Notes from ARL Liaison Supervisors Meeting, Denver, Colorado

Monday, February 12, 2018

Panelists:

- Jessica Clemons, Associate University Librarian for Research, Education, and Outreach, University at Buffalo
- Don Gilstrap, Dean of Libraries, University of Alabama
- Barbara Rockenbach, Associate University Librarian for Research and Learning, Columbia University
- Lea Starr, Associate University Librarian, Research Services, University of British Columbia
- In addition, we have incorporated notes received from colleagues who were unable to attend but kindly provided their observations: Marcy Simons, Organizational Development Librarian, Hesburgh Libraries, University of Notre Dame and Steve Witt, Associate Professor; Director, Center for Global Studies; and Head, International and Area Studies Library, University of Illinois at Urbana-Champaign

What were your biggest takeaways from hosting an ARL liaison institute?

Disconnect about the importance of librarianship—there is often a misunderstanding about what we mean when we say ‘subject specialist’ and ‘liaison’ and we realized that it was important to clarify the range of activities expected.

It’s important that the scenarios (that are used to prompt ideas about the library’s future) are deliberately provocative—this forms an important part of the conversation

Our institute had 50 liaisons in attendance, many with a strong adherence to subject expertise and identity as *subject* librarian. But there were others in the room who asserted that their expertise was ‘library expertise’—things faculty don’t have expertise in—that we have our own professional expertise, and it was useful to hear those voices.

Our library’s institute included a scenario exercise and a snowball exercise (where participants privately write down what scares them, what excites them, and what they want library administration to help them with, then roll up the papers and hurl them into the center of the room. Facilitators share the anonymous feedback as a closing exercise in the institute.). We were surprised by all the energy and enthusiasm; many realized that we have newer units that they may not have been aware of. They also realized that some of the more exciting work was happening in these new positions so were engaged in discussions, some wanting to be a part of these new opportunities and looking for ways to do that.

Timing is important. After we conducted a value proposition exercise, there was a change in leadership, so we lost the context for why we were doing this, what we wanted to get out of this. It might have been better to wait for the changeover.

The people who were most resistant to changing roles and work were also the least knowledgeable about the changing roles of the library, despite the training we provided ahead of time; we found that we had to eliminate words like ‘subject specialist,’ ‘bibliographer’ and say ‘liaison’ from then onwards, the language had meaning.

We learned a lot about how our liaisons have started to embrace change, and many are more open to new things than we thought.

Even the resisters engaged in the discussion and thought process; we also found that people outside the liaison program added tremendous value to the conversations, and were helping colleagues who were struggling to get themselves to the place they needed to be

Try to have introductory remarks at your institute from a provost, dean, someone who can give a big picture context—otherwise librarians keep seeing the library as the university, rather than part of the larger institutional context. The voice of the provost can bring in a broader perspective if they avoid praising the library and instead share what keeps them up at night, how the library can be part of their solution, that’s how we get at impact. An interesting example was how the library can be involved in student health and mental wellness and really think about solving campus problems, not library problems.

When the provost says something, it has deeper meaning than when the university librarian says the same thing.

The intersection between functional specialists and conventional subject librarians is interesting and challenging; this has implications for the liaison role.

There are many different kinds of liaison librarians, including those who are not traditionally thought of as subject specialists. That signals a large shift in liaison work, we need to be more thoughtful about how we describe liaison going forward.

Speaking of the intersection between functional specialists and liaisons, how do liaisons and functionals know who’s talking to whom? How do they (or do they) keep each other aware of who is doing work with “their” faculty members?

More liaisons are opening up to doing new things than we thought they were.

Liaisons are concerned there’s more and more work, and that they need to figure out what to stop doing, but that is difficult. Some of our functional specialists are trying to bring people along, but some subject specialists are nervous about stepping into new areas.

A week after our institute, we held a debrief. People who had been there a long time were saying ‘this is not new information’ and ‘we’re just having the same conversation, but not doing anything.’ But after the institute, the AUL can say ‘now we have common understanding, joint discussions, we’re moving on and action starts now.’ Can have rich conversations about what we do—we don’t really know that yet, don’t have data on that yet—can heal some old wounds, broaden and enrich the conversation.

Can you share with us some new activities that your liaisons are engaged in? Where are you seeing shifts, where are you seeing gaps?

We are providing more public fora that focus attention on both library specialist knowledge and what's happening in research and teaching on campus (e.g., a series exploring the research process of scholars, including their methods and resources needed).

Some liaisons work directly with research data services and scholarly publishing, some are reviewing data management plans, curation of data in local repositories, managing institutional repository communities, working on creating a game with a local museum; becoming members of research teams; getting involved in community partnerships.

We began a curriculum mapping project, got lots of syllabi from faculty, quite willingly; faculty worked well with librarians. We are working on a list of best practices for liaison work moving forward. We began to map liaison goals to faculty activity report goals.

Liaisons were gung ho to tackle big data after the event—energy, positive attitude was there.

We stressed face to face meetings with faculty, and encouraged them to be tenacious with faculty. The message came from the university librarian. We encouraged our librarians to walk over and drop in to faculty office hours to chat.

We held a new faculty panel at our institute—5 faculty members from various disciplines, from Arts to Geology—who had discussion with each other. It was special to have new faculty there, who could discover more about library and each other at the event. There was tremendous follow-up from that experience and from hearing those voices.

We worked with a list of questions that liaisons can ask to open up the conversations with faculty—one of the outcomes from that was a comment from one of most embedded librarians who said she learned something, that she needed to stop talking and start listening.

Our liaisons have been involved in supporting Open Educational Resources (OER) development and use, bringing the library into research grant proposals. One area of research focus is a particularly high risk community in our downtown, and our librarians have been working to make research accessible to everyone in that community so that they can access that information.

We are reorganizing to define ourselves by what users do rather than by what librarians do—merged two groups of liaisons that had a lot in common and are asking them to reorganize to work as a team.

How are your liaisons dealing with the increasing presence of Interdisciplinary research and teaching on a large university campus?

Our Research Commons service helped with this—staff are teaching about metrics, data management, thesis formatting—all this is discipline agnostic; we started "FIRE talks" with grad students from different disciplines; and now we are struggling with how to layer functional atop liaison roles; there is a real drive in the university for collaboration across disciplines and even across universities and funding agencies drive some of this agenda.

Sometimes subject specializations in liaisons can lead to barriers to interdisciplinary work; in our job postings, we have now moved ‘required’ subject degree to ‘preferred.’ We also have talented people in house who can talk to certain departments better than longstanding subject specialists; also asking what functional layers look like, do we want self-forming among librarians, for example?

We are trying to teach how to embed tools in the research lifecycle, not teaching it just to teach it as a technical exercise, for example, EndNote.

Most of our librarians are involved in teaching the introductory English Comp course, even if their area is outside of the discipline. This was interesting—it was led by the Business Library staff who stepped up to agree to participate, then others followed. Later on, when Business needed help, others were willing to help because the precedent had been set. Interestingly, this more global approach to our work has led to conversations about not falling back on ‘we have a data librarian’ when data questions come up, but cross-training liaisons. These conversations are now easier than in the past.

Emerging technologies force more interdisciplinary organization; the past organizational structure had created barriers, partly because the library had arbitrarily assigned technologies to certain subjects (e.g., “digital humanities”), but now that technology covers a broader disciplinary spectrum, and you need digital services for the whole campus.

It’s all about trying to understand what we’re doing. And if we’re going to make a shift to being a ‘humanities librarian,’ for example, instead of being ‘the English librarian,’ we need to support staff so they can have those conversations; be intentional about ‘what are we doing’ and building towards competencies e.g. everyone has basic set of emerging skills, then after a certain point, you would turn the problem over to experts. It’s a huge project; we want and need data horizontally and vertically. Right now, we can’t generate annual reports on a unit’s activities because individual staff retain the knowledge but do not document it, and there is no tool for managers to look at unit activities in real time. This is a disservice to liaisons—they have no record of their work except for their own narrative, especially if they have tenure there are no requirements to submit such data (at our institution).

We have recently conducted an engagement survey at our library, to be completed by staff, to understand how and with whom they are engaging on campus. This will create a baseline of activities among all public-facing staff so we know what they’re doing now, what skills or core competencies tie into the university’s undergraduate competencies; we will stop asking for old statistics that don’t incentivize liaisons to do the work we want them to do.

One of the questions we are considering is, what are you measuring? Move from transactional to relational—we’ve been good at transactional in our profession, we do responsive things, but now want to track building relationships with faculty, going to campus events, being written into or advising on grants, consulting on the Institutional Repository or Scholarly Communication.

What kinds of activities or follow up have you undertaken following your liaison institute?

We are working on best practices for liaisons—this came out of the workshop, something liaisons wanted to do on their own; it was not mandated by management—to formalize what was done in institute into workflows, performance reviews. We now have to map these to the strategic plan—which should make folks excited to work on new initiatives that are strategic—e.g., how many dissertation defenses have you been to? How many digital objects have you created (instead of counting Gobi slips!); thinking in fresh ways about the things they currently do, questioning them, and making changes.

We sent out a survey about what attendees experience, what they would like to see happen next. Attendees want to keep talking. They want to know what Admin thinks are the future scenarios possible at our library, and where we should focus our energies. They also want to hear more from other libraries about what they are doing, to see if we can learn from each other. We are planning to bring more people to campus, and keep having conversations leading to action steps.

We are planning another event that models the faculty/student/administrator panel, to better understand our user community and to generate ideas.

A group of our librarians are making librarian “superhero” cards to let users know what we do. This idea came directly out of the institute. We need to do better outreach because our roles are now much different from what our users assume.

Undertaking new initiatives in new ways also required diligence of department heads to keep staff from falling back into old practices.

We are also thinking about how to measure things that come out of this—Ithaka S+R reports on research practices in different subject areas are helpful here, also the report “Rethinking Liaison Programs for the Humanities” published this past summer. Understanding these researcher behaviors help us craft the value proposition.

Our institution now has a “super-sized” science library—new librarians bring lots of energy and new ideas. We are seeing a community of practice instead of formal working groups—informal teaming is taking place.

Our institution is also moving toward teaming. We have centralized developers, a project manager team, teams for data, digital services, digital scholarship... the idea is to create one point of entry for users. Even if this is more complicated for libraries, we need to work in teams now.

What advice would you give to colleagues thinking about hosting an ARL liaison institute?

If going through strategic planning in your library, that's a huge opportunity and an ARL liaison institute can help staff feel confident in having these conversations; then you also have a data point, you can get info from stakeholders.

Be provocative—scenarios that are part of institute package should be very provocative, imagine a different future. Resist any urge to be less provocative, get out of your comfort zone; even if the imagined future isn't possible, it gets people to think about other possible futures.

Have a process—know why you're doing it; We liked the snowball exercise—what people are excited about, what they're scared about, and what they want from management—it's like gold that can feed into change management.

Allow enough time for conversations—don't try to squeeze in too much.

We liked meeting with colleagues from other libraries, it was interesting to hear how others are handling changes.

Important to get librarians involved in the conversation about our future—think about replacing things that are no longer needed. Especially important for outside facilitator to facilitate these potentially difficult conversations.

Question from the audience: We are networking as liaison managers, but how can liaisons network cross-institutionally? Could ARL find a way to support a network for actual liaison librarians themselves, not managers and AULs?

A suggestion was made to have another conversation among those who have previously attended an ARL liaison institute as a participant—e.g., a cohort-based group of participants who have gone through this institute to connect to each other. One option is a point person in any library that has had an institute, who could act as a conduit to other libraries.

***Question from the audience*:** Notice that many liaisons are concerned about more and more work, finding it hard to stop doing something, and 'don't have time to learn X'—how to address this?

Response: Our library and others are seeking to rebalance roles, shifting from collections to engagement; leverage technology in collections work to free up time; also improve efficiencies in teaching and learning (e.g. move from one-shot to curriculum mapping/integration).

Important to note that functional specialists often have strong, powerful relationships with faculty, as do some bibliographers, making liaisons feel like third wheel—there are some feelings of competition or turf, so we need to move to a team-based approach, to where an internal referral is genuinely considered a success.

One attendee noted that it will take a special person to help everyone work together in a teamed environment.

Question from the audience: Grappling with assessment of liaison activities—what to measure?

Response: Rita Vine (ARL VPO) is pulling together indicators for success for a toolkit—the indicators could be used for self-assessment and/or by management to integrate with competencies, performance appraisal. The challenge is that from our institute experience, assessment is equated with performance appraisal and people will shut it down; but indicators of engagement can provide suggestions or ideas that individuals can adopt on their own as a first step. Rita is focusing on indicators of engagement, including relational activities; at the same time, managers need to think about new ways of measuring outputs that are relational.

It will be important for outcomes to become more serious than inputs, and we will need to look at outputs in new ways e.g. if burnout with instructional sessions is a red flag, can we replace those with videos that students watch before an in-person class, or even some other way to ensure that learning outcomes are achieved?

Output measures are being established by regional accrediting agencies—if we can find samples to make narratives with, they help add to data we already have for input measures; even if can't assess the entire library's instruction, we can study one subset e.g. how are funds used when not put towards firm orders.

Collecting data is sometimes fraught. But if you can approach assessment and data collection using questions like "What stories do you want to tell? And to what audiences? What are you willing to collect to tell these stories?," this can result in a better understanding of needs, a culture shift.

Question from the audience about tracking interactions: Are libraries looking at customer relationship management tools?

Response: Several libraries mentioned looking at some of these. Rita recommended the article "Making all the right moves for liaison engagement" by John Bales"—he has a very simple spreadsheet for this that staff used to track their interactions. The spreadsheets were collected and compiled. Rita also voiced some concerns about trusting third party tools with our engagement data, and that sometimes a simpler solution is better, at least to start. Staff need to want to track engagement data, which takes time and effort.