Association of Research Libraries/Columbia University/Cornell University/University of Toronto
Pilot Library Liaison Institute

Final Report

Held at Cornell University, Ithaca, New York, June 2015

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Preface

In June of 2015, Columbia University, Cornell University, and the University of Toronto partnered with the Association of Research Libraries (ARL) on a pilot library liaison institute to bring together a critical mass of liaison librarians to explore future models for structuring liaison work and to discuss ways to measure the impact of liaison work on fulfilling the mission of the university. The Library Liaison Institute, held at Cornell University, has provided enough data to establish a baseline and recommendations for other institutions. This report summarizes the institute and offers critical reflection and recommendations based on what the institute organizers learned by bringing together almost 50 liaisons from across the three institutions.

In the introduction the authors present selected milestones of various regional and national developments in liaison librarianship that led to the 2015 Library Liaison Institute. The summary section describes the activities liaisons from the three institutions engaged in during the institute and summarizes the themes that emerged. A section of observations and next steps discusses the institute activities and themes from the point of view of the respective associate university librarians (or equivalent) who broadly oversee library liaison activities at Columbia, Cornell, and Toronto, and the ARL program director who helped organize the institute. This section also describes a number of follow-up steps at the three institutions.

Finally, the authors include two appendices—the actual agenda of the Library Liaison Institute and a best-practices document that provides concrete guidance and advice for other institutions considering similar events.
Introduction

Academic and research libraries have been talking about the changing role of subject specialists and liaison librarians since the early days of networked electronic information.¹ The shift in responsibility from purchasing print materials for a local constituency to managing a proliferation of formats, business models, and ownership and licensing arrangements, has been a key driver of those conversations. Transformations in research, teaching, and learning caused by the growth of the Internet have been profound for the library as an institution and for the front-line professional staff who interact directly with faculty, students, and staff on the library’s behalf. With the ever-growing sources of information that became accessible far beyond the boundaries of the institution, bibliographers previously dedicated almost exclusively to collection development, assumed reference and instruction responsibilities to help students and faculty find and use these resources.

Central to the way of thinking about the library with respect to the network was the notion articulated by Michael Buckland in his prescient 1992 manifesto on *Redesigning Library Services* (ALA), that helping users interact with new technologies, use information, and acquire knowledge was as important, if not more important, a role for the library as connecting a user to a resource.² And while 1992 was very early days of Internet in libraries, the promise and magnitude of the network was not lost on library leadership. For instance, ARL conducted the first of three SPEC surveys on the library liaison position in 1992. The 1992 SPEC survey authors wrote, “In a setting where access to information is infinite, the role of the liaison as a knowledgeable guide grows in importance,” and “as the physical collection becomes less central, the user is becoming the focus of library services.”³ Incidentally, the authors envisioned challenges that still persist in 2015, such as the need for new measures to assess the effectiveness of liaison activity in this new environment, and potential new roles for liaisons as teachers and active partners in research teams.

Since 1992, ARL has conducted two more SPEC kits on the liaison position (in 2007 and 2015), which reveal several important changes. For instance, one significant shift between 1992 and 2007 was in the way liaisons experienced faculty demand for library services. In 1992, “over-demanding faculty” was a challenge, and in 2007, that concern had shifted to getting faculty attention. In 2007 job descriptions reflected the urgency libraries felt in including liaison librarians in academic department meetings and classrooms. As an illustration, one subject librarian job description included in the 2007 SPEC Kit, states that candidates would “develop strong connections with faculty and students to determine and address collections and service needs. A high level of proactive interaction between faculty and students and the librarian is essential. Seek opportunities for partnerships with assigned departments, including the development of digital content and services.”⁴ The successful candidate would also “analyze trends in the teaching and research programs of assigned departments, keep current with scholarship in the disciplines themselves, and use this knowledge to respond to departmental needs.” Subject specialists today constitute nearly 20% of the professional workforce in ARL libraries, but it is difficult to estimate the exact breakdown by discipline. In the most recent ARL Salary Survey (2014–15), nearly half of subject specialists listed their subject responsibility as “no subgroup,” with the other half split in nearly equal parts among social sciences, humanities, sciences, and area
studies. Also, according to the latest ARL data that include educational attainment (2010), about 30% of subject specialists have a subject master’s degree in addition to their MLIS. While over the last decade new job codes have been created for the “functional specialist” category to capture growing fields, especially in IT, functional specialist remains a much smaller percentage of the workforce than the subject specialist or liaison. While for many years, the model of library liaisons in research libraries has included reference, collection development, and instruction, in 2013, Karen Williams and Janice Jaguszewski challenged this framework in their report New Roles for New Times: Transforming Liaison Roles in Research Libraries,\(^6\) the result of their work with a small group of ARL member libraries. Williams and Jaguszewski highlighted a new model of the “engaged liaison,” a key characteristic of which was a shift to defining liaisons by what library users do (research, teaching, and learning) rather than what librarians do (reference, collection development, and instruction). The report generated wide interest in the library community and ARL.

Rita Vine (head of faculty and student engagement at University of Toronto) and Francine DeFranco (associate university librarian for administrative services at University of Connecticut) contacted ARL prior to the 2014 ALA Midwinter Meeting to help convene supervisors and administrators of liaison programs in ARL member libraries. More than 50 people registered for that impromptu meeting, signaling to Vine, DeFranco, and Judy Ruttenberg (ARL program director) that this was a critical issue in the ARL liaison community and worthy of further exploration and collective action. Liaison supervisors met again at the 2014 ALA Annual Conference, and finally, a small group of associate university librarians and liaison supervisors particularly keen to act\(^7\) met at ARL in October 2014 to contemplate next steps with the help of consultant DeEtta Jones. The group discussed the data gathered at both the ALA meetings and a variety of readings, including Cornell University Librarian Anne Kenney’s 2014 Ithaka S+R issue brief, Leveraging the Liaison Model: From Defining 21st Century Research Libraries to Implementing 21st Century Research Universities,\(^8\) which advanced five proposed success measures aligning academic goals with potential liaison activities, including promotion of the institutional repository and open access publishing, global engagement, and increased research funding. By the end of the meeting, the representatives of Cornell (Anne Kenney), Toronto (Rita Vine), and Columbia (Barbara Rockenbach, director of the Humanities and History Libraries) had tentatively agreed that Cornell, Columbia, and Toronto would develop a pilot institute for liaison librarians to address the issues that had surfaced in the series of ARL-sponsored meetings. These issues included but were not limited to:

- Partial recognition of the engagement model, accompanied by a still very strong sense that liaison librarians do instruction, reference, and collection development
- Perception that institutional rewards for advancement (i.e., promotion and tenure) and systems of assessment encourage liaisons to focus on what they do rather than on the impact they make on academic goals and objectives
- The need to clarify service expectations
- The need to rebalance responsibilities
- The importance of teams
- A desire for training
- A desire for tools, both for assessment (especially dashboards) and for customer service
- The importance of collaboration
These conversations, as well as the expansive engagement framework for library liaison work—developed at the University of Minnesota, and built upon at Duke University, the University of Iowa, Ohio State University, and others, which collectively redefined traditional roles and integrated new roles, including scholarly communication, digital tools, fund-raising, and working in teams⁹—led to the pilot Library Liaison Institute held at Cornell in June 2015.

Summary of ARL/Columbia/Cornell/Toronto Library Liaison Institute

After an extensive planning process, led by Kornelia Tancheva (associate university librarian for research and learning services at Cornell), Barbara Rockenbach, Rita Vine, and Judy Ruttenberg, as well as a team of liaisons from all three institutions, the Library Liaison Institute was held on June 10–12, 2015, and was facilitated by librarian and consultant M.J. D’Elia. In preparation for the Institute, registrants at Toronto and Columbia were asked to read a set of liaison-related documents (see the Further Readings section of the report) and had pre-travel meetings. The same set of readings were distributed to the Cornell participants who were not required to read them prior to the institute. Below is a summary of the event and the data/responses collected from the participants during the various institute activities.

Kickoff: Liaisons Identify Successes and Failures

The first exercise of the institute, executed over a wine-and-cheese reception, asked liaisons to share a success or failure from their own work. Recorded successes significantly outnumbered failures. Only three failures were reported: a faculty newsletter, a film series, and an academic department that took three years to appoint its library liaison.

Most successes described were of traditional liaison activities. Instruction-related successes dominated the list, and included increased instruction requests, oversubscribed workshops, and anecdotes from happy faculty and students. The next-largest success group was general outreach activities that generated expected or better-than-expected responses, often via surveys.

Liaisons reported fewer successful librarian-to-faculty outreach activities related to research or other non-teaching duties. Those that were reported included developing personal relationships (“Take them to coffee and ask about their research”), adding faculty content to the library’s repository, or negotiating an unreasonable request into something more reasonable (“They wanted me to do this but they ended up being happy with that”).

The institute organizers noticed that every success was measured by the degree to which the liaison perceived the value of the interaction as a value to the library, rather than to the community served. For example, success was measured by more instruction requests, more and happier teaching faculty, more happy students, more money for the library, and other measures that liaisons felt made the library look good. One participant wrote, “How can we translate what we do into solutions that faculty want?”, which illustrates this prevailing focus on the value in liaison work, centered on the library rather than on faculty or students’ needs.

University Leadership—Setting the Stage

The first full day of the institute began with a few introductory addresses and presentations. The morning opened with a presentation by Anne Kenney, followed by Judy Ruttenberg and Gretchen Ritter, dean of the College of Arts and Sciences at Cornell.¹⁰
Anne Kenney’s talk provided an overview of the economic and digital realities that define higher education today and pointed to several areas of library engagement that the future holds, among which she highlighted global engagement and collaboration. Kenney noted that the challenge for libraries is to redefine themselves and she offered the following strategies:

• Focus on university indicators such as the economic, digital, and global realities.
• Partner on campus with faculty, deans, provosts, and other administrators.
• Develop intervention strategies.
• Scale labor-intensive efforts.
• Quantify goals and progress.
• Build iteratively.
• Align with university academic goals and success measures.
• Move beyond the institution to find partners at other institutions to further goals and collaborate.

Judy Ruttenberg’s presentation offered a historical perspective on the evolution of the library liaison concept and the shifting challenges that liaisons face. She set the stage for the conversations to follow by asking the following questions:

• What will your primary responsibilities be?
• How will “liaison” be described?
• What subject expertise will you need?
• What tools do you need to do your job?
• Who is on your team?

Dean Gretchen Ritter’s talk referenced libraries in the broader context of the university and changes in higher education and positioned libraries at the forefront of thinking about where higher education is going. Ritter noted that libraries have had to reinvent themselves over the past decade and they “have things to teach the rest of us.” She discussed the library’s role in the age of Google and smartphones as:

• A place that leads in acquisition and curation of knowledge, emphasizing the needs of particular users
• A leader in information literacy
• An important learning space on campus that contributes to the conversation about collaboration and learning in new and different ways, bringing in students
• A source of inspiration, the “cathedrals of campus”
• A key participant in the conversations about new forms of academic production

Scenario Work—Potential Futures
The first programmatic activity for the liaisons was a discussion of future scenarios.

The institute planning team had created four scenarios to encourage the liaisons to focus on potential futures. These “provocations” were meant to move liaisons out of their comfort zone and to prompt thinking beyond the current moment. In the introduction, participants were asked to think not about what they do (reference, instruction, collection building), but the impact they make on campus. Institute organizers used the following prompts and guiding questions to lend focus to the exercise:
Higher education and academic research libraries are changing with unprecedented speed. New methods of conducting and disseminating research, new pedagogies, increased public scrutiny, and financial pressure call for accountability and value-added impact. In this new environment, the role of the library liaison will change to facilitate new forms of scholarship and teaching and learning.

Below we present four scenarios (some complementary, some mutually exclusive) and ask you to discuss them in small groups, answering and reporting back on these questions:

1. How do you as an individual prepare for this future?
2. What do you need your library management to do for this future?
3. How would this future change your relationships with faculty? Administrators? Colleagues?
4. Is this a plausible future? Do you see other possible futures for liaison work?

**Scenario One**
In the future, disciplinary expertise among liaisons will be the exception rather than the rule, with broad interdisciplinary clusters of librarians supporting the evolving interdisciplinary, global digital research environment. Liaisons will partner with faculty and graduate students in advancing and facilitating digital scholarship, research output, and data management.

**Scenario Two**
The research library of the future will unbundle itself from a predominantly service role to a single home institution. In the future, the locus of research will not be individual subject specialists and individual research institutions. Instead, research support will be team based across institutions leveraging subject, technical, and functional expertise among similar institutions in support of the global elite university ecosystem.

**Scenario Three**
In the future, liaisons will be fully integrated into the teaching process. They will no longer give reference desk hours or teach one-shot instruction sessions. These will be handled by students or information assistants, while liaisons focus on discipline-specific research method courses, and critical thinking competencies. They will manage an increasing amount of data about learners for institutional analysis.

**Scenario Four**
In the future, all liaison work will begin with outreach. Communication and marketing skills will be more important than technical or disciplinary know-how.

The liaisons had an hour to talk about the scenarios in groups. Following the group discussions, all participants came back together for 45 minutes of sharing the major themes from the group discussions. These themes included:

**Project Management** first emerged as a theme during the scenario session, but it also came up throughout the institute as an important skill and role for liaisons in the future. Liaisons cited a need for training in this area for managing their own work and the work of teams partnering on research projects with faculty and students.
One liaison suggested that a project management approach has the potential to change the committee culture in libraries. Instead of committees, task forces would be set up with specific goals and deliverables with deadlines.

**Skill and Attitude Changes:** In each scenario, the groups noted that liaisons themselves need to change their attitudes towards their work. Phrases such as “mind-set change,” being more “nimble” or “flexible,” “losing your ego—not just about what you know,” and a need to be “more comfortable and capable of outreach,” were cited as requirements in the possible futures described in the scenarios. This was coupled with numerous calls for increased opportunities for training and professional development to develop the necessary skills to engage with students, faculty, and researchers in new ways. One participant described the need to think of liaisons as “stem cell librarians,” i.e., being able to grow into whatever is needed.

**Empathy:** Following closely on the notion of attitude changes, came a call for empathy as central to the liaison role. This emerged as a theme when several liaisons spoke about the danger of making assumptions about what users want from the library. Participants noted that there is much value in learning about what faculty and students are struggling with and thinking creatively about how the library can address their “pain points.” There was a call to spend more time listening to library users.

**Reference and the “One-Shot” Instruction Session:** Many at the institute hesitated to give up in-person reference or one-shot instruction. One liaison suggested librarians reframe how they talk about instruction because “one-shot” doesn’t describe the potential or actual relationship development that happens with faculty when planning an instruction session. If a relationship has been established, the one-shot should be one interaction among many. Another liaison described the reference interview as the primary point of intellectual discourse in a liaison’s job. These sentiments communicated a commitment by many liaisons to the core values of librarianship, while others perceived holding on to traditional reference as a legacy service that demanded rethinking. Other liaisons saw opportunity in thinking differently about reference and one-shot instruction through training students or other library staff to do this work. One liaison stated that students can be great ambassadors for the library and their involvement in library instruction can improve student learning in a more holistic way.

**Expertise:** The notion of expertise was a theme that engendered the most discussion and divergence among the liaisons. Many liaisons felt that expertise is at the core of what it means to be a liaison. Most defined that expertise as subject expertise, but there were a few liaisons with functional roles (data management, digital humanities, GIS) who saw expertise in the realm of functional specialties. Liaisons argued vehemently that this expertise is what gives liaisons their credibility with faculty and that liaisons’ compensation and faculty status are based on expertise. Some felt subject expertise enables liaisons to be conversant with faculty in the disciplines they support as well as understanding the research methodologies.

On the other hand, some liaisons felt that expertise is not an effective way to define liaisons, either in the subject or functional sense. One liaison stated that a subject liaison librarian model is not scalable at larger institutions with many disciplines, centers, and institutes. Another felt that even with a PhD, a liaison cannot have a comprehensive understanding of a discipline at a level that faculty do in their own subject area; therefore, librarians need to be careful about setting up expectations about depth of knowledge when marketing subject expertise. Several argued that faculty come to librarians for expertise in areas such as scholarly communication (authors’ rights, open access, research dissemination) and for student support needs.

After a healthy debate, participants discussed whether expertise is an individual attribute or a collective attribute. The notion of team-based expertise resonated with many of the liaisons since there are now so many
things that librarians are expected to know. The full group also discussed the merits of team-based expertise (working in teams) vs. network-based expertise (referring users to others in an organization). Several liaisons felt a network-based model requires a system such as a customer management system like Count It, used by Cornell. This would enable liaisons to track relationships across the institution.

Finally, the group discussed the fact that the ARL data doesn’t support the assertion that a majority of liaisons have deep subject knowledge.

**Needs Assessment**

The afternoon of the first day began with short presentations from the three institutions’ assessment librarians. Zsuzsa Koltay, director of Assessment and Communication at Cornell, presented results from a recently conducted faculty survey. She stressed:

- Building awareness
- Building students’ research skills
- Building services around top teaching and research challenges

Nisa Bakkalbasi, assessment coordinator at Columbia, presented highlights from a 10-year longitudinal study based on LibQUAL+ service quality survey data. In a nutshell, the largest change observed in the overall scores from 2003 to 2013 was for faculty. The results indicated that faculty expectations from libraries have grown in the past 10 years. Overall data showed great satisfaction with professional staff and library collections and pointed out potential areas of impact:

- Increasing researcher independence
- Increasing researcher self-sufficiency
- Ease of discovery

Klara Maidenberg, assessment librarian at Toronto, focused on ways to understand user needs and summarized the findings emerging from multiple user assessment efforts in three themes: collections, convenience, consultation. Among the findings, Maidenberg highlighted that the need for functional expertise is replacing the need for disciplinary expertise, which requires support in the following areas:

- Copyright
- Grant research
- Measuring research impact
- Digital scholarship and research support
- Academic integrity
- Research data management
- Meeting funding requirements
- IT and web projects

**Creating Value Propositions by User Group: Focus on the Liaison Customer**

The rest of the afternoon was devoted to a “value proposition canvas” exercise, facilitated by M.J. D’Elia. The main question of the afternoon was, what should library liaisons and library administrators do with information about their “customers”? In other words, how might libraries enhance their value or create new value based on user needs?
Step One: Value Mapping
Since the premise of a value proposition is the combination of products and services that create value for a particular customer segment, the first step in this exercise involved creating customer profile maps that looked at three different dimensions of each customer segment:

- Jobs and tasks (i.e., things customers are trying to accomplish in their work/life)
- Gains and outcomes (i.e., the outcomes or benefits customers want)
- Pains and frustrations (i.e., the things that annoy customers or prevent them from completing their jobs)

The participants were divided into small groups and asked to discuss the jobs, gains, and pains of a particular customer segment, using prompts and writing down their observations for 45 minutes. Once this phase was completed, each group paired up with another one and shared the most interesting ideas from each section for 15 minutes. Each of the customer segments was discussed by two different small groups.

The customer profile and the value map observations by customer segment included:

**A. Graduate Students**

The jobs graduate students are trying to accomplish include conducting research, organizing research (including citation and data management), working with technologies, publishing/communicating research, teaching, presenting, building professional networks, passing exams, writing theses and papers, searching for jobs, finding jobs, and maintaining a work/life balance.

The gains/benefits they seek include winning fellowships, research grants, and scholarships; producing research; increasing their research impact; acquiring employable skills; earning good grades, validation, and recognition, including higher self-esteem; completing a dissertation; getting published; and finding gainful employment.

The pains and frustrations they encounter have to do with insufficient resource availability, including data, technology, study space, and time; wasted time; lack of clarity about where to look for help; losing motivation and engagement; competing priorities, e.g., teaching and research, or work and life; interpersonal problems; and difficult job market.

The products and services that the library offers in support of graduate students, besides collections, spaces, reference, and instruction, include helping graduate students secure grant funding; providing data management tools; and helping with open access compliance, copyright, publishing, documenting impact, job searching, course/curriculum design, immersion programs for graduate students, etc. These services result in saving time, increasing productivity, peer recognition, better communication skills, and finding a job.
B. International Graduate Students
Among the jobs international graduate students seek to accomplish that differ from those in the more general category of graduate students, several stood out—writing and researching in a foreign language, improving cultural communication skills, and mastering academic integrity practices.

The gains specific only to this group of customers include international experience, feeling at home in a different culture, and connecting with faculty and colleagues across cultural barriers.

In addition to the pains and frustrations typical of all graduate students, international graduate students also have language barriers, challenges navigating new systems (including immigration, university hierarchies, and relationships between faculty and students), high family expectations, and being away from family and friends.

Institute participants viewed programs designed specifically for international students (orientation sessions, LibGuides, collections in original languages, etc.) as products that create benefits and alleviate pains.

C. Early Career Faculty
The jobs of early career faculty include conducting research, building a reputation as an expert in the field, grant writing, teaching, mentoring, networking, building a social media presence, performing administrative tasks, and earning tenure.

The gains they seek are recognition, publication, sabbaticals, reduced teaching loads, increased research impact, and tenure.

Their pains center around insufficiency or inadequacy of resources (research materials, technology, funding, and time) and maintaining a work-life balance.

Library support for early career faculty does not differ considerably from that aimed at mid- or late-career faculty (see below).

D. Postdocs/Fellows
The postdoc/fellow job that differs from other faculty groups is “finding a real job,” which also translates into the pains of insecurity, burnout, lack of recognition, and lack of clarity about the institutional context.

The library services for this group that differ from services for the other customer groups have to do with greater emphasis on orientation to the campus context (e.g., “enhance awareness of campus events and services”).

E. Teaching Faculty (non-tenured, seasonal, adjuncts)
Understandably, there is a greater emphasis on pedagogy for the teaching faculty—e.g., technical mastery of the course management system is one of the jobs in this segment and positive student evaluations feature among the gains, while job security is one of the pains.

Library services for this group are more centered on teaching and learning support, as well—e.g., building online teaching tools, information literacy consulting, and awareness of syllabi services are specifically mentioned only in this customer segment.

F. Mid-Career Faculty
Jobs in this segment that differ from those in the early career faculty segment include “new forms of self-actualization,” private consulting, more administrative duties, PhD student advising, building research labs, publishing in “good” journals, editing professional journals, popular news media participation, recruiting other faculty and students, and collaborative initiatives.
Gains that appear here but not in the early career stage include intellectual stimulation, research assistants, curriculum development, landmark work, office/lab space, prizes, honors, and awards.

Among the pains for this group are IT and assessment competencies, administrative responsibilities, and changes in the publishing landscape.

Library support for mid-career faculty includes help with teaching, grant applications, data management, open access (OA), copyright and author agreements, licensing, repository deposits, IT, researcher profile tools, developing digital humanities projects, grant compliance, creation of open educational resources, and alternative metrics. One participant suggested a library tagline for working with this group could be “your crisis is my crisis.”

G. Late-Career Faculty

Jobs specific to late-career faculty include archiving of scholarly legacy, succession planning, mentoring, and developing research institutes.

The gains are choice (of what new skill to learn, of whom to supervise), convenience, time, and recognition.

The pains include a lot of emphasis on perception (perceived mistreatment, perceived negative changes in students, perceived lower status in retirement), and resistance to change (e.g., moving books off site, changes in technology).

Library services specific to this customer segment include pulling together all publications, exhibits to showcase scholarly work, help engaging with students, and reducing uncertainty and anxiety over technology.

H. University Administrators

The jobs university administrators seek to accomplish include creating strategic initiatives, securing buy-in from faculty and staff, communicating about the institution, and budgeting.

The gains are evident in happy faculty, staff, and students; prestige; respect; and creating a legacy.

Their pains and frustrations are both internal and external—rapid changes in higher education, globalization, negative press, compliance with government regulations, juggling competing priorities, high level of scrutiny, managing expectations, and disgruntled faculty.

The library can offer institutional repositories, data curation, help with institutional reputation, developing a sense of community, and increasing faculty productivity.

Step Two: Creating and Assessing Value Propositions

At the end of the day, the facilitator transcribed both the customer profile maps and the value maps and prepared value proposition statements that were used on the second day for brainstorming and comments. The value propositions for the various customer segments were created based on methods from the book Value Proposition Design.\(^{15}\)

The following template was used for each statement:

Our____________________
products and services
help(s)____________________
customer segment
who want to _____________________
jobs to be done
The value propositions were presented on large sticky notes around the room for liaison response. A discussion and recording of observations in small groups followed for 30 minutes, followed by large-group sharing of the most promising ideas/opportunities for 15 minutes. The value proposition statements are reproduced below.

A. Graduate Students—Value Propositions
- Our carrel services help increase graduate student productivity by providing a distraction-free environment for studying and writing.
- Our SPARK (Scholars Present About Research and Knowledge) Talks help graduate students join the scholarly conversation by creating a supportive interdisciplinary environment in which they can discuss their research.
- Our grant support services help graduate students who want to apply for research funding by demystifying the grant writing process and clarifying application policies.

The first statement received a comment of “old school,” the second one received a lot of approval check marks, and the last one was perceived as possibly suffering from “mission creep.”

B. International Graduate Students—Value Propositions
- Our Dissertation Boot Camp helps international graduate students complete their dissertations by providing dedicated space and expertise in a supportive environment.

Responses to this statement were split between endorsement (“great idea”) and questioning whether this should be a library service.

C. Postdocs/Fellows—Value Propositions
- Our orientation programming helps postdocs save time by clarifying the services available via the library and acclimating them to the broader institution.

Responses were split between agreement and noting that the phrasing is centered on the library, not on the customer.

D. Teaching Faculty—Value Propositions
- Our faculty-focused development workshops help teaching faculty increase their professional skills and knowledge without having to leave campus.
- Our course/curriculum design workshops help teaching faculty fight their “imposter syndrome” by introducing them to sound pedagogical practices in the classroom.

Both of these statements provoked more negative than positive comments and questions, and were seen as examples of mission creep.

E. Early Career Faculty—Value Propositions
- Our digital resources and remote access tools help early career faculty save time by enhancing their access to quality resources any time from anywhere.
• Our citation management programming and tools help early career faculty increase their productivity by reducing the frustration associated with managing resources.

The former statement was seen as self-evident (to librarians, not necessarily to faculty), while the latter was perceived as not specific to early career faculty.

**F. Mid-Career Faculty—Value Propositions**
• Our institutional repository helps mid-career faculty amplify their scholarly impact by increasing access to their research.
• Our OA fund encourages mid-career faculty who want to pursue OA publishing opportunities by reducing their associated publishing costs.

The first value proposition raised questions about the tension between institutional repositories and subject/discipline repositories, such as arXiv.org, where faculty might be more prone to deposit their work. Liaisons discussed whether institutional repositories were complementary with or competitive with subject/discipline repositories. Responses to the second proposition were equally split between endorsement and doubts about faculty buy-in for OA publishing and its sustainability.

**G. Late-Career Faculty—Value Propositions**
• Our institutional repository helps late-career faculty leave a legacy by preserving their scholarly output.

Questions were raised about the rate of late-career faculty participation in repositories and the management and goals of commercial social-network-style repositories, such as Academia.edu. These included questions about who manages—hence controls—the information, the issues of copyright surrounding deposit of full-text articles, etc.

**H. University Administrators—Value Propositions**
• Our collection development activity helps university administrators solidify the reputation and prestige of the institution by providing faculty with access to world-class resources.

This value proposition was generally endorsed, although seen as “old school.”

**Observations on Value Proposition Exercise**
The value proposition exercise proved challenging to participants, and many commented that they struggled with crafting concise and compelling pitches for their offerings.

The organizers of the institute compiled their notes to produce some observations and reflections listed below:
• Responses to many of the value propositions were questions such as, “Do we do this?” and “Should we do this?” Most of these questions related to specific teaching activities like curriculum workshops and faculty-focused pedagogical support, but extended to other activities such as supporting graduate students’ grant applications.
• The value proposition exercise highlighted the differences between what liaisons value and what library users value.
• These value propositions highlight potential collaborators, such as campus teaching centers.
• These statements identify potential areas for new services or activities libraries haven’t yet implemented.
• One liaison reflected that libraries could incubate services, like supporting open access publishing, and then hand off that support to other departments in the future.
• If librarians can’t craft a compelling value proposition statement, perhaps they should reconsider whether the activity matters.
• Value propositions allow the library to be specific about a product, service, and audience, rather than relying on the library’s mission statement, which advances an overarching statement about the library writ large.
• Are there times when librarians should push an agenda even if users are not yet interested, for example, in areas such as open access? This might be a productive role for librarians to take on—but only if they frame it in terms of the users’ values.

After a very full day of presentations, group work, and discussions, the day concluded with informal dinners that participants self-organized for. No formal data from any of the discussions was captured; however, participants expressed satisfaction with including informal and unstructured time for the liaison librarians to interact with one another.

Liaisons’ Personal Reflections
The group reconvened the following morning and the day began with reflections on the day before. The organizers asked all the liaisons to take some time to reflect on three questions regarding their institute experience:
1. What excites or motivates you the most?
2. What scares you the most?
3. How can library administration support you?

All participants wrote responses to these questions on pieces of paper and then crumpled them up and simultaneously threw them to the front of the room in a “snowball” exercise, which ensured the anonymity of the responses.

For the first question, “What excites or motivates you the most?”, there was a range of answers from extremely positive, such as, “Now I am very motivated to go back to my library and figure out how we can transmit our value to our users. And I’m excited to spend more time thinking about whether the services we provide have actual value to our users and then let go of the services that are not valued. Possible workload reduction??!” Others were less positive, such as, “The pain is shared—we are all doing too much with too little and unsure of the impact.”

Other things that excited and motivated liaisons included:
• The possibility of greater teamwork both within institutions and between institutions
• The possibility of combining the strengths of subject expertise with functional/technical expertise
• Forming deeper relationships with others on campus, such as the undergraduate learning coordinators in departments
Moving away from seeing library users as one monolithic group and beginning to think about different user groups and addressing their needs differently

No longer designing services because librarians like to do that work or think it is important and instead responding to the needs of users

Project management as a new skill and way of organizing liaison work

Moving away from services that are no longer working or of value to users

Responses to the question “What scares you the most?” were also on a spectrum, with such answers as being anxious about the “general reluctance to change” in the library profession to “the thought of going to department meetings.”

What “scared” liaisons the most included:

- Libraries are offering everything in a desperate attempt to keep the ship from sinking, spreading themselves too thin to stay relevant.
- The risk of irrelevance leads to exhaustive and exhausting re-imagining of library services and values.
- As a profession, librarians are afraid of change.
- Liaisons are overcommitted and have way too much to do, “boundless workloads” and “increasing workload.”
- Libraries’ core values are being lost.
- Liaisons’ lack of self-confidence in what they offer undermines what they do; others see their anxiety.
- Higher education and libraries are losing their way and forsaking the long humane mission in favor of mere business.
- Giving up services that librarians value personally because of trends in the profession.
- The movement away from subject expertise.
- The idea of abandoning reference—it is a fundamental part of the image of the library.

The final question asked liaisons to ponder what kind of support they need from library administrators. The general trend in the responses was the need for administrators to support training, reskilling, and professional development for all new areas and to define expectations for librarians.

Here is a summary of what the liaisons said:

- Continue to provide training and reskilling for staff with changing jobs.
- Make liaisons part of the process and ask for feedback.
- Provide a wider campus context for liaisons by inviting university administrators to talk to librarians.
- Create time for more strategic thinking and less operational doing.
- Set a clear mission that frames the value propositions for both users and staff.
- Identify what the library does best and try not to do everything; understand the limits of staff time and energy.
- Advocate for library services to university administrators and funding agencies.
- Open doors to academic departments.
- Allow more time to be spent with academic departments by reducing the number of library meetings.
- Be open to failure and experimentation when exploring new models.
- Encourage teamwork.
Institutional Meet-ups

The final group activity for the institute included short meet-ups by institutions where the liaisons shared with their respective associate university librarians their first impressions of how the event had gone and what they thought next steps pertinent to their institutions or individual work might be.

It is perhaps significant to note that during the planning process, we debated whether to include Institutional meet-ups in the Institute. Some members of our planning group felt institutional colleagues should wait to meet until they returned to their campuses, and others felt that it was important for them to meet right away. Ultimately, we decided to build institutional meet-ups into the program, and judging by the feedback we received, this was the right thing to do. Balancing time spent with one’s own institution with time spent with attendees from other institutions, and the value of providing an immediate forum for institutional colleagues to process and discuss what they learned and what their next steps might be, while everything was still fresh in their minds, seems important to note.

Feedback

At the end of the institute, the organizers distributed a survey to all participants with three questions:

1. What did you like about the content of the Library Liaison Institute? When answering this question, please think about the usefulness of the presentations, exercises, and professional connections you have made.
2. Thinking about the items in Question 1, what, if anything, would you change about the institute?
3. Please comment on the logistical planning of the Library Liaison Institute, taking into account refreshments and meals, accommodations, transportation, and anything else not related to the content of the institute.

Question #1 received 38 responses, and Questions #2 and #3, 37 each.

A summary of the responses to Question #1 reveals that the components that were most valued included:

- The opportunity to meet with colleagues from other institutions. Participants commented that it was “amazing to meet new colleagues,” they “really, really loved being able to connect with colleagues,” and repeatedly singled out meeting new colleagues outside of their home institutions, the conversations, the professional connections, and mixing with senior administrators as being particularly valuable.
- The content and pace of the institute received many positive comments, including feedback on the mixture of presentations, discussions, and active learning.

Of the specific program elements, the following received at least one (or more) positive comments:

- Scenario exercise (8 highly positive comments). Participants found it thought provoking, very engaging, and singled it out as the best part of the institute.
- The Cornell Arts and Sciences dean’s presentation (7 positive comments) was described as “enlightening” and “most useful.”
- Customer profiling (6 positive comments)
- Personal reflection exercise (4 positive comments)
- Value mapping (3 positive comments)
- M.J. D’Elia as facilitator (3 positive comments)
- Assessment librarians presentations (3 positive comments)
- Meet-ups by institution, which took place at the end of the institute (2 positive comments)
Of the rest, each of the following received one positive comment: Anne Kenney’s presentation, Judy Ruttenberg’s presentation, the advance readings, the opening evening reception and its successes/failures exercise, and the Twitter conversation.

In response to Question #1, participants provided some recommended improvements to content-related elements:

- Value proposition exercise (6 negative comments). Some participants felt that it could have been shortened, streamlined, and customized; others found it exhausting and not explained well, as well as only marginally relevant to libraries. The “business speak” was found by some to be objectionable. One participant commented that the program should have included more on scenarios and less on value mapping.

The remaining suggestions for improvements referred to the relative length and/or prominence of various program elements. Participants wished for more of the following:

- More participants from outside the library and more time to engage with them (3 comments)
- More time, especially for informal interactions, including a slightly more flexible schedule (3 comments)
- More opportunities for changing discussion groups and even “forcing” people to change tables (3 comments)
- More clearly articulated goals (2 comments)

These suggestions appeared only once:

- Less mediation in exercises (the participant felt they were too scripted)
- More time allotted for individual institutional meetups at the end of the institute
- Provide profiles of the liaison programs at each institution for context
- Reference/discuss the pre-institute readings that participants were asked to review in advance
- Include presentations/talks by liaison librarians
- Provide more continuity between presentations and exercises
- Shorten the institute to a single day
- Group liaisons by broader subject areas
- Some activities were too abstract
- Some activities were not predictive enough
- The “snowball” exercise was not appreciated
- The suggestions for change in how liaisons do their work were not appreciated

Two comments stood out: In the discussion of future scenarios, one participant commented, “Some colleagues had trouble getting beyond ‘no, we can never do that,’” but another observed that he/she is now “compelled to look for recent literature and consult with my own faculty to reassess needs.”

In response to Question #3, participants overwhelmingly commented very positively on two things: the planning and hosting for the institute and the food. The arrangements were found to have been “great,” the event “beautifully coordinated” and “fantastic,” the hosts “welcoming” and enthusiastic,” and the planning committee deserving of a big “THANK YOU.” The reception and its venue were specifically mentioned in very positive terms a number of times. The food was found to be of “great variety” and very “healthy.”
Specific suggestions for improving the experience included better accommodations (the dorms were found “adequate” at best), a shuttle for the mobility-impaired, a better location (the meeting room was found to be too small and too noisy for that many people and the acoustics inadequate); and more environmentally aware choices (e.g., no bottled water and provide composting bins). A suggestion for providing tours of Ithaca was also included.

**Observations and Next Steps**

**Observations**

As the Library Liaison Institute organizers pored over the data collected during the institute and the feedback given by participants, several themes surfaced.

One of the most salient “lightbulb” moments during the institute occurred when a participant referred to liaisons as “stem cells,” meaning that liaisons are not defined by one specific quality but can (and should) grow into whatever is needed by the ever-evolving activities in research, teaching, and learning. As appropriate as the metaphor seemed, the institute organizers couldn’t fail to notice that it seemed to clash with long-held cultural assumptions and values of many of the liaisons in the room.

Of these long-held values, perhaps the strongest was the idea of liaisons having deep disciplinary subject expertise, despite ARL data showing otherwise. Whether it is a vestige of a past identity-construction or a symptom of anxiety in the face of an ever-changing array of possible interventions in the research process for which liaisons may feel less than ideally prepared, it was clear that many of the participants used the knowledge of a discipline or the ownership they felt of their faculty as a measure of good liaison work. Also, the emphasis on subject expertise probably at least partially accounts for the fact that some liaisons missed how much library work is shifting to functional areas, such as copyright, intellectual property rights, digital research, etc.

Another mind-set that appeared was that of a “maker culture,” i.e., the idea that “if you build it, they will come.” This was combined with a sense of liaison work being about service, not about outreach, nor about revealing possibilities that researchers might not be aware of—be they interdisciplinary connections where research is more and more about trying to solve “big world problems” that don’t lend themselves to sharply defined disciplinary silos, or about the larger higher education environment, which affects research in new and sometimes unpredictable ways.

The idea of service manifested itself in another way, as well. Liaisons (and perhaps librarians in general) tend to have difficulty saying “no” to faculty and, since their contacts are individual faculty, whose problems revolve around specific teaching/research/access problems, solving these problems for faculty takes precedence over anything beyond the immediate need. Liaisons in particular often lack contact with university leaders who might have a different focus, or with library administrators who might be unaware, or worse, dismissive, of the feelings of work overload, and the extent to which subject expertise, reference and instruction, and a sense of service define liaison’s professional identity.

Another ramification of the service culture is the fact that the work librarians do is often conceived of as being about the librarians, about the library, and not about the larger institutional ecosystem in which the library operates. Additionally, because of this inward focus, librarians tend to be unable to see or imagine the impact of their work in the context of solving larger institutional problems. The institute organizers believe that librarians’ success is no longer about the library looking good and by extension librarians looking good, but success is when the library is
a part of collective problem solving at the university level. Institutional success is what matters and the library’s willingness to be a vital and dynamic partner in that success will define its position at its institution.

**Next Steps**

Considering these observations, what does the road ahead hold and how are Columbia, Cornell, and Toronto going forward?

As managers, the biggest need that the institute organizers saw for liaisons was and is the need to find ways to see the “big picture” and understand and advance institutional priorities as well as individual faculty concerns. This necessarily translates into managers taking the time to understand the “big picture” of their institution and clearly communicate those larger institutional priorities to liaison staff. Lack of communication about institutional goals produces problems for managers in mentoring liaisons. And when the university structure is not understood, outreach/liaison models may be perceived by liaisons as irrelevant or inefficient. Helping liaisons understand the big picture requires investment in training for managers and liaisons (both in core competencies and communication skills that provide the ability to look beyond the library as the center), but also an organizational structure for liaisons to collaborate (among themselves, with functional experts, beyond the confines of their departments or disciplines). Setting up a team-based model might be one way to encourage such collaboration. A broad disciplinary cluster, which enables sharing of information, ideas, responsibilities, and succession planning, augmented by a close collaboration with functional expert teams (on research data management, public access mandates, author rights, digital scholarship tools, etc.) would enable efficiencies of engagement, as well as common messages and consistency of service.

One of the areas of potentially greatest impact is assessment and evaluation of liaison work. On the one hand, libraries’ data about users is limited, and liaisons need to find ways to collect more data faster, so that evidence of current and emerging user behavior and practices will guide liaison practice. On the other hand, complex evidence needs to be translated into actionable steps that librarians can take together. The goals of a liaison program should be concrete, measurable, and attainable. Perhaps most importantly, libraries need to honor what has been asked of liaisons in the past (administrators should take responsibility for the current understanding of the liaison role—reference, instruction, collection development), but communicate a changed expectation and realign metrics and incentives to reward liaisons for meeting new expectations. Libraries need to assess liaison work as part of performance evaluation and set clear professional advancement rewards that incentivize meeting the institution’s current and future goals. A focus on impact and outputs rather than inputs would facilitate the transition from a “service” culture to an understanding of the library as a revealer of possibilities.
Here are some of the concrete next steps that Columbia, Cornell, and Toronto are taking as a result of the Library Liaison Institute.

**Columbia University**

The Columbia University Libraries is beginning a strategic direction process that will unfold over the 2015–16 academic year. The goals of the process are to:

- Connect directly to the themes emerging from the university’s capital campaign, as well as to strategic plans of Science, Social Science, and Humanities Divisions; to the college’s emerging goals for student success; and to the Columbia University mission statement.16
- Define [up to five] strategic areas of opportunity for the libraries to be a dynamic and vital partner for the university, with a focus on what difference/impact the libraries are going to make.
- Make decisions on allocating and organizing resources (and/or identify the amount to be raised) to increase the libraries’ impact across the strategic directions.
- Engage as many staff and stakeholders as possible in finding and connecting the dots via strategic thinking.
- Improve organizational effectiveness through a process of strategic thinking and goal setting; emphasize professional development—taken most broadly to include knowledge transfer, leadership development, and staff support and development—as a key methodology for improving organizational effectiveness.

This strategic direction process will enable a structure to begin to redefine liaison work in the context of larger institutional goals. The process will involve meetings with stakeholders across the university including faculty, divisional deans, the provost, and other campus administrators. Liaisons and all library staff will have the opportunity to hear from the provost, something that has not happened for many years at Columbia.

On a smaller scale, the ARL Library Liaison Institute introduced methods that the libraries have already integrated into its divisions. The value map exercise was used in a recent staff retreat in the Science Division. The entire division was introduced to the exercise and it was used to drive the program in the science libraries in the coming year.

The theme of staff training and reskilling that surfaced at the institute has also influenced the libraries’ thinking as they look to broaden their focus to better meet user needs. The libraries have begun to explore training options and opportunities in the areas of project management and research data management. Administrators also expanded a division-specific training program, developinglibrarian.org, to include other divisions.

Finally, the libraries addressed a recent vacancy in the Journalism Library with a new approach to filling the interim position. A team of librarians from the science, social science, and humanities libraries was created to fill the interim journalism librarian position. The libraries see this team approach as a possible model going forward for permanent positions, breaking down disciplinary silos and better integrating research methods.

**Cornell University**

After disseminating a summary of the institute to all liaisons at Cornell, not just the participants in the institute, the library held an all-liaison meeting, to which all functional experts were also invited. Approximately 50 people attended the two-hour meeting planned by the Cornell University Library Liaison Steering Committee and sponsored by the associate university librarian for Research and Learning Services and the associate university librarian for Collections and Digital Scholarship. The overarching goals of the meeting were to look at the big picture of how research, teaching, and learning are changing globally and at Cornell and delve deeper into the results of the recent faculty survey, this time not looking at the faculty’s comments about specific concerns they have (e.g., needed access
to a resource, frustration with a discovery platform) or the praise they have for the library, but focusing on what they identified as the top challenges (pain points) in their research and their teaching. Additionally, the Liaison Steering Committee hoped to identify areas to focus on at the system level, elaborate SMART goals (specific, measurable, attainable, realistic, and timely), and get training in and practice crafting “sticky” (memorable) messages about outputs and impact that shift the focus from the library to the user.

The Liaison Program Steering Committee had identified 10 big areas of potential impact and offered some examples to start the participants thinking:

- Fostering Critical Thinking (reference and instruction interactions)
- Enabling New Forms of Publishing (open access, artist books, e-book options)
- Managing Research Data (spreadsheets, large data archives, study image archives, massive data warehouses)
- Promoting Visibility of Faculty Scholarship (measuring impact factor, library programming, collection development)
- Using Library Spaces to Promote and Foster Student Scholarship (student poster sessions, maker spaces, course-based instruction in library collaborative spaces)
- Educating Faculty and Students about Author Rights (Creative Commons, publisher contracts, licensing images for publications)
- Organizing Personal Archives (videos, paper and/or electronic filing systems, best practices)
- Facilitating Interdisciplinary Research and Collaboration (VIVO/Scholars@Cornell, SPARK talks, collaborative spaces, venues for faculty collaboration and research sharing)
- Furthering Community Engagement/Increasing Research Impact (institutional repositories for research sharing, open access publishing support, outreach and support for communities beyond Cornell)
- Supporting the Full Research Cycle (reference support, finding grants, systematic reviews, digital humanities projects)

The five areas that were voted of greatest interest were (in this order):

- Facilitating Interdisciplinary Research and Collaboration
- Supporting the Full Research Cycle
- Furthering Community Engagement/Increasing Research Impact
- Fostering Critical Thinking
- Using Library Spaces to Promote and Foster Student Scholarship

Participants worked in groups of four or five to elaborate one to three SMART goals for a topic (each topic was discussed by two groups). After the Communication and Assessment department provided a brief overview and examples of sticky messages, also known as “elevator speeches,” each group picked one goal to craft a sticky message about.

The SMART goals and sticky messages were collected and will be transcribed and distributed to all liaisons and functional experts. The next steps will be to collectively agree on a few of those SMART goals and then replicate the exercise at unit levels.

In addition, we have initiated a competitive process of applying for a Liaison Travel Exchange Program, which, we believe, will allow Cornell liaisons to learn from and exchange ideas with their peers at other institutions.
University of Toronto

Librarians attending the institute returned to Toronto energized by the event, which added to information gleaned from the just-released external review of the library’s liaison program. On return to Toronto, participants were interested in thinking further about ways to advance faculty engagement in a complex multi-library, multi-campus institution and eager to consider all aspects of faculty engagement, not just the liaison program.

The library held a follow-up meeting for all institute participants from Toronto in July, to consider next steps. The group brainstormed activity ideas and volunteered to work on several projects including:

- Share out a summary of the event for staff who did not attend (done). Participants felt strongly that their colleagues needed to be informed about the Cornell activities and their value.
- Repeat the institute’s value propositions exercises with more library staff at Toronto (done).
- Visually map all of the existing points of faculty engagement across the library system, to better understand the variety, complexity, and possible gaps in this area (in progress).

In addition, library leadership committed to:

- Meet with library departments to discuss options for improving faculty engagement, which would consider both the ideas emerging from the institute as well as recommendations from the external review of the liaison program.
- Seek feedback from other stakeholders (specifically key faculty/senior academic administrators) at the university regarding the external review’s recommendations.
- Offer project management training to interested library staff, in order to better equip staff to lead library teams.
- Support temporary librarian exchanges to other areas, to enable librarians to better understand and engage with their colleagues in other departments or libraries and to build skills and capacity.
- Support and encourage additional pilot projects to test the strength of cross-functional teams for specific projects or outreach activities. Several teams have been formed including projects related to faculty workshops, open access compliance for research grants, undergraduate library research awards, and a student-led journals forum.

Much of Toronto’s work over the coming months will focus on strengthening faculty engagement with extended organizational conversations and consensus building, followed by needed adjustments to improve internal teaming and enhance outreach to faculty on emerging library services. The library will use evidence from the institute, its own internal liaison assessment activities, and the external review of the liaison program to inform these conversations and outcomes.
Endnotes


3 Latta, *Liaison Services in ARL Libraries*.


5 Ibid.


7 José Diaz (Ohio State University), Peggy Fry (Georgetown University), Melissa Just (Rutgers University), Anne Kenney (Cornell University), Kelly Miller (University of California, Los Angeles—now at University of Miami), Karrie Peterson (University of Pennsylvania), and Rita Vine (University of Toronto).


10 These presentations are summarized only briefly since they were recorded and are available at:

- Anne R. Kenney, “Liaison Futures: View from a University Librarian,” [https://youtu.be/6Qg3W9PDDmE](https://youtu.be/6Qg3W9PDDmE);
- Gretchen Ritter, “A View from the University: Where Does the Library Fit?”, [https://youtu.be/Qn7tUqDo1hs](https://youtu.be/Qn7tUqDo1hs).

The slides are available at [https://drive.google.com/drive/folders/0B4Ht68H8AzuHNzRyS3BrWHB6a8](https://drive.google.com/drive/folders/0B4Ht68H8AzuHNzRyS3BrWHB6a8).

11 Barbara Rockenbach’s introduction to the scenario exercise is available on video: [https://youtu.be/ZHSF-aeTRj4](https://youtu.be/ZHSF-aeTRj4).
12 See the summary of the customer profiling exercise—described in the “Creating Value Propositions by User Group: Focus on the Liaison Customer” section below—for a better understanding of a process for uncovering the issues, or pain points, that the library can play a role in addressing.

13 The slides are available at https://drive.google.com/drive/folders/0B4Ht68H8AzuHNzRy53BrWHB6am8 and are only briefly summarized here.

14 The use of the term “customer” was by no means universally accepted both at the institute and in the planning discussions. The planning committee decided to use it to challenge liaisons to consider outreach and marketing.


Further Reading


Appendix 1: Liaison Librarian Institute Agenda

ARL LIAISON LIBRARIAN INSTITUTE

WEDNESDAY, June 10, 2015

6:00 – 8:00 pm  Welcome Reception  
Baker Portico, Physical Sciences Building

THURSDAY, June 11, 2015

8:00 – 8:30 am  Breakfast  
160 Mann Library

8:30 – 8:45 am  Welcome: Anne Kenney, Carl A Kroch University Librarian, Cornell University  
160 Mann Library

8:45 – 9:00 am  Introduction: Judy Ruttenberg, Program Director for Transforming Research Libraries, Association of Research Libraries  
160 Mann Library

9:00 – 9:15 am  The Future of Liaisons: Barbara Rockenbach, Director, Humanities and History Libraries, Columbia University; Rita Vine, Head, Faculty and Student Engagement, University of Toronto; and Kornelia Tancheva, Associate University Librarian for Research and Learning Services, Cornell University.

9:15 – 10:15 am  Discussion of “Future Scenarios” in small groups

10:15 – 10:30 am  BREAK

10:30 – 11:15 am  Discussion of “Action Items”

11:15 – 11:30 am  BREAK

11:30 – 12:00 pm  A View from the University: Where Does the Library Fit, Gretchen Ritter, Dean of the College of Arts and Sciences

12:00 – 1:00 pm  LUNCH

1:00 – 1:30 pm  Faculty & Students Perspectives – “What the data tells us”

1:30 – 2:45 pm  Customer Profiling

2:45 – 3:00 pm  BREAK

3:00 – 4:15 pm  Value Map

4:15 – 5:00 pm  Summary

5:00 pm  Dinner on your own – groups will be formed

FRIDAY, June 12, 2015

8:30 – 9:30 am  Breakfast  
160 Mann Library

9:30 – 10:00 am  Personal Reflection

10:00 – 10:30 am  Institutional Meet Up

10:30 – 11:00 am  Final Summary & End of Program

11:00 am  Boxed LUNCH provided
Appendix 2: Best Practices for Library Liaison Institutes

The ARL Library Liaison Institute held at Cornell University in June 2015 was planned and implemented by a small committee of ARL staff and librarians from Columbia University, Cornell University, and the University of Toronto. The committee worked together for eight months on planning. Mid-way through the process, the committee brought in an outside consultant and facilitator, M.J. D’Elia. Below are lessons learned about planning the institute and suggestions for those hoping to host a future Library Liaison Institute.

**Have a clear goal and stick to it.** The goal of the 2015 ARL Library Liaison Institute was to zoom out from a focus on what liaisons do (reference, instruction, and collection development, for example) and instead focus on the “big picture” of how liaison work contributes to the strategic goals and plans of the institutions in which they work. The idea was to challenge liaisons to think about how they can begin to solve the problems that faculty and university leaders face and consider how and if the services librarians currently offer contribute meaningfully to faculty needs.

**What to expect from the institute.** Keep expectations modest. The institute is a starting point for conversation, not an end point. Expect a variety of opinions from the liaison community on what faculty want and need. Based on a survey at the conclusion of the 2015 institute, liaison librarians left with their existing belief systems intact, but they had a new appreciation for how opaque their library services can appear to the communities they work with at their institutions.

**Pick your partner institutions with care.** The partnership among Columbia, Cornell, and Toronto worked well because the institutions were similar, but not identical. All three institutions had a multi-library structure and similar status in the research library and higher education communities. These similarities enabled liaisons from different institutions to easily understand one another’s positions and perspectives. Geographic proximity was also important for logistical reasons, such as transport and housing participants at library expense.

**Establish a planning group early and meet regularly.** The 2015 institute planning group met early and often. Advance planning of at least eight months will likely be required in order to reserve housing, meeting space, facilitators, and the schedules of senior university administrators, who are so crucial to communicating with participants about the larger institutional context.

For the 2015 institute, the three partner institutions made the decision in October 2014 to hold a June 2015 institute. The first planning meeting, of the three top-level liaison coordinators, was held in November. All accommodation and space bookings were finalized by December. In January at least one liaison librarian from each institution was added to the original planning team, and several more at Cornell to support local arrangements. The entire group held weekly phone meetings until the institute took place.

The combination of liaison librarians and top-level coordinators on the planning team was essential to the success of the event. The planning group benefited from the liaisons’ perspectives, particularly related to preferred activities and exercises. Top-level coordinators need to be mindful to ensure that liaisons feel that they have a voice in planning, particularly if planning meetings do not take place in person.

**Travel and lodging considerations.** It was beneficial to both travel together and to house all participants together in a single location, as it provided opportunities for continued interactions during unscheduled times. Dorms
were used to house participants at Cornell, which worked well for most participants. There were several complaints, including reports that some librarians decided not to apply at all for the institute because of dorm accommodation.

It may not be easy for liaisons to mingle with colleagues from other libraries, so including events and activities that encourage a social element can be helpful. The 2015 institute began with an opening reception (with a “talk-about-this” icebreaker) and an unscheduled evening (with dinner outing sign-up sheets).

**Facilitation.** Facilitation is crucial. The 2015 institute was facilitated by a professional facilitator who is also an academic librarian. His familiarity with the research library community enabled him to understand and challenge key assumptions without inflaming. The facilitator was included in weekly planning meetings during which he presented proposed exercises and activities, which were discussed and approved by the planning team.

**Space considerations.** Ensure that the space used for day-long events has windows, adequate ventilation, and sufficient space for flexible group work. Details like supplies, nearby restrooms, comfortable chairs, and table space for group work are vital to a successful event.

At Cornell a local arrangements committee worked with an excellent campus caterer that offered a range of creative, modern food choices. Breakfast and lunch were both catered on site to permit continued conversation, which proved to be important. Participants want to be surprised and delighted by food choices during a busy and demanding day. Event feedback reflected how much food matters.

**Who should participate in the institute?** It worked well to have a nearly equal number of liaisons from each participating institution. Fifteen liaisons were chosen from each institution, and the assessment librarian from each institution also attended, making a total of about 50 participants. It also worked well to place people at specific tables so that any managers and their supervisees did not sit together.

Some institutions selected their participants and others opened participation up to an application process. The top-level coordinators, all members of the planning committee, intentionally did not participate in the exercises, but kept the proceedings running smoothly and taking notes and tweeting throughout to provide a record of the event.

Libraries may want to consider pre-event preparations with their library’s participants, both to create a sense of group cohesion and also to prompt them thinking about the future of liaison work. The planning team agreed on three articles that all participants were asked to read and reflect upon before the institute. Individual libraries organized meetings with their participants devoted to organizational details and discussions about the readings.

**Ideas for an institute agenda.** The 2015 institute agenda contained a mix of listening and talking. The agenda for the first evening was light, to provide an opportunity for liaisons to meet one another during a buffet reception and to share ideas of faculty engagement initiatives that either worked or didn’t. The full-day event that followed provided most of the listening in the morning, so that liaisons could understand the context of the institute and had a baseline for dialogue. A discussion of potential future scenarios was a kick-off to the active portion of the institute in the afternoon.

To provide further context, a history of liaison work and the ARL data on liaison educational backgrounds is helpful, especially for newer liaison librarians. Given the goal to broaden liaison perspectives, it was also important for liaisons to hear the voice of senior university administrators early in the event. It is recommended that, if you are able to arrange for university leaders (provost, deans, etc.) to speak, you ask them to talk not about the library, but about issues “that keep them up at night” in the areas of teaching, research, reputation, and the future of the university. If those leaders aren’t available, summarizing top-level university planning goals in a presentation may provide a serviceable proxy for the real person.
Above all, avoid the temptation to squeeze more activities than can reasonably fit into available time. It takes time to hear all voices, and time to let participants challenge and reimagine their beliefs. An experienced facilitator can help you keep the timing on track.

**Have a plan for capturing the institute in real time.** It is easy to forget many of the details of your institute if the event is not captured in real time. Two members of the planning team took notes and live-tweeted throughout the 2015 institute, and captured the hashtagged content into a shareable Storify project. Almost 100 photos were taken at all stages of the event to help bring the event to life for those who were unable to attend and would read about it later.

For further documentation, retain all slide decks, worksheets, and marked-up flipcharts. They will be helpful later on, both to memorialize the event and also to remind you of important ideas that were captured on them.

Creating a sharable summary of your event for the larger ARL research library community is also recommended. The issues and challenges facing liaison librarians have more similarities than differences at ARL institutions. Both managers of liaisons and liaisons themselves will welcome the opportunity to read and learn from them.

The planning committee also carefully planned how event evaluation and feedback would be solicited. Before the event, consider a simple form that encourages textual feedback about content as well as comforts. The planning committee for the June 2015 event sent the link to the form to all participants the day after the event, with a follow-up reminder after three days. Wait too long, and memories become fuzzy.

**Follow up with your library’s participants post-event.** The 2015 institute concluded with time for participants to reconvene with their own library colleagues to recap key takeaways and consider next steps for their own library.

Institutes like these will become distant memories unless local planning committees keep them alive. Reconvene your participants soon, so that they can provide leadership and extend the reach of their experiences to those unable to attend. If possible, replicate some of the exercises, using external facilitators if needed, in your own library.