculty Achievement Awards, National Offices in Professional Organizations, Editorships, and Librarians with Academic Appointments in Other Penn State Colleges, and a listing of Research Centers and Institutes.

Stanford University

Description: The Stanford University Libraries include Green Library (the main campus library), Meyer Library (technology services & study spaces), 14 specialized branch and department libraries, and 3 auxiliary libraries housing less-used or overflow materials. Five coordinate libraries, connected to graduate schools and other organizations have their own websites and policies. The collections of all these libraries are indexed in the main catalog. http://library.stanford.edu/libraries

Formal liaison program Yes, in place for decades, growing out of Collections and still heavily weighted towards collections (some titles are still bibliographers).

Liaison Librarian or Coordinator No, distributed

Collection Management Librarian or Coordinator No, distributed: Assistant University Librarian for Collection Development - Humanities and Social Sciences and Associate University Librarian for Science & Engineering

Reference Librarian or Coordinator No, distributed, there are quite a few librarians that are in a category called "General Reference"

Instruction Librarian or Coordinator No, distributed

Scholarly Communication Librarian or Coordinator Not supplied, http://www-sul.stanford.edu/scholarly_com/index.html

Outreach Librarian or Coordinator Yes, Director of Communications & Development

Inclusive of Branch Librarians Yes, but have a separate reporting structure (Assistant University Librarian for Public Services and Associate University Librarian for the Science and Engineering Libraries)

Organizational Reporting The organizational structure has changed over the years. The current structure is an Associate University Librarian for the Science and Engineering Libraries covers everything (library operations, services and collections); Assistant University Librarian for Collection Development - Humanities and Social Sciences, but performance is reviewed by the Assistant University Librarian for Public Services.

Website presence http://library.stanford.edu/people/subject-librarians

Award-winning program, best practices, etc. No, but offers the SPIRL prize, http://library.stanford.edu/prizes/spirl

Specific training program Not supplied

Liaison job description Not supplied

Best Practices documentation Not supplied

Assessment/Evaluation tools Not supplied

Reward System Not supplied

University of California, Berkley

Description: The Berkeley collection is housed in several dozen libraries throughout campus, over a dozen subject specialty libraries, and eleven affiliated libraries. Also, there is a high-density storage facilities.

Formal liaison program: Yes, 3 subject councils have representatives from every library unit that manages collections relevant to the subject of the council. It is envisioned that the subject councils will have more members than the function councils.

Liaison Librarian or Coordinator Yes, shared between Associate University Librarian/Director of Collections and Associate University Librarian and Director, Doe/Moffitt Libraries

Collection Management Librarian or Coordinator: Yes, Collection Services Council is Chaired by the Associate University Librarian and Director of Collections.

Reference Librarian or Coordinator Yes, Reference Services Group Leader

Instruction Librarian or Coordinator Yes, Instruction Services Group Leader

Scholarly Communication Librarian or Coordinator Not supplied, but has a web presence under collections: http://www.lib.berkeley.edu/scholarlycommunication/index.html

Outreach Librarian or Coordinator Not supplied

Inclusive of Branch Librarians Yes

Organizational Reporting Not supplied

Website presence: http://www.lib.berkeley.edu/Help/liaisons.html

Award-winning program, best practices, etc. No

Specific training program Not supplied

Liaison job description Not supplied

Best Practices documentation See Appendix VI: Sample Best Practices; http://www.lib.berkeley.edu/Help/pdfs/liaisonguidelines.pdf

Assessment/Evaluation tools Yes, http://www.lib.berkeley.edu/AboutLibrary/reports/refguide.html; http://www.lib.berkeley.edu/AboutLibrary/reports/CDPM_section_V0001.pdf; http://www.lib.berkeley.edu/AboutLibrary/reports/selectoreval.pdf

Reward System: Not Supplied

University of Illinois at Urbana-Champaign

Description: The Library is made up of more than 20 departmental or subject libraries. Some serve particular academic units, while others serve all units. All of the libraries share a single online catalog and all contribute materials to the Main Stacks. Some of the departmental libraries are located in the Main Library building, while others are located in other departments on campus.

Formal liaison program: Yes

Liaison Librarian or Coordinator No, distributed

Collection Management Librarian or Coordinator Yes, under Collections and have a Collection Development Committee

Reference Librarian or Coordinator Yes, http://www.library.illinois.edu/nsm/reference/ReferenceImplementationNSMFinalReport_070611.pdf

Instruction Librarian or Coordinator Yes, Coordinator for Information Literacy Services and Instruction

Scholarly Communication Librarian or Coordinator Yes, under the Office of Library Information Technology Policy and Planning http://www.library.illinois.edu/scholcomm/

Outreach Librarian or Coordinator No

Inclusive of Branch Librarians Yes

Organizational Reporting Not supplied

Website presence http://www.library.illinois.edu/administration/collections/subjectdirectory.html

Award-winning program, best practices, etc. No

Specific training program https://wiki.cites.uiuc.edu/wiki/display/libch/Collections+Handbook

Liaison job description See Appendix V: Sample Liaison Job Descriptions; http://www.library.illinois.edu/committee/exec/supplement/s2011-2012/Template_MenuofCoreRolesandResponsibilitiesSubjectSpecialistLibrarians.html

Best Practices documentation: See Appendix VI: Sample Best Practices http://www.library.illinois.edu/committee/exec/supplement/s2011-2012/SubjectSpecialistTaskForceReport.html

Assessment/Evaluation tools http://www.library.illinois.edu/assessment/index.html; have a coordinator for Assessment

Reward System Not supplied

University of Minnesota

Description: The University of Minnesota Libraries include 14 library facilities on the Twin Cities campus

Formal liaison program Yes

Liaison Librarian or Coordinator Yes

Collection Management Librarian or Coordinator Yes

Reference Librarian or Coordinator Yes

Instruction Librarian or Coordinator Yes

Scholarly Communication Librarian or Coordinator Yes, https://www.lib.umn.edu/scholcom/

Outreach Librarian or Coordinator Yes

Inclusive of Branch Librarians Not supplied

Organizational Reporting Not supplied

Website presence https://www.lib.umn.edu/about/selectors

Award-winning program, best practices, etc. Yes, ACRL Excellence in Academic Libraries Award,
http://www.arl.org/bm~doc/rli-265-williams.pdf

Specific training program Yes, examples not supplied

Liaison job description See Appendix V: Sample Liaison Job Descriptions

Best Practices documentation See job description

Assessment/Evaluation tools
http://wiki.lib.umn.edu/wupl/Administration.HomePage/2009%20ACRL%20Award%20Application.pdf

Reward System: Not supplied

INDIANA UNIVERSITY LIBRARIES

Bloomington, Indiana 47405

LIBRARY FACULTY POSITION DESCRIPTION FORM

Name: Years covered:
Position Title:
If other than full time, please indicate:
Campus: Bloomington
Library / Branch / Department: SALC
Immediate Supervisor(s):
Department Head:

I.   Primary Responsibilities:
        Collection Development and Management
- Select current and retrospective materials in all formats in *[list subject areas]* that support the teaching and research needs of the faculty and students of Indiana University. Use tools such as approval plans, review journals, publishers' catalogues, websites, and faculty recommendations to select materials.
- Manage materials budgets for materials in all formats: encumber funds expeditiously, monitor expenditures, and prepare annual budget requests. Communicate information about distributors, publishers, and other sources of supply to relevant staff in the Acquisitions Division.
- Establish and monitor approval plans as needed.
- Conduct evaluations of the collections to assess strengths and weaknesses and to enhance the collection by acquiring needed materials.
- Work closely with Technical Services and other library departments on matters related to acquisitions, cataloging, and special purchasing agreements.
- Work with the Preservation Department regarding bindery decisions, repair of damaged items, digitization, and other preservation and storage issues.
    - Select materials for transfer to offsite storage.
    - Identify and evaluate potential gifts and gift collections that will enhance the present collections. Review, assess and process gift materials. Make site visits to donors and assess materials.
    Reference and Instruction
- Provide reference service in person, by telephone, by mail and email to all users of the Indiana University Libraries, especially to IU faculty, students, and staff. Answer reference referrals from other units in the Libraries.
- Provide bibliographic instruction to classes in *[list subject areas]*. Participate in library-wide instructional programs.
- Prepare, update and maintain print and electronic guides to the collections.
- Maintain discipline-based and course-specific library web sites for *[list subject areas]*.
    Departmental Liaison
- Act as a liaison to *[number]* academic departments: develop and maintain working relationships with faculty and graduate students to anticipate needs and establish priorities; stay informed of developments in the departments; and inform department members about library issues.

II.   Secondary Responsibilities
    - Participate in the collective activities and services of the professional librarians at the IUB Libraries.
    - Participate in meetings of Subject and Area Librarians Council, the Public Services Council, the Collection Managers Council, the Library Faculty, and other relevant groups.
- Work cooperatively with all library departments and units to coordinate, deliver and promote services that improve the condition and availability of the collections.

- Attend workshops, seminars, and other informational work-related meetings as appropriate.
- Hire, train, supervise, and evaluate library staff, student employees, and graduate assistants supporting the needs and priorities of the position; monitor hourly budget.
- Participate in state, regional, national and international professional meetings or associations relevant to the responsibilities of this position.
- Perform other duties as assigned.

III. Qualifications

Required:

- ALA-accredited MLS, or equivalent combination of education and experience in an academic setting
- Graduate degree in appropriate field(s) or equivalent experience
- Bibliographic *[or reading]* knowledge of *[languages].*
- Experience in teaching or bibliographic instruction.
- Ability to meet the requirements of a tenure-track appointment.

Desirable:

- Academic library experience in collection development and/or public services
- Familiarity with electronic library resources and tools
- Understanding of the nature of scholarly research and publishing
- Excellent written and oral communications skills
- Good interpersonal skills

Revised 1/2005

MITLibraries
Description

HUMAN RESOURCES INFORMATION	
Job Title	*[to be completed by HR Administrator]*
Job Code	*[to be completed by HR Administrator]*
Payroll Category	*[to be completed by HR Administrator]*

LIBRARIES INFORMATION	
Recommended Position Title	
Department(s)	Liaisons for Departments, Labs, and Centers
Reports to	
% Effort (Admin) or Hours Per Week (Support)	
Incumbent	
Effective Date	

Job summary

This position is for a forward-looking and enterprising professional familiar with the use and communication of research information in Atmospheric and Oceanic Sciences, Energy and Environment, and Nuclear Science and Engineering to shape and deliver programs of reference, instruction, outreach, and resource selection and to serve as liaison to an active community of users involved in research and teaching at the leading edge of these fields.

Summary of Essential Job Functions

- Serve as the MIT Libraries expert on the research and learning culture and practices of the Atmospheric and Oceanic Sciences, Energy and Environment, and Nuclear Science and Engineering communities.
- Select and advocate for subject-specific research materials that serve the needs of the MIT community in collaboration with other appropriate groups and colleagues.
- Monitor and support interdisciplinary activities of an assigned community.
- Participate in communities of practice to support interdisciplinary needs of MIT Communities and to share and increase knowledge in support of liaison activities.
- Perform targeted communications to departments, labs and centers (DLC) to create awareness of available services and collections and actively work to maintain and build those connections.
- Seek out and channel feedback and input from the DLCs to the rest of the Library system for subsequent improvement and evolution of services.
- Participate in user needs studies and identify possible topics for new studies.
- Advocate for discipline-specific needs for services and collections within the Libraries and with vendors.

- Provide instruction within DLCs and in support of the Libraries' goals to ensure that scholars at every stage of their career understand and can effectively use the research resources at their disposal to increase their productivity and research success.
- Provide support for strategic scholarly publishing activities and provide services, such as recruitment of faculty authored research materials and promotion of repository-based services.
- Provide reference support to the MIT community, both targeted at a specific disciplinary community and in support of the MIT community as a whole, either independently, or in collaboration with colleagues.
- May coordinate the activities of subject-area community of practice including providing forums to support liaison work, assisting with liaison goal setting and performance feedback, participating in the management team for LDLC, communicating MIT community needs to the library system, propose and implement work processes for liaisons, and collaborate with other groups as needed.
- Participate actively in system-wide initiatives and serve on committees and task forces as needed.
- Communicate actively with fellow professionals through research, writing or presentations, and/or professional service activities.

Educational and Experience Requirements:

Required
- MLS/MLIS from an ALA-accredited institution or equivalent advanced degree in library or information science
- Demonstrated entrepreneurial approach to delivering service to a research community
- Knowledge, experience and capacity in providing services and resource selection for a research community
- Demonstrated experience or capacity in providing instructional services to a research community or to colleagues.
- Demonstrated interest in developing and maintaining relationships with user communities
- A collaborative approach to problem solving and working across organizational boundaries in service of user needs.
- Demonstrated interest and capacity to develop expertise in research literature and publishing practices in assigned areas.
- Independence and initiative in accomplishing liaison work.
- Facility, mastery and independent exploration of appropriate technologies in service of user needs.

Preferred
- An undergraduate or graduate degree in a field related to the communities supported.
- A deep understanding of the literature and information sources used within the supported communities, sufficient to provide high quality support to advanced students and researchers.
- Experience or training in marketing, teaching or publishing.
- Experience selecting and assessing print and digital research collections.
- Experience working with vendors of scholarly research products.
- Evidence of effective collaboration with faculty, colleagues, and students.

Physical Requirements

NA

Expectations for All Employees
As a member of the MIT community, supports MIT's Non-Discrimination Policy and respectfully interacts with other members in the community.

Expectations for Employees in Management Positions

As a member of the MIT management team, expected performance includes demonstration of certain accountabilities including leadership, developmental advising/mentoring, mentoring, communicating for results, strategic business sense, and resource management.

Disclaimer
The above statements are intended to describe the general nature and level of work being performed by people assigned to this classification. They are not to be construed as an exhaustive list of all responsibilities, duties, and skills required of personnel so classified. All personnel may be required to perform duties outside of their normal responsibilities from time to time, as needed.

Penn State
Subject Specialist Liaison Librarians

Librarians in the Department of Reference, Collections and Services serve as subject specialists with discipline-specific responsibilities for library collections and services, and as liaisons to academic units at Penn State. Our liaison librarians have responsibilities in these six areas:

Collections content and access:

Our librarians build, maintain, and facilitate assess to collections in all media and formats to support the research and teaching of their assigned academic units. Librarians actively engage in the transformation to a digital library while continuing excellent support for unique materials in physical formats. Liaison librarians also collaborate with librarians in other subject areas and other Penn State locations to create interdisciplinary collections supporting undergraduate education and advanced research.

Reference and research

Our librarians provide consulting and mentoring for general and subject-specific research at all levels in person, at library service points, and in the virtual world via e-communications and social networking. Librarians provide both general and subject specific reference assistance for undergraduate students, as well as individual consultations for advanced researchers.

Teaching, learning and literacies

Our librarians design and deliver a program of library instruction in their assigned subject areas and supporting the curriculum of their assigned academic units. Librarians also participate in general information literacy initiatives supporting undergraduate education. Our librarians collaborate with assigned academic units to create and implement subject-based research competencies supporting the undergraduate and graduate curriculum.

Liaison activities with assigned academic units

Our liaison librarians participate in the intellectual life of their assigned academic units. Librarians engage with faculty and students as colleagues and as mentors in disciplinary activities.   Liaison librarians also collaborate with their liaison units to create outstanding library services supporting their curricular and research needs.

Engagement and outreach with the University and beyond

Our librarians participate in outreach to the Libraries, to the University, to the community, and to the profession in development and fundraising, diversity initiatives, operations, faculty governance, and other areas of service.

Scholarly communications

Our librarians participate in scholarly communications initiatives. Librarians remain current about issues in digital scholarship, copyright, and research data management, and provide guidance in these areas. Librarians engage in academic and professional efforts supporting open access, e-publishing, and other scholarly communications initiatives.

Template/Menu of Core Roles and Responsibilities

Subject Specialist Librarians

This template is provided to facilitate the development of position announcements in the University Library for subject specialists. The roles and responsibilities are described in more detail in the report of the Subject Specialist Task Force. The items noted are believed to be realistic and achievable by most of those working as subject specialists. Other, more specific, responsibilities relating to subject assignments are not included in the list.

1. **Engagement**
    A. Displays a strong commitment to the University Library working in an engaged and collegial manner.
    B. Establishes meaningful and responsive contact with other members of the campus, especially within the liaison department.
    C. Maintains effective and active involvement within the professional community, including related professional associations.
    D. Participates in fundraising and grant-seeking opportunities as well as local community activities in the area of subject expertise.

2. **Reference**
    A. Provides effective, responsive reference service through all media – in-person, email, chat, phone, and other means that may be available as technology changes.
    B. Monitors and understands the most recent changes in the production of knowledge in the related subject discipline and the knowledge base as a whole.
    C. Provides reference tools in the form of written and electronic guides to the literature.
    D. Provides standardized office hours, either in the Library, the Department, or other areas that may be used by students and researchers.
    E. Documents and analyzes data concerning reference transactions with a view to defining and applying best practices in the discipline.

3. **Instruction**
    A. Actively participates in Library and library information resource instruction to the campus community
    B. Displays active commitment to improving personal instructional techniques
    C. Continually works on improving subject expertise

4. **Collection Development and Management**
    A. Selects material in relevant formats and languages to serve the research, teaching and learning needs of the University community.
    B. Manages collection funds effectively and in a timely manner.
    C. Develops skills with and knowledge of current technologies required for the collection development process.
    D. Analyzes collection characteristics and collection usage data to better serve users and keep up with research trends.
    E. Develops and maintains cooperative and constructive relationships and communicates when necessary.

F. Discovers and recruits institutional scholarly output, research data, and other content for inclusion in the Library's digital initiatives, scholarly communication programs, and special collections.

5. Professional Development

A. Attends and actively participates in professional development events
B. Monitors trends and initiatives in librarianship and in subject disciplines
C. Learns about new resources and services provided by the University Library and by the University.
D. Identifies and explores opportunities for providing new or improved services and tools to library users.
E. Shares discoveries with interested faculty, staff and students.
F. Gains and maintains competency with necessary tools.

Introduction to the Framework

In 2009 the U of M Libraries won the ACRL Excellence in Academic Libraries Award with an application entitled *The University of Minnesota Libraries: Changing the Paradigm.* The following excerpts from that application provide an excellent summary of the path we have been on since the Academic Programs Division restructured and created the first Position Description Framework in 2006.

> "In the last decade, new technologies have fueled fundamental shifts in the behavior and expectations of students and faculty. Digital content abounds and new forms of information access are evolving, giving rise to changes in the ways scholars communicate and disseminate their research. Libraries, traditionally focused on the *products* of scholarship, are now prompted to understand and support the *processes* of scholarship. The University of Minnesota Libraries have been a player in this paradigm shift, and are deeply engaged in the teaching, learning, and research processes."

> "Over the past several years, themes of engagement, of "getting in the flow of users," whether in virtual or physical contexts, have shaped the University of Minnesota Libraries' planning and activity. During this time, a shift in our vision and mission statements reflects the changing paradigm. Our current mission affirms that the library is no longer the center of the information universe; rather, its strategic advantage comes from a broader portfolio of assets: our expertise and value-added services have become paramount. The University Libraries have two roles: as leader in areas such as information literacy, copyright, and authors' rights and as provider of extraordinary information experiences — that is, engaging fundamentally in the lives of students, scholars, and citizens to improve individual productivity and the achievement of their goals."

> "Moving from a collection-centered model to an engagement-centered one does not happen overnight. Over several years, we have transformed the University Libraries' roles and reconceived essential infrastructure to support those roles."

Many of the new roles described above were integrated into librarian position descriptions in 2006 and we have made great progress in some areas. Positions descriptions are living documents that will be updated as needed to reflect new insights and changes in our environment.

As always, clear and current position descriptions, along with division and department goals, will help individuals write annual personal goals. Using the framework, directors and individuals will easily be able to create and update position descriptions. The framework is intended to help articulate both ongoing and new roles and responsibilities. This is why examples are included in a number of areas. The examples are illustrative, but not exclusive.

The Framework includes most significant work performed by librarians and reflects the critical roles we need to fulfill, but not every individual will do everything in the framework. Position descriptions will be designed in consultation with individuals; department directors have responsibility for the final document. As we expand into new roles, departments are encouraged to view the work as belonging to the department. In some cases, all individuals will still engage in the same work; in other cases, a department might choose to vest the lead role or most of the work in a particular arena with one or a few individuals who have particular skills or interest in that area. Departments should also keep in mind that in certain areas we have developed positions with expertise intended to serve as consultants

across the division. Examples of this include the Information Literacy Coordinator, the Grants Coordinator, and the Media Outreach and Learning Spaces Librarian.

Campus Engagement
- Actively engage with faculty, students, and staff in assigned areas, developing strong working relationships.
- Promote current services and collections.
- Be knowledgeable about and be able speak to a range of library issues, including scholarly communication, the emerging digital conservancy, the development of new online tools, and the integration of information literacy skills into the curriculum.
- Assess user needs to develop and maintain relevant, high-quality services and collections.
- Analyze trends in departmental teaching and research programs, stay abreast of scholarship in the disciplines themselves, and use this knowledge to respond to departmental needs.
- Seek opportunities to collaborate and establish partnerships with departments, including the creation of digital content and services. Examples include:
    o Collaborating with data producers and repository contributors to develop cost-effective and efficient strategies for managing data and information.
    o Seeking opportunities to partner with researchers in projects or grants that require intense information and data management.
- Examples of good interaction include:
    o Engaging in individual conversations, especially as we increase the amount of time we spend outside the Libraries, in departments, research centers, and areas in which students gather.
    o Seeking participation in departmental, college and campus committees.
    o Attending and presenting at departmental meetings, seminars, and colloquia
    o Forming and working with library advisory committees.

Content / Collections (Acquisition, Stewardship, Promotion)
Build and manage library collections in the subject areas of XXX:
- Systematically select material in all formats (print, manuscripts, digital, data sets, fixed and streaming multimedia), to serve the current and future research, teaching, and learning needs of University of Minnesota clientele.
- Explore new and collaborative approaches to collection development and management, considering new discovery and delivery mechanisms, constraints on physical space, and the need to ensure sustainable access to print and digital collections.
- Build on collections of distinction that may also serve regional, national and international users.
- Discover and recruit institutional scholarly output, research data and other content for inclusion in the University Libraries' digital initiatives.
- Manage collection funds efficiently, effectively and in a timely manner.
- Strategically assess and make decisions regarding the acquisition, retention and preservation of collections.
- Consult proactively with technical and access services staff on appropriate arrangement, description, cataloging and provision of access to traditional collections and electronic resources.
- Develop and maintain relationships with dealers and donors (of both in-kind and monetary gifts).

Teaching and Learning
- Actively engage with faculty and graduate teaching assistants as partners in programmatically integrating information literacy concepts and skills into the curriculum.
- Using sound instructional design practice, develop learning materials and instructional sessions in a variety of formats that teach students to:

- recognize information needs, create successful search strategies, and evaluate and effectively use information resources in all formats, including archival and other primary materials as well as secondary sources.
- understand the research and scholarly communication patterns of their chosen disciplines.
- understand the economic, social, and legal issues around the use of and access to information.
- Deliver effective instructional sessions as appropriate. Determine when it is more appropriate to have students use online tools; or to give learning materials to faculty and teaching assistants for their incorporation into class sessions.
- Conduct needs assessment as appropriate and selectively measure instructional outcomes in order to ensure effectiveness of instructional initiatives.
- Maintain an up-to-date knowledge of relevant University and department curriculum initiatives, in order to keep information literacy program consistent with University curriculum.
- Develop and manage physical and/or online learning spaces.

Scholarly Communication

- Educate and inform faculty, students, and campus administrators about scholarly communication issues. Examples include:
  - Helping faculty and graduate students to understand their rights as authors
  - Contributing content to copyright and/or scholarly communication web sites
  - Copyright
- Advocate for sustainable models of scholarly communication.
- Work closely with faculty and students to understand their changing workflows and patterns of scholarly communication; assist in the development and creation of tools and services to facilitate scholarly communication.
- Support and promote the University Digital Conservancy by
  - Helping administrators, faculty, and students understand the role of the UDC in building and preserving digital collections.
  - Working with faculty and departments to promote the UDC as a scholarly communication tool.
  - Assisting in content recruitment; Identifying digital resources that require long-term preservation and merit sustained access.
  - Helping to shape the infrastructure in which digital preservation and access can successfully evolve.

E-Scholarship and Digital Tools

- Identify areas where new online learning and digital tools can place the Libraries into the flow of teaching, learning and research.
- Collaborate in the design, implementation, and maintenance of online tools and services that meet the needs of discipline/interdisciplinary research communities.
- Actively participate in the coordination and integration of online tools in support of teaching, learning and research.
- Develop knowledge of current practice and future directions in e-scholarship and help to identify gaps in existing support.
- Participate in defining library roles in e-scholarship.

"Ask Us" Services

- Actively seek opportunities to provide customized or expert reference and research services, typically by appointment or referral, which include:
  - providing consultations that involve subject or other specialized areas of expertise (e.g., in-depth knowledge of copyright or scholarly communication issues or specific collections).
  - answering referred questions in all formats (chat, email, phone, desk/in-person) and individual / group consultations.

- applying knowledge of how research is conducted in certain disciplines.
- extending services such as mobile librarian activities, administrative research service, blog creation in partnership with departments, morning report type activities, etc.
- Provide high quality reference and research support <u>on demand</u>, typically at a walk-in desk, on email, or chat, by:
  - Providing assistance and one-to-one instruction in finding and evaluating information.
  - Providing assistance in accessing library resources and services.
  - Providing feedback about user success with resources and services.
  - Providing support in using information effectively in all formats.
  - Documenting and analyzing data on reference transactions, both at service points and for customized reference transactions.

Outreach

Contribute to the University of Minnesota's commitment to serve the citizens of Minnesota. Examples include:
- Seeking speaking engagements and other opportunities to address community groups to inform them of resources available to them.
- Seeking opportunities to address local, regional, and state government agencies, to foster better communication and understanding of each other's programs and services
- Pursuing partnerships with other organizations (e.g., libraries, library organizations, business community, etc.).
- Developing, maintaining and promoting services and resources that will benefit the broader community.

Fund Raising
- Identify potential projects / activities for grant funds; assist in the preparation of grant proposals. If appropriate, serve as principal investigator for a grant.
- Identify potential donors and work with the Libraries Development Office to cultivate donors as appropriate. Meet with existing donors to develop relationships.

Exhibit and Event Planning (Not all librarians will engage in this every year)
- Identify potential topics for exhibits or events that promote services or collections or support campus goals; share with appropriate planning bodies (Exhibits Committee, First Fridays Planning Committee, Events Planning Committee, etc.)
- Prepare exhibit content and mount exhibits.
- Plan and execute events.
- Work closely with Communication Office on publicity for exhibits and events.

Leadership
- Contribute to the goals and strategic initiatives of the Libraries through active participation in collaboratives, working groups and task forces.
- Manage projects and develop programs as assigned in consultation with sponsors, supervisors and other stakeholders.
- Share expertise with colleagues and administrators to further Libraries and University goals and strategic initiatives (leading from where you are within the organization).
- Facilitate successful group processes including meeting management, conflict resolution, and consensus building.

Management and Supervision (where applicable)
- Coordinate overall operational activities of [name of unit or library]; facilitating relationships with other groups in the Libraries, evaluating needs and processes, addressing staffing requirements, physical plant needs, and the implementation of policies and procedures.
- Provide direct supervision of [positions]. In consultation with department director write position descriptions, hire, assign job responsibilities, coach and mentor, conduct performance evaluations, and facilitate staff development and training opportunities.

- Prepare narrative and statistical reports for [name of unit or library] and prepare additional documentation on activities and progress as required. Prepare recommendations and proposals for long-range projections in terms of staffing, space and equipment, and collection facility needs.

Related Documents (available through AP Wiki):
Professional Expectations
Criteria for Continuous Appointment

MIT - Characteristics of an optimal liaison program (Updated 10/12/2011)

Having a common understanding of the characteristics of a successful liaison program creates a strong foundation for future planning and goal setting for LDLC as a whole. In addition, individual liaisons can use these items to inform themselves on how to focus their efforts for ever-greater success. While the lists below are ambitious and represent our aspirations for our entire liaison program, it is recognized that due to the inherent variability of practice within MIT departments, labs, and centers, as well as the range of levels of experience of our staff, liaisons will have achieved different levels of access and accomplishment within their communities, even given a common set of objectives. In addition, it is recognized that there are a range of responses possible to meet each of these items to constitute success, depending on the nature of the community. For instance, "strategically participate in DLC activities" could mean attending events sponsored by the department, all the way to collaborating on projects initiated by the department. The characteristics and needs of the community will define the types of activities that are appropriate for each dimension. The liaison program will provide tools and techniques for accomplishing these things.

Outreach
- Liaisons understand the research and teaching directions for their assigned communities, both emerging and waning interests, and how we can support those needs.
- MIT DLC communities are aware of library services.
- Liaisons have evidence for what library services are important to their communities and can articulate why.
- Liaisons can get meaningful and substantive feedback and input from their DLCs when needed.
- There is evidence that members of the assigned DLCs seek out their liaison when needed.
- Liaisons can articulate and provide evidence for effective methods for contacting and interacting with the community.
- Liaisons can identify key people in the department and their roles and have made contact with them (department head, academic officers, grad and undergrad administrators, communications staff, faculty in leadership positions (e.g. curriculum coordinators, etc.))
- Liaisons meet members of their community and strategically participate in DLC activities.
- Liaisons identify champions within the department and take steps to cultivate relationships.
- All new members of the department (including faculty, postdocs, newly declared sophomores, and graduate students) receive proactive communication from the liaison introducing them to relevant library services.
- Liaisons are highly responsive to inquiries from the MIT community.
- Liaisons implement robust methods to communicate updates with the department.
- Liaisons are continuously trying to build relationships in their DLCs.
- Liaisons share knowledge of their communities' needs for services across the library system as needed.
- Liaisons understand their community's needs in relation to the needs of other MIT communities and can effectively contribute to prioritization efforts.
- Liaisons understand their community's use of technology to support their information needs and can advocate for ways the Libraries can support them.
- Liaisons are mapped to every DLC
- Liaisons are knowledgeable and can speak to a range of information-related issues, including scholarly communication, repositories, information literacy skills, particularly as they relate to the needs of their community.

Reference & Instruction

- Members of the assigned DLCs seek out their liaison when needed for reference and instruction services.
- Liaisons provide timely and accurate reference assistance to faculty, students and staff.
- Liaisons collaborate within the system to provide excellent reference and instructional services, and have robust knowledge for when and to whom to refer questions.
- Liaisons have a plan for increasing their community's information literacy skills according to the needs of the community.
- Liaisons are proficient with information resources and tools used in their communities. They stay up-to-date with changes to content and interfaces.
- Liaisons answer questions knowledgeably about Libraries' challenges, initiatives, staff roles and services.
- Other liaisons/colleagues are available for instruction on advanced or specialized topics.
- Liaisons develop and maintain information discovery tools for their communities.
- Liaisons, using sound instructional design practice, develop learning materials and instructional sessions in a variety of formats to further the Libraries' goals for instruction.
- Liaisons deliver effective instructional sessions as appropriate.

Collections
- Liaisons document materials needed by the department and select or proactively advocate for their acquisition.
- Liaisons are efficient in their methods of selection and collection activities to maximize their effectiveness in meeting their community's needs.
- Liaisons cultivate relationships with publishers and vendors of information products in their fields in order to advocate for their community's needs, and to collaborate with the Libraries' Collection Strategy and Management group.
- Liaisons understand the publication patterns of their assigned communities and participate in capturing the communities' research output for long-term access.
- Liaisons further their understanding of their collection through analysis, such as understanding the strengths and weaknesses of their collections, what pieces are highly used, what aspects are unique to MIT, how their collection is related to other similar programs in other institutions, etc.

Staff development
- Every liaison has a plan to increase and evolve knowledge and skills in support of liaison work.
- Liaisons assess their work and create strategies to continuously improve their work processes.
- Liaisons seek to share their knowledge and expertise with other library colleagues to promote community-wide knowledge building.
- Liaisons have a balanced approach to liaison activities, including outreach, reference & instruction, collections and more.
- Liaisons regularly share effective outreach practices with colleagues to foster community development.
- Liaisons understand the multidisciplinary research areas in their communities and keep in touch with other liaisons to communicate needs.

**Behavioral performance guidelines for subject specialists/liaison librarians
in the Department of Reference, Collections and Research**
Adopted May 2010 by the RCR Heads of Subject Libraries
of the Penn State Libraries
Gary White, Head, Department of Reference, Collections and Research
Daniel Mack, Chair, Subject Specialist Liaison Librarian Task Force

Subject specialists who serve as liaison librarians in the Department of Reference, Collections and Research have responsibilities in the following six areas:
- *Collections content and access*
- *Reference and research consulting and mentoring*
- *Teaching, learning and literacies*
- *Liaison activities with assigned academic units*
- *Engagement and outreach with the University and beyond*
- *Scholarly communications*

Because of the varied disciplines in which subject specialists work, not every statement is relevant to every librarian's job, and probably no librarian performs every one of these. Still, most of the guidelines are relevant for most of the librarians in the department.

Collection content and access
- Librarians provide access to information in all formats and media as necessary to support the mission of the Libraries and the University.
- Librarians create detailed collection development policies that address issues including subject coverage, multiple formats and media, diversity, foreign language and international materials, and issues of space, annexing, and deselection.
- Librarians develop electronic collections to support all Penn State campuses and online initiatives including World Campus.
- Librarians consider new collection development models such as "just in time v. just in case" and user driven acquisition.
- Librarians involve users in the development and assessment of collections.
- Librarians manage collections funds responsibly and collaborate with the Libraries' Development Office to demonstrate outstanding and effective stewardship of gifts.
- Librarians participate in professional development about collection content and access through meetings, videoconferencing, mail lists via email, social networking and other available communication methods and forums.
- Librarians mentor colleagues in collection development strategies through listening, coaching, observing, providing peer assessment, and serving as models.

Reference and research consulting and mentoring
- Librarians provide reference and research services in person, at a variety of service points, and virtually using multiple media, including email, instant messaging and social networks.
- Librarians provide excellence in reference transactions, including approachability, civility, respect for diversity, appropriately conducted reference interviews, and timely follow up when necessary.
- Librarians consult with and refer to other library personnel when appropriate.

- Librarians provide services for multiple user constituencies, including office hours for research consultations and accessibility in multiple media.
- Librarians create research guides in areas of expertise for reference, teaching and learning.
- Librarians consider student needs, including diversity in learning styles, disability and accessibility issues, and ability level when planning and providing reference and research services.
- Librarians participate in professional development about reference and research consulting and mentoring through meetings, videoconferencing, mail lists via email, social networking and other available communication methods and forums.
- Librarians mentor colleagues reference service strategies through listening, coaching, observing, providing peer assessment, and serving as models Teaching, learning and literacies
- Librarians teach classes in areas of subject expertise, including library instruction sessions, guest lectures, credit courses, workshops, educational panels and other venues as appropriate.
- Librarians teach students to locate and critically evaluate information.
- Librarians view information literacy as part of a critical multi-literacies approach in which media, technology, visual, and subject area literacies are part of the interdisciplinary nature of the academy.
- Librarians understand that information literacy is a multimodal, collaborative process in a learning community.
- Librarians understand pedagogical principles, student learning outcomes, and create a learning environment conducive to those principles and outcomes.
- Librarians collaborate with faculty in designing integrated learning experiences for students.
- Librarians determine the appropriate mix of technologies and delivery channels to meet a particular audience's learning needs.
- Libraries create learning objects to support teaching and learning.
- Librarians consider student needs, including diversity in learning styles, disability and accessibility issues, and ability level for subject content in creating materials and environments for teaching and learning.
- Librarians participate in professional development about teaching and learning through meetings, videoconferencing, mail lists via email, social networking and other available communication methods and forums.
- Librarians mentor colleagues in teaching and learning strategies through listening, coaching, observing, providing peer assessment, and serving as models.

Liaison activities with assigned academic units
Note: The activities below are examples only; not all are appropriate to every audience. Librarians are encouraged explore innovative activities that engage and benefit both the Libraries and specific liaison audiences.
- Librarians engage in the academic operations of the colleges, departments, and programs they serve.
- Librarians attend meetings, participate in strategic planning and volunteer to serve on committees, task forces, and other working groups within units they serve.
- Librarians collaborate with units of assignment in programming and outreach activities.
- Librarians cosponsor lectures, films, and other events with assigned units.

- Librarians collaborate in planning and organizing symposia, local conferences, and other academic events.
- Librarians participate in the intellectual life of the units they serve as liaison
- Librarians meet with candidates who are interviewing for faculty, post-doctoral, and graduate student positions.
- Librarians co-research, co-present, and co-publish with collegiate faculty.
- Librarians teach credit courses for units they serve as liaison.
- Librarians participate in the creative efforts of units they serve, including artistic or literary creation, musical or dramatic performance, creating of exhibits, and other relevant venues.

Engagement and outreach with the University and beyond
- Librarians participate in community events as representatives of the library.
- Librarians participate in the life of the campus in co-sponsoring lectures, film series, symposia or other public events.
- Librarians foster diversity by employing an interdisciplinary and inclusive approach to campus engagement.
- Librarians engage student organizations as advisors, mentors, coordinators for projects, and as subject specialists.
- Librarians collaborate within and beyond the University in fund raising and grants.
- Librarians participate in development and alumni relations.
- Librarians maintain ongoing relationships with former students who are now alumni.

Scholarly communications
- Librarians understand current issues in e-scholarship and scholarly communications.
- Librarians are familiar with digital tools for locating, storing, & integrating digital media into research.
- Librarians advise users on the use of copyrighted works regardless of media or format.
- Librarians refer users to appropriate and legal sources for digital media.
- Librarians advise users on best practices in information workflow including data management, storage, and life cycle planning .
- Librarians know the relevant disciplinary and institutional repositories for their areas of expertise.
- Librarians engage scholars in discussions about copyright, licensing, open access and sustainable publishing models for academia.
- Librarians consult with experts within the organization and the profession about current issues in scholarly communications.

University of California, Berkeley
The Library
Library – Faculty Communications: Guidelines for Library Liaisons

Communicating timely, accurate, effective information to faculty is critical to the Library's mission. Library staff who serve as liaisons have primary responsibility for providing library information and services to Berkeley's faculty. Effective communications may be formal or informal. Methods, content, amount and frequency of communications vary depending on the subject discipline and the faculty members' needs.

1. Library liaisons will initiate contact with all faculty members at least once per academic year to provide basic information about collections and services, including what to expect from (and how to reach) the collection specialist, how to order materials for the collections, and how to resolve library-related problems.
2. Library liaisons will make special effort is made to contact recently-appointed faculty in person.
3. The Library encourages academic departments to designate a faculty liaison, or appoint a faculty library committee, to maintain and develop contact with the library liaison.
4. The Library encourages academic departments to invite library liaisons to department meetings at least once a year, preferably at a meeting early in the Fall semester. It is hoped that a graduate student representative would be present at this meeting between the faculty and the library liaison, and that he/she would communicate to the graduate student population of the Department the name and contact information of the Department's library liaison.

Some suggested methods for library liaisons to communicate:
1. Annual message (via letter or email) to all faculty with basic collections and services information.
2. Personalized telephone or email contact with recently appointed faculty.
3. Library newsletter with updates on personnel, budget, policies, new collections, consortial activities, electronic resources, etc.
4. Occasional faculty surveys to determine needs, opinions (requesting a response to a question about instructional needs, exorbitant journal prices increases, etc., provides feedback about the effectiveness of communications, attentiveness of faculty).
5. Seek opportunities to increase library visibility by such activities as attending departmental meetings, seminars, and colloquia.
6. Liaisons should work with their academic partners to have reciprocal web links, specifically links leading from the library to the academic program and from the academic program back to the pertinent information that the Library can offer.

The goal is to create an arrangement where the Library and the academic community have easily navigable channels between the services that each provides.
1. Coordinate communications with other library units (e.g., circulation, ILS) in order to alert faculty to impacts of policies and new developments.
2. Co-sponsor events (e.g., Morrison lecture series, exhibit openings).

The Subject Specialist Task Force was charged with identifying and articulating the role of subject specialists in the design, delivery and assessment of Library services and to develop a document that could be used in the preparation of new position descriptions. The Task Force targeted five areas of primary responsibility for subject specialists:
1. Engagement
2. Reference Service
3. Collection Development
4. Instruction
5. Professional Development

Within each of these categories, new and expanded areas of involvement with our users, the profession, and emerging information technologies were identified.

This document is not intended to be used as an assessment tool of an individual librarian's performance, but as a guide to the myriad opportunities our profession provides. It is hoped the ideas present a springboard for expanding the role of current subject specialists in the University communities they serve, as well as a guide to assist career advancement in the Libraries. Subject specialists all serve different constituencies with different needs and expectations based on a number of different measures. No one can expect to excel in all of the areas identified in this document. However, the Task Force believes the roles and responsibilities outlined below are realistic and achievable by most everyone working as a subject specialist in the University of Illinois Libraries. The final document should also provide easy development of position descriptions for any new employment opportunities in the subject specialist arena.

Identification of Roles & Responsibilities
1. Engagement
    a. Library commitment
        i. Works collegially with other librarians and staff
        ii. Maintains a high level of expertise in the subject area served and related areas
        iii. Stays abreast of new research and information trends in the subject area
        iv. Shares knowledge and subject expertise with others through formal and informal instruction sessions
        v. Practices continual needs assessment in assigned areas
    b. Campus Contacts
        i. Knowledge of the information needs of the community served
        ii. Maintains personal contact with users on a regular basis
        iii. Attend faculty meetings – offer to make an annual update presentation
        iv. Establish and meet regularly with a Library Committee representing users in areas served
        v. Establish and maintain regular office hours in served areas
        vi. Make regular rounds / site visits to served population(s)
        vii. Welcome new faculty and staff personally and with quick start guides to using the Libraries
        viii. Work with student organizations and groups within the discipline(s) served
        ix. Prepare exhibits in the Library or elsewhere on campus
        x. Serves as a resource for scholarly communications, copyright, open access, and the institutional repository.
    c. Professional Contacts
        i. Establish and maintain contacts with others working in similar positions at peer institutions

          ii.   Join and become actively involved in professional organizations supporting the subject area – either library-oriented or subject area specific

          iii.   Attend and participate in conferences supporting the subject area

          iv.   Active involvement in list-servs and others subject-specific communications mechanisms for the sharing of information

          v.   Establish and maintain contacts with industry and commercial entities and their representatives serving the subject area

    d. External Commitments

          i.   Active involvement in fundraising & grant-seeking opportunities

          ii.   Involvement in local community activities involving Library and/or subject area expertise

          iii.   Serve as ambassador of the University Libraries at local professional and community events

2. Reference

    a. Provides effective, responsive reference service through all media – in-person, email, chat, phone, and other means that may be available as technology changes.

          i.   Participates in reference service (both physical and virtual) throughout the Library.

          ii.   Responds within 24 hours to questions received via email.

          iii.   Works in a collegial manner with other departments and general reference services.

    b. Monitors and understands the most recent changes in the production of knowledge in the related subject discipline and the knowledge base as a whole.

          i.   Uses current awareness services and regularly reviews the professional literature.

          ii.   Keeps abreast of publications and trends in the subject literature.

    c. Provides reference tools in the form of written and electronic guides to the literature.

          i.   Creates and maintains general guides to the resources available to the users in all formats.

          ii.   Creates and maintains a variety of guides to specialized fields within the subject area.

          iii.   Creates and maintains a variety of links to useful internet resources for users.

          iv.   Shares information on specific assignments and resources with others working reference hours in other disciplines.

    d. Provides standardized office hours, either in the Library, the Department, or other areas that may be used by students and researchers.

          i.   Publicizes office hours to users to encourage walk-in consultations.

              1. 2)   Works with teaching faculty to identify physical spaces that might be used for the highest   exposure of reference services to students and faculty.

    e. Documents and analyzes data concerning reference transactions with a view to defining best practices in the discipline.

          i.   Maintains statistics to track numbers and types of questions received.

          ii.   Regularly reviews the types of questions being received.

          iii.   Keeps detailed log of consultations being provided and topics discussed.

3. Instruction

    a. Actively participates in Library and library information resource instruction to the campus community.

          i.   Works with faculty to integrate information literacy concepts and skills

              1.   programmatically into the curriculum

          ii.   Keeps current with relevant University and department curriculum initiatives in order to keep information literacy programs consistent with University curriculum.

          iii.   Promotes and offers group and individual instruction to faculty and students in relevant departments.

   iv. In instructional sessions, teaches students to recognize information needs, create successful search strategies, and evaluate and effectively use information resources in all formats.

   v. Teaches students to understand the research and scholarly communication patterns of their chosen disciplines as well as the economic, social, and legal issues around the use of and access to information.

   vi. Conducts needs assessment as appropriate and selectively measures instructional outcomes in order to ensure effectiveness of instructional initiatives.

  b. Commitment to improving personal instructional techniques
   i. Keeps abreast of national and international developments in information literacy and library instruction.
   ii. Lead internal (Library) presentations to share knowledge with colleagues
   iii. Participate in cross-training activities
   iv. Maintain awareness of professional standards – such as the ACRL core competencies

4. Collection Development and Management
  a. Selects material in relevant formats and languages to serve the research, teaching and learning needs of the University community.
   i. Accepts the emerging trends in, and user acceptance of, the electronic format.
   ii. Identifies and selects monographs, serials and non-print materials
   iii. Identifies and selects materials on the approval plan
   iv. Responds to purchase requests from users
   v. Provides access to materials in alternative formats when appropriate

  b. Manages collection funds effectively and in a timely manner.
   i. Reviews serial subscriptions and standing orders on a regular basis to insure that they reflect current research and instruction
   ii. Reviews approval plan profiles periodically to insure that they reflect current research and instruction
   iii. Reviews and manages firm orders and approval plan fund balances
   iv. Prepares budget reports, projections and needs assessments when necessary
   v. Adheres to collections calendar and timelines
   vi. Participates in special projects such as serials cancellation projects, flipping serial titles from print to online, etc.

  c. Develops skills with and knowledge of current technologies required for the collection development process
   i. Keeps apprised of changes and developments in relevant subject areas
   ii. Keeps apprised of publishing trends in relevant subject areas
   iii. Keeps apprised of current issues and trends in collection development for academic and research libraries
   iv. Acquires knowledge of collection development tools and resources (GOBI/YBP, folders on g:drive)
   v. Keeps up-to-date with UIUC Library collection development procedures, standards, and requirements.

  d. Analyzes collection characteristics and collection usage data to better serve users and keep up with research trends.
   i. Reviews circulation data
   ii. Actively engaged in physical collection management (includes de-acquisition)
   iii. Actively contributes toward the development of criteria to inform broad collection management decisions
   iv. Communicates and collaborates with the Collection Development community
   v. Analyzes subject area or discipline in order to inform collection development

  e. Develops and maintains cooperative and constructive relationships and communicates when necessary
   i. With faculty, instructors, students, colleges, and departments

        ii. With other UIUC subject specialists/librarians

       iii. With vendors and book dealers

       iv. With donors and Library Advancement Office

       v. Communicates effectively with Acquisitions Department, Collection Development Committee, and AUL for Collections, and Library IT.

       vi. Works with colleagues in CARLI, CIC, and other consortia activities.

  f. Discovers and recruits institutional scholarly output, research data, and other content for inclusion in the Library's digital initiatives, scholarly communication programs, and special collections

       i. Collaborates with researchers to identify data management and curation needs, including identification of datasets and other research materials that could be made accessible via IDEALS or other Library services

       ii. Identify potential sets of institutional scholarly output (for example, technical reports, working paper series, and proceedings of locally held conferences) for inclusion in IDEALS

       iii. Identify potential sets of institutional output (for example, faculty papers and administrative records) for accession by the University Archives

       iv. Identify potential items or collections (either for acquisition or that already sit within Library collections) that may be part of special collections.

       v. Collaborates with users and Digital Content Creation to identify and assess potential collections for digitization and online access and use

5. Professional Development

  a. Attends and actively participates in professional development events

       i. Attends professional conferences, either physically or virtually.

       ii. Participates in webinars as an attendee and/or instructor.

  b. Monitors trends and initiatives in librarianship and in subject disciplines.

       i. Reviews professional literature.

       ii. Stays current with information from non-traditional sources, such as blogs and videos.

       iii. Uses current awareness services and tools.

  c. Learns about new resources and services provided by the University & Library.

       i. Attends local seminars and workshops.

       ii. Emails or meets with colleagues to learn more about specific resources or services that they provide.

       iii. Monitors and participates in relevant listservs.

  d. Identifies explores opportunities for providing new or improved services & tools to library users.

       i. Stays aware of new services being offered by other academic libraries.

       ii. Tests new tools that might benefit library users.

  e. Shares discoveries with interested librarians, library staff, teaching faculty, and students.

       i. Provides brief updates at relevant committee meetings.

       ii. Reports back to colleagues after a conference.

       iii. Regularly communicates with interested communities through blogs, email, or other social networking tools.

  f. Gains and maintains competency with necessary tools.

       i. Uses collection management tools, such as Gobi and Excel.

       ii. Uses web development tools, such as OpenCMS and LibGuides.

APENDIX V: TASK FORCE CHARGE

CHARGE

Liaison Librarian Task Force 2012-2013
The University of Maryland Libraries

Date: October 2, 2012

Members: Yelena Luckert (co-chair); Daniel Mack (co-chair); Patti Cossard; Svetla Baykoucheva

Rationale:
Subject liaisons are a critical link between the University Libraries and the university community. The Liaison Librarian Task Force is charged with examining and further developing the current liaison librarian program in the University of Maryland Libraries in order to foster excellence in our liaison activities. Achieving excellence in the liaison program is one of the strategic priorities identified by the public services division.

Charge:
The Task Force is specifically charged to:
1. Examine the current liaison program at the University of Maryland, including documentation of past work
2. Examine formal liaison programs at other premier research libraries and relevant national trends and guidelines related to liaison activities
3. Identify best practices and develop a list of core competencies, including both subject competencies and soft skills, based on internal documents, benchmarking, and national guidelines
4. Recommend standard assessment methods for liaison activities
5. Create a draft training program and recommend other tools for professional development in relevant competency areas

It will be important to broadly engage subject librarians in this process through open forums and other means that give librarians an opportunity for ongoing input into this work.

Sponsor: Gary White

Timeline:
Charged: October 2012
Status Report: February 28, 2013
Final Report/Wrap UP: June 2013

APPENDIX VI: UNIVERSITY OF MARYLAND LIBRARIES LIAISON PROGRAM, BACKGROUND DOCUMENTS

The University of Maryland Libraries has long recognized the importance of the liaison program to the University community and the Libraries. Detailed information about this program can be found at http://www.lib.umd.edu/services/liaisons. It is important to list several of the documents that comprised this program here, as the newly proposed behavioral guidelines are direct outgrowth of the University of Maryland Libraries existing liaison program:

- Report to the Dean of Libraries, University Library Council, April 2006. The Liaison System, http://www.lib.umd.edu/binaries/content/assets/public/services/liaison-system/ulc-liaisonsystem-042006.pdf.
- Liaison System Report, May 22, 2007, http://www.lib.umd.edu/binaries/content/assets/public/services/liaison-system/liaisons-lswgreport-052007.pdf.
- Guidelines for subject librarian liaisons, December 10, 2008, http://www.lib.umd.edu/binaries/content/assets/public/services/liaison-system/liaison-guidelines-library.pdf.
- Liaison system implementation group (LSIG), Final Report, January 16, 2009, http://www.lib.umd.edu/binaries/content/assets/public/services/liaison-system/liaisons-lsigreport-012009.pdf.