Creating and Managing a New Liaison Organizational Model:
Strategies for Success

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Introduction

Over the past decade, there has been an increased focus on liaison librarianship in response to changes in the higher education landscape. Within higher education, there have been significant shifts in student learning, assessment methods, technologies, scholarly communications, the management of research data, and the impact of "big data." In ongoing efforts to broadly support initiatives and changes in higher education, academic libraries began examining the roles of liaison librarians and to develop strategies to support emerging changes. One of the first major publications in this vein was the 2009 *Special Report on Liaison Librarian Roles*, published by the Association of Research Libraries (Hahn, 2009). This report discusses how liaison roles are evolving and how institutions can prepare and support these transformations. The Association of Research Libraries (ARL) followed this with a new report in 2013 entitled *New Roles for New Times: Transforming Liaison Roles in Research Libraries* (Jaguszewski & Williams, 2013). This publication focused on the changing nature of research and learning and how to position liaisons to respond to these

changes. One critical point in this work is that there has been a shift in focus from "what librarians do" to "what users do" (p. 4).

In the past few years, there has been much attention focused on liaison programs in academic libraries. In 2014, the Association of College and Research Libraries published *Assessing Liaison Librarians: Documenting Impact for Positive Change* (Mack & White, 2014). There have also been several publications about the transformation of liaison programs (Luckert, 2016; Miller & Pressley, 2015; Schoonover, Kinsley, & Colvin, 2018). Additionally, several national institutes focused on models for liaison librarianship have taken place, including the ARL/Columbia/Cornell/Toronto Pilot Library Liaison Institute (Rockenbach, Ruttenberg, Tancheva, & Vine, 2015) and the Prairie Liaison Institute offered by ARL in conjunction with the University of Illinois, University of Minnesota, and University of Wisconsin (2017). This suggests that there is a great deal of interest in the profession in creating effective models of liaison librarianship.

Impetus for Change

Until 2012, subject librarians at the University of Maryland were primarily reference librarians who had been assigned subject responsibilities. Librarians spent significant time staffing the reference desk in addition to supporting teaching, research, and collection development with their assigned academic departments. From 2009 to 2012, the administration of the University Libraries completely changed with the hiring of a new dean of libraries and two associate deans. During this time, there was a great deal of discussion in the profession about how academic librarians could best support researchers. There was also a growing interest in, and need for, assessment of library services. These changes were a reflection of broader shifts within higher education, where there tends to be a greater emphasis on assessment and outcomes.

University of Maryland librarians were also aware that research services on campus were widely dispersed, with various support services offered by different units including the Libraries, the Division of Information Technology, the Graduate School, and the Office of Research. There was little coordination among these units at the time, resulting in a confusing system in which users needed to contact various offices for required resources. Some services, such as statistical consulting, were not offered at all.

One of the strategic initiatives of the libraries is to support the research and teaching needs on campus. As such, the libraries decided to take an active approach to reimagining how our subject librarians/liaisons could better support the existing and emerging needs of researchers and teachers. This rapidly changing environment involves a number of technological advances, a greater emphasis on teaching effectiveness, and evolving modes of scholarly communications.

Creating Task Forces

The process began with several forums in which librarians gathered to discuss our existing reference/liaison model, the changing nature of liaison responsibilities, and the library's capacity to support expanded liaison activities. In order to begin a dedicated effort to examine liaison responsibilities, the associate dean for public services charged a task force in 2012 to

- examine the current liaison program at the University of Maryland, including documentation of past work;
- examine formal liaison programs at other premier research libraries and relevant national trends and guidelines related to liaison activities;
- 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;
- recommend standard assessment methods for liaison activities; and
- create a draft training program and recommend other tools for professional development in relevant competency areas.

Shortly after the liaison task force began its work, a separate "Research Commons" task force was formed to develop the concept of a physical and virtual Research Commons that would provide a framework for supporting higher-level research and teaching activities for faculty, graduate students, upper-level undergraduates, and visiting scholars. The task force was charged with creating a plan to support specialized research services, including data and GIS services; bibliographic citation and reference management tools; statistical consulting services; advanced writing/dissertation writing support; scholarly communications/scholarly publishing and copyright services; and assistance for developing research proposals and designing research projects. In short, the task force was charged with creating a suite of services and spaces to support all aspects of the research lifecycle. A key aspect of the task force's work was to develop a centralized location or "one-stop shop" for these services in partnership with other campus units that might be better equipped to offer certain services. For example, the library works closely with the graduate school on writing services as the graduate writing center is physically located in the main library. It was understood from the start that these reimagined services would also largely fall under the purview of our liaison librarians so it was necessary for the two task forces to collaborate as they developed their recommendations.

Both task forces concluded their work in 2013 (Corlett–Rivera, et al., 2013; Luckert, Mack, Baykoucheva, & Cossard, 2013). The liaison task force developed a framework of core competencies in five broad areas of responsibilities:

1. collections content and access
2. outreach and engagement
3. reference and research consulting
4. scholarly communications and research data services
5. teaching, learning, and literacies

In each of these areas, the task force developed a list of expectations and guidelines as well as recommended methods for assessment. As part of their work, the task force benchmarked with other large research libraries to gather sample liaison job descriptions, available best practices, and methods of professional development.

The Research Commons task force also engaged in extensive benchmarking and surveying of faculty and graduate students. The final report provided a guide for developing a services model with relevant campus partners, with a phased-in approach over three years. The recommendations covered staffing needs, including a new position for the head of the Research Commons; a space plan; a marketing and communications plan; and guidelines for assessment and integration into the library's broader strategic plan. As a result, the Research Commons initiative became one of the library's overall strategic priorities.

Adoption and Growth of the Liaison Program

The *Liaison Task Force Final Report* (LTFFR) produced considerable interest, mixed with excitement as well as concern, among all levels of library staff. There was also a healthy dose of skepticism as many people did not fully believe that the changes identified in the report would actually be implemented. The former reference librarians, who were most directly affected by the changes, felt particularly vulnerable in this situation. This group consisted of about thirty individuals at various levels of their career, with the majority in their mid- to late-career track. They, as well as the rest of the library staff, had to be convinced and brought on board for impending changes to be successful.

Communication and Transparency

Communication, transparency, action, and expediency became of great importance to the success of the changes. Even before the two task forces were formed, there was a series of public conversations within the libraries with all levels of staff, particularly with the most affected, to introduce everyone to the new concepts and the impetus for change. The two task forces were asked to operate in a transparent environment where they would regularly consult and update liaison librarians and others who

would be impacted by their recommendations. Administration and relevant department heads regularly communicated the reasons for the task forces, held forums and open sessions to gather input, and kept people abreast of developments, as there was still a great deal of apprehension among many subject librarians. It was decided early on to openly discuss concerns and fears and to approach the upcoming changes in a positive, constructive manner rather than a punitive stance, or pointing out what people were not doing, or not doing well enough. This approach, over time, did alleviate many fears as the administration framed this as a change that "we are all going through." In addition, the administration was very open in conveying the notion that few, if any, librarians were currently equipped with all necessary skills to conduct many of the core responsibilities. Instead, they indicated that the library would develop a comprehensive professional training program to help individual librarians gain knowledge and skills.

At the same time, the associate dean of public services worked with the dean of libraries and other associate deans to ensure their support for the program. The provost and other campus administrators were informed and supported the change. The associate deans for public services and collections met with individual departments throughout the year to present the new model and its positive potential for their work. The library staff were made aware of these conversations.

Reorganization and Governance

At the start of the implementation process, the Public Services Division (PSD) was reorganized. The previous PSD management group was very large, made up of librarians representing too many smaller groups with conflicting priorities. Decision-making processes often resulted in stalemates and, at times, in conflicts. Every branch head was also a part of that group. By consolidating units with similar missions and functions, the decision process was streamlined with positive outcomes for the division.

Consolidating smaller units provided the necessary platform to push the liaison program forward. Reference librarians from branches, along with reference services unit and the teaching unit that administered all instructional activities, were put into a single department, Research and Learning (R&L). The Research Commons (RC) was created as a part of R&L. The heads of these sub-units now comprise the R&L Heads group, a management group that helps govern the department. Thus, all liaison librarians, subject and functional, are in the same department, with the same goals, single leadership, and decision-making process.

While liaison librarians are in the same department, each unit retains its own mission and activities. The STEM Library, for example, differs in its mission and clientele from the Performing Arts Library or the Main Library. Each branch also has a specialized Research Commons with its own services. However, there are more

similarities than differences among these units in the type of work they do and how they do it. It therefore makes more sense to unite them in a single department.

The director of R&L, supported by R&L Heads, determines priorities, and administers and leads all new and existing functions and programs across all units within R&L, moving the entire department forward, regardless of location, ensuring the outcomes desired by the organization. All major initiatives are now handled this way, including the libraries' instructional program, research and scholarly services, and the development of the liaison program. One of the more positive byproducts of this administrative restructuring is that it truly encourages cooperation and collaboration among librarians from different units and geographical locations, breaking previously existing silos and creating a synergy that leads to interdisciplinarity, more creativity, cross-training, and richer final products.

Research and Learning consists of eight units from five locations across campus. It includes a liaison librarian unit in the main library, four branches, Teaching and Learning (T&L), Research Commons, and Reference. The majority of the department are faculty librarians, all with liaison assignments, and the non-librarian staff who work primarily in circulation in the branches. We also employ five graduate assistants, contract employees, and library fellows, who are usually graduate students or post-MLS graduates working on defined projects.

Due to librarians feeling disjointed and isolated, it was necessary to create a unified department where members feel a sense of belonging. Several simultaneous measures were taken to address this issue, particularly in the area of communication. We created multiple mechanisms for internal communications that include email, regular individual and unit meetings with members of the administration, internal workshops and conferences, creating workspaces for those whose main office is somewhere else, rotating meetings to different locations, and so on. For the sake of this chapter, we highlight our R&L Forums.

Having so many people in one department working across a large campus and in jobs that support users makes it difficult to get everyone in the same room. In our case, there is also no clear "water cooler" where people can stop and chat about their daily work. Therefore, we looked for ways to get people together where they could discuss their projects, seek needed advice from their colleagues, talk about best practices, discuss new library and departmental initiatives and future directions, and hear what their colleagues and other library departments are up to. R&L Forums became our "water cooler" and are now deeply ingrained in the department's fabric.

These monthly forums are open to everyone, but they are primarily to help liaison librarians improve their daily work and to advance the liaison program. They often feature guests from other libraries' departments who discuss processes that affect workflow, including circulation, ILL, digital stewardship, discovery, catalog maintenance, and IT. Other guests come from outside the libraries, such as the Center for Teaching Excellence and the Office of Academic Integrity. The forums also feature

work done by our own librarians, such as new experiments in teaching or collection management, and presentations from conferences attended or workshops that could be of use to others. Finally, we discuss the administrative initiatives of the department, including our annual review process, the department's strategic plan, and proposed changes to our work or workflows. Although many of these forums are fact-finding and information sharing venues, when we discuss administrative issues, they often become the final approving stage in a decision-making process.

Our Decision-Making Process

Developing a transparent and meaningful decision-making process took some thought. We wanted to create a department where new initiatives are supported, not just executed, by those doing the work, and where ideas can easily be expressed and adopted into the workflow. Buy-in and general participation in the decision-making process were of great importance. Again, the size and geographical separation of the department had to be accounted for and addressed. Realizing that getting people in one room and creating additional meeting time for our situation simply will not work, we looked into other ways to achieve the same goal of giving every person in the department an opportunity to participate in the decision-making process.

To do this, we utilize every group and communication system available to us in R&L. The department-wide projects and initiatives can come from upper administration (e.g., the strategic plan), R&L units (e.g., the Learning Outcome Assessment Program) or individuals (e.g., a Money Talks series that promotes financial literacy), as long as they comply with the libraries' and division's strategic priorities. The role of R&L Heads is to determine strategic alignment and to formulate the project, including the desired outcomes and timelines and to work with their units to ensure buy-in. It is not uncommon for R&L Heads to produce an initial document to get the ball rolling, such as for the development of the annual assessment model. Then the initiatives are fully discussed in each R&L unit, providing input and adjustments. This input is carefully folded into the final product or document by the R&L Heads. The newly developed documents are shared electronically among all R&L staff and discussed at R&L Forums for final approval by librarians. From there it moves on for the endorsement of upper administration. All of our large-scale projects are handled this way, including the development of the R&L Mission, Vision, and Values (our first joint project), the annual review process, the strategic plan (we are on the second iteration now), the reference service model, the Learning Outcome Assessment Program, and others.

Each project requires its own timeline to ensure that there is a proper vetting process in place. Some issues make people feel uneasy and resistant if they are not allowed input, and this builds negativity that leads to poor morale and performance. For example, from very early on, changing the reference model was a hot-button

issue. R&L Heads used our existing statistics and data, including several internal studies done by our reference services librarians, to suggest a new model to better reflect changes in user behaviors, our staff, and our budget reality. One element of this change was to move liaison librarians away from the physical service points as we noticed a sharp decline in reference inquiries for walk-ins and to address workload issues impacted by growing demands in other areas. A number of librarians protested as they saw reference as central to their professional identity, and we had to adjust our initial proposal based on their input. As a result of these negotiations, we instituted on-call librarian office hours and librarians' presence on CHAT and AskUs services. We also developed a robust referral training for staff and students which we consistently monitor to ensure compliance and success. This led to much better service for our users while also addressing workload pressures. While at times we wait months to institute something we consider important, in the end, we believe this time is well spent. By garnering buy-in from across the board, taking care to listen to people's voices and giving everyone an opportunity to speak up, we have not heard complaints about issues of transparency and decision-making. This was a common occurrence before this organizational change.

Measuring Success

When too many changes are going on at the same time, employees can get confused regarding institutional priorities and may become complacent. To get better engagement and participation, it is important that people fully understand what is required of them. It also helps to map new processes onto existing ones in the early stages of organizational development. Our annual reporting is one of the best examples of this.

Developing an annual review process for liaison librarians was one of the top recommendations of the *Liaison Task Force Final Report* (LTFFR), which defined it as an assessment tool to measure and communicate the value of the work of individuals. We strongly believe in an annual assessment exercise as a developmental process for librarians, and when seen all together, this also measures success and impact not only of individuals but also of the entire program and organization. Following the LTFFR framework, we measure librarians' output in five different categories which we consider major functions of liaison work: collections, teaching, reference, outreach, and scholarly communications/data research. Since we believe that annual assessment is a developmental tool to improve individual performance and encourage professional growth, it has to be a part of a conversation between liaisons and their supervisors and must be actionable, measurable, and flexible. It is crucial to define a baseline of what is expected of everyone in these positions, and we had to collectively come up with what we see as core responsibilities of liaisons. Training is another important part of this conversation as it is imperative to provide people with the necessary means to be successful and ensure that professional development

occurs across the organization. We do not view our annual assessments as a punitive measure, and we accept failure as a part of our job to encourage innovation and learning. Therefore, we see our annual review as part of the professional growth of individuals.

The new expectations we had for liaisons differed from the expectations we previously had for our public services librarians. We wanted our liaisons to be more outwardly focused toward their faculty and students, more proactive and involved with their departments, and take on more leadership roles in the library and campus than the previous inwardly focused roles of reference librarians. It was very important to start annual reports as soon as we implemented the new organizational change to help all our librarians to grow into their new jobs. It should be noted that our newly hired librarians were the biggest proponents of implementing annual reports as they saw them as important in their work development and integration into the organization. It helped enormously that we layered our new processes onto already-existing and very involved library annual review and promotional processes, following the same timeline and criteria. So in a sense, we only changed how we view and evaluate the librarian portion of the review processes, standardizing it across the board for all liaison librarians regardless of location or functions.

Professional Development Program

As we all know, liaison librarians must continually improve their skills and knowledge to keep current with the needs of the campus community, library profession, and their subject or functional areas. This is a key element to their success and we made it a part of their annual assessment process. To this end, we have been continually working on putting together a professional development program, which combines formal, informal, internal and external learning and training opportunities, both individual and group-based. It should be noted that our librarians consistently ask for training as well. We send people to conferences, workshops, training, and leadership development programs, locally, nationally, and even internationally. We encourage and support enrolment in advanced-degree academic programs. Along with the R&L Forums, we organize workshops in areas where the staff need additional training. For example, we conducted a much-needed workshop on multigenerational workforce issues to improve internal communication and a communications workshop to teach us how to better communicate our messages to people outside the libraries, which was run by comedy improvisation consultants.

In the past couple of years, as a result of feedback from our librarians, we began to look at training in a more systematic way and to take a more organizational approach to it. Beginning in 2017, we developed a Peer Teaching Observation Program (PTOP). It is a collaborative process in which colleagues observe each other with the intention of sharing instructional experiences. PTOP is not intended to be

punitive or judgmental but a positive, productive, affirmative learning experience for both observers and the observed. In the fall of 2018, we put forward the UMD Libraries' Fearless Teaching Institute, a series of workshops, Journal Club meetings (where we collectively discuss scholarship in the field of librarianship), and professional development opportunities targeted at growing and improving teaching in the libraries. Individual events within this program are open to everyone; however, to qualify for a certificate, one needs to participate in five workshops, three professional development events, and a peer teaching observation. For now, the certificate earns bragging rights and a better score for the annual review, but we are looking for other ways to recognize participants. The goal is to create a culture of learning and support.

This year, we are also in the developing stages of planning the Big Ten Academic Alliance (BTAA) Liaison Institute, which we are working on with the rest of the BTAA Libraries. Our goal is to establish a sustainable and accessible peer network of liaison librarians among our institutions who can share their expertise across the BTAA Libraries and participate in joint training, partnerships, and other opportunities. The University of Maryland is leading this effort and is hosting the very first of these events on our campus in June 2019.

Impact of the New Model

In the last five years, we have seen considerable improvements both within and outside the libraries. Moving people from a passive to a proactive state of mind and providing them with support, direction, and training has slowly turned the libraries around. Our 2017 LibQual survey had more than 5,000 participants, distributed among students, faculty, and staff, and showed overall great satisfaction with the libraries and our services, particularly our public services librarians, of whom all are liaisons.

Gradually, the libraries have become intellectual hubs on campus. In 2018, on top of our regular teaching load, we organized 118 independent events that were attended by 1,265 students, faculty, and staff. Among our most popular programs are *Speaking of Books: Conversations with Campus Authors* (https://www.lib.umd.edu/rc/speaking-of-books), the only venue on campus for faculty to present their new books; *Interdisciplinary Dialogues* (https://www.lib.umd.edu/rc/interdisciplinary-dialogue), a series of independent forums that address the most acute issues on campus, like big data, emigration, or sex on campus, with panelists from across different academic and non-academic departments and even student organizations; *STEAM* (Science, Technology, Engineering, Arts and Mathematics) Salons (https://www.lib.umd.edu/rc/steam-salon), a showcase of inspiring research projects that use technology to solve common human problems; and *Money Talks*, events that encourage financial education and literacy.

We have built many strong partnerships on campus and continue to look for more. Each one of these partnerships is unique and has different elements, but all require focus, perseverance, dialog, understanding, and willingness to compromise. For example, we have been the leading partner in developing *IRRoC* (Integrated Research Resources on Campus) (https://irroc.umd.edu/), a unified, central access point to connect the University of Maryland research community with resources and services across campus. The other two campus partners are the Division of Research and the Division of Information Technology. We believe that this is a remarkable achievement; however, until we understood that "research" means different things to different people on campus, the project was not possible. Another strong partnership is with the Graduate Writing Center, co-teaching many workshops for graduate students and providing them with space. The Teaching and Learning Transformation Center is another strong partner that we work with to improve our own teaching and is another venue to help us integrate our instruction into the campus curriculum.

It is important to mention internal changes as well. We see our librarians far more engaged. Many of the programs described above are the results of their ingenuity and hard work. We have also seen a greater level of cooperation among librarians of different units representing different disciplines working on joint projects, like providing a library kiosk at the campus farmer's market last summer or organizing numerous activities around the libraries to celebrate Mary Shelley's *Frankenstein* in partnership with the English Department. It is heartening to see that our librarians are consistently looking to improve themselves and to grow professionally. The most telling testament to this is the fact that all of our liaison librarians who went for promotion and permanent status review in the past five years have been granted promotions.

Conclusion

At the University of Maryland, we will continue to refine our liaison program and to monitor needed skills and resources to ensure effectiveness of service. We work closely with our campus leadership, senate library committee, student advisory group, and academic units to monitor emerging needs and to ensure that liaisons are trained and are equipped to effectively work with faculty and students. The library is also actively participating in national institutes, including the BTAA institute discussed above. While the change process has not been without issues, we have found success in actively engaging our liaisons in the process and by offering a wide range of professional development activities to reduce resistance and to better position the library to take a proactive role in the research and teaching enterprises on our campus.

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