



October 21, 2013 Q&A Supplement to New Roles for New Times: Transforming Liaison Roles in Research Libraries Webcast, September 27, 2013

Question 1 – Answered by Janice Jaguszewski

Great stuff. Can you say a little bit more about “systems thinking?” How do you define this? How can a librarian gain this?

Systems thinking considers the various components of a system, in this case, a library. How do our users experience the people, services, online tools, collections, physical spaces, etc., that make up the “library?” Where do liaisons fit within this system, and how do their contributions interact and integrate with other components of the system? Elements of this system could include a library’s mission, vision, and values, its human resources and liaison roles, user needs, structures (e.g. position descriptions, strategic directions and goals, performance review process, organizational structures and programs), systems (assessment, continuous process review, ability to let go of processes in order to gain capacity for new directions), and resources (campus partners, funding sources). Liaisons (and all libraries staff) benefit from understanding the larger picture and recognizing how all the parts fit together to provide an exceptional user experience. This understanding provides a foundation from which to anticipate and adapt to changing user needs.

At the University of Minnesota Libraries, we invited a faculty member from our Business School to offer a presentation for all staff on systems thinking. Our Organization Development unit then followed up with a workshop. But there are books, YouTube videos, etc., that explain and expound on the concept.

Question 2 – Answered by Barbara Dewey

Can you speak more about “short term hiring” and how it works or should work?

Some libraries are developing term appointments, 1-2 years, to launch a program and determine what is needed in the long run. The CLIR Fellows are examples. Post-MLS residency programs are another example of term appointments, often two years.

Question 3 – Answered by Barbara Dewey

(Barbara) Can you repeat the four traits again?

In summary, the four traits needed for new roles for new times in a new world, now and in the future, include: Proactive, Creative, Self-directed, and Willing to partner.



Question 4 – Answered by Catherine Soehner

What can academic libraries learn from the medical library model, and how well will this scale to engaging the entire campus?

I'm assuming what you mean by this is the embedded librarian model where a librarian's office is no longer in the library but is located in the department or institute they serve or where they are part of research groups (librarian on "rounds" can be translated in many other ways). There are other definitions of "embedded" including collaboration wherever possible to make sure that library services are integrated into faculty and student workflows. This broader definition is more scalable since being embedded will depend entirely upon successful collaborations. As librarians and library staff are considered pivotal to research, grants can assist with scaling up, adding additional staff, and increasing the reputation of the vital need for the library on campus.

Question 5 – Answered by Greg Raschke

The report was based on interviews with five specific institutions. To what extent have these institutions evaluated these changes in terms of the users? Not from within but truly from the perspective of the user through interviews with them, etc. Were these changes made based on collected data from the users? Often libraries get caught up in trendy changes without basing it on much but opinion. Hence the question.

NCSU's evaluation of these changes has centered on a handful of indicators and evaluative models. Three data points and trends, which are evident at almost every institution, indicate a decline in demand for traditional liaison activities. Reference inquiries, including a steep decline for in-person, in-library consultations, have declined almost universally and at a significant rate. Print circulations have seen similar downward trends. Finally, the Ithaka surveys of faculty from 2006, 2009, and 2012 indicate a clear shift in what faculty generally value from roles they associate with the library. Together we have associated those statistical indicators in part to a decline in demand for some traditional liaison roles and services. Faculty are certainly coming to the physical library much less than in past decades, with that trend accelerating over the past six years. Those trends call for a realignment of certain liaison activities and services (while acknowledging that faculty use the collections more than ever and still value the purchaser role of the library more than any other role).

We have used empirical observation and the anthropological interview method pioneered by Rochester to analyze which activities liaisons should emphasize as they shift away from desk-based reference service, item-by-item print book selection, certain types of instruction, etc. Dozens of faculty interviews were conducted to further our efforts to open our new James B. Hunt Jr. Library and to consider adjusting priorities for liaisons. Those interviews shaped our strategic priorities for liaisons to include working across a broader spectrum of their research



and teaching life-cycle including: 1) engaging faculty in new library spaces that aim to foster leading technologies, spaces for collaboration, and visualization; 2) research data; 3) digital technologies for teaching and learning; 4) visualization; and 5) data and advanced computation.

Other environmental factors such as funding agency requirements support these changes in strategic direction.

Question 6 – Answered by Janice Jaguszewski and Barbara Dewey

Are many ARL libraries reporting that they are investing in staff training to achieve these new competencies?

Janice Jaguszewski: Those interviews reported on a mix of approaches, depending on the skills needed. Training is being offered for those skills that can be developed. But new hires are typically needed for highly specialized skills.

Several years ago, the University of Minnesota Libraries developed and administered a self-assessment tool to all liaison librarians and archivists. The purpose of the assessment was to document the liaisons' current knowledge, skills, and abilities (KSAs) and map them against the KSAs that are expected to be needed in the future. The gaps were then analyzed to identify professional development opportunities for current staff as well as traits to seek when considering future hires.

The study was published as a book chapter: Stephanie H. Crowe and Janice M. Jaguszewski, "Preparing our Librarians for the Future: Identifying and Assessing Core Competencies at the University of Minnesota Libraries," in *The Expert Library: Staffing, Sustaining, and Advancing the Academic Library in the 21st Century*, eds. Scott Walter and Karen Williams (Chicago: Association of College and Research Libraries, 2010), 127-157, <http://purl.umn.edu/96954>.

We identified the following needs and provide our response:

1. Project management skills: over 50 libraries staff participated in two-day workshops on project management.
2. Support for developing campus-wide programs: 15 liaisons participated in a program development leadership initiative.
3. Understanding the relevance of special collections and archives and their integration into teaching, learning, and research: sessions were developed by the archivists to address these needs.
4. Instructional design skills: instructional designer hired to work with liaisons.
5. Examples of how to develop partnerships with faculty: a training plan for liaisons was developed and included checklists for establishing relationships as well as the filming of six videos of experienced liaisons describing how they developed successful relationships.



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6. Additional skills in instruction and information literacy: workshops on assessment and active learning developed and offered.
7. Ability to identify grant opportunities and develop effective proposals: a grant writer was hired.

In addition, a successful individualized development program was developed and offered for cohorts of up to 12 staff members. We are now soliciting applications for our third cohort. The program extends over several months and involves coaching, self-assessments, and leadership goals that can be put into action.

Barbara Dewey: Yes, for example, at Penn State we launched the Library Leaders Program (a two year program with a cohort of four). We are seeking our second cohort. We also launched the Diversity Residency Program with two Resident Librarians who have customized rotations in “new” areas.

We routinely send librarians to workshops, conferences, and onsite training. We also strategically invite speakers reflecting new areas to give folks a chance to hear about emerging trends and interact with these experts.

Question 7 – Answered by Greg Raschke

What does the internal liaison training look like at NCSU or elsewhere?

Internal liaison training involves: 1) a series of external speakers; 2) visits to relevant research labs on-campus; 3) internal training sessions by librarian experts in areas such as visualization, GIS, and research data management; and 4) training sessions from digital library and information technology staff on the fundamentals of using new technology and high-definition visual spaces. This training is offered under the umbrella of providing basic fluency in emerging areas of importance for subject specialists in working across the life-cycle of research and scholarship. Those emerging areas identified for the near-term are research data management, data and analytics, new technology spaces such as Makerspaces, visualization studios, and game design labs, and visualization of research. A couple of excellent reports that outline the broader context of and ideas for training sessions include <http://library.duke.edu/about/planning/2010-2012/subject-librarian-report-2011.pdf> and <http://publications.arl.org/rli265/>.

Question 8 – Answered by Catherine Soehner

As we shift our priorities to focus on working with campus partners and outreach, what do you see as the continuing role of in-library service points?

Statistics and survey data are useful in determining the future of in-library service points. What kinds of questions are being asked at these service points? Do the questions demand the expertise of a librarian, or can those questions be generally answered by staff or student employees? If use statistics are declining or if a



majority of questions can be handled by staff or student employees, why not move librarians off the desk and establish a referral service for those questions that require in-depth research skills? These strategies free up librarian time to pursue more campus collaborations and reach out to more faculty and students.

Question 9 – Answered by Catherine Soehner

Do you think libraries struggle with communicating their role as more than a library? Because no matter how much changes on the inside – if people don't know about it, then the perception remains the same. What are libraries as a team doing to communicate to their audiences?

I think libraries struggle with the recurring image of a library that is only about physical books and journals and that our role is to check out books. One way to combat that is to establish campus connections and collaborations that demonstrate our value to the teaching, learning, and research enterprise. Word of mouth is a powerful marketing campaign. Another method in combating the image of a traditional library is to make sure the services we offer add value to work of our faculty and students. Developing valuable services begins with listening to how faculty are working and where they frequently need assistance.

Question 10 – Answered by Janice Jaguszkewski

There was some mention of the importance of liaisons serving both as advocates and consultants. The consultant role seems pretty obvious...can anyone say more about the liaison as advocate?

With an outwardly focused engagement model, liaisons are in a perfect position to market and promote the library's services, online tools and resources, and expertise to faculty, staff, and students in all disciplines. They can tailor their message to specific audiences and respond to their needs as they learn with them, whether one-on-one, in departmental meetings, with groups of associate deans and department heads, to student groups, etc. Liaisons have become an excellent sales force. An advocacy role requires that liaisons be proactive, outgoing, and creative – able to effectively communicate services in terms of the benefits they provide faculty and students.

Question 11 – Answered by Greg Raschke

What are some of the demerits of the old tripartite model?

Investing time in activities that are declining in demand and impact among the user community.

Diffusion of skills and energy across such a broad spectrum of activity that makes it difficult for liaisons to gain skills in new areas and invest time in incubating new, potentially valued-add, services for researchers.

**Question 12 – Answered by Greg Raschke**

Do you have ideas about assessment of training programs in this new paradigm, given the evolving environment?

An excellent question. Large quantitative indicators are unlikely to emerge in the near-term. More anthropological-style inquiry, empirical observation, and anecdotal evidence will need to be combined in assessing the effectiveness of training programs and their ultimate impact on services. Another soft indicator that should be useful is the nature and extent of partnerships between library / librarians and faculty / research enterprises on campus. Any indicators that can tie liaison activities in new paradigms to research funding will be welcome, but likely difficult to directly connect without extensive trial, error, and further analysis.

Question 13 – Answered by Catherine Soehner

What is the future of reference services? Sometimes there is a reluctance to let go of the general reference services to try out new roles/models. How would you encourage those who are wedded to the traditional models to try out these new roles/models?

It is difficult to argue with data. Data-driven decisions work well for selling changes to our users and for selling change to the people providing services. Pilot projects are also useful tools for trying out a new way of doing things as long as there is a planned assessment so that data can inform the next steps.

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