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# Dangerous Liaisons: Brainstorming the 21st Century Academic Liaison

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## Abstract

Academic liaison roles have seen massive changes over time and grown into an ever-broadening range of duties. What began as subject-focused collection involvement has evolved into a mix of instruction, reference, and various forms of course-embedded services, all while also retaining the earlier focus on subject-specific collection management. This paper outlines current research on academic liaison roles and summarizes the interactive exchanges from the 2018 Charleston Conference Lively Session on academic liaisons (<https://sched.co/GB2i>). Through live polling and discussion, session participants identified key functions and core competencies for liaisons, as well as factors contributing to success or hindrance for liaison success. Key functions and competencies include outreach, communication, assessment, collaboration and teamwork, collections, subject expertise, and instructional skills. Temperamental success factors include intellectual curiosity, a growth mindset, awareness of campus trends and commitment to partnering, and building relationships. Hindrances identified by session participants include competing duties spanning too many areas of the library organization, high librarian turnover, and lack of boundaries across positions. The most-cited needs include training, support for professional development, clear priorities and expectations, administrative and faculty support, and increased liaison staffing. Participants gleaned several ideas to try at their home institutions: surveying faculty needs, strengthening training for liaisons, offering liaisons support in growth areas, mindfulness of complex demands on liaisons, aiming for manageable expectations, and efficient focus for liaisons' efforts.

## I. Background

### Academic Liaison Roles – A Brief Trajectory

**Beginnings:** Early traditions were rooted in the subject bibliographer whose expertise was focused on library collection development. Whether individually or in collaboration with academic departments, the academic liaison, subject specialist, or subject bibliographer concentrated on selection and handoff of the purchase to the library's acquisitions functions.

**Task creep:** The growth in the breadth and range of library services has greatly widened the range of academic liaisons' duties. In addition to collection management informed by subject knowledge, the academic liaison's close collaboration with academic departments now includes subject-focused information literacy, course-

embedded research support, one-on-one research consultations, production of online research guides, advising faculty and students on quality publications and copyrights, research data support and services, digital scholarship, open educational resources, assessment, analytics and decision support, and more. Academic liaisons thereby feel the pull of subject expertise as well as functional expertise. On one hand, liaisons' outreach and strategic collaborations enhance libraries' stature in the scholarly enterprise. On the other hand, these ever-broadening duties have also led to blurred lines: Overlapping duties and turf questions in the mold of "which tasks are managed by whom in what context?" are just a few of many workflow fluctuations and administrative ambiguities facing liaison programs.

## **II. Aiming for Practical Solutions**

### **ARL ASERL Liaison Institute of April 2018**

In light of the above developments facing liaisons (Bakkalbasi et al, 2016; Banfield & Petropoulos, 2017; Crawford, 2012; Hayman, 2017; Henry, 2012; Logue, 2007; Kenney, 2015, 2014; Miller, 2014; Sievers-Hill, 2014; Vine, 2018), the Association of Research Libraries (ARL) has undertaken several research studies and liaison institutes to develop helpful guideposts for revamping liaison programs. The Association of Southeastern Research Libraries (ASERL) held an ARL ASERL Liaison Institute in April 2018 to engage attendees from ARL and ASERL members in interactive exercises to discuss current issues and identify potential solutions.

#### **Part 1 – Keynote:**

In her **keynote address**, ARL's Interim Director Anne Kenney (2015, 2014) presented her research on key megatrends affecting the roles of libraries' liaisons: Universities face growing financial constraints and expanding digital ecosystem, paired with changes in the nature of research, teaching, and learning. Universities as global entities are manifest in form growing international campuses and student experiences such as study abroad programs and international students. Global research is contributing to the collaborative imperative: Universities' shift from standalone entities toward functioning more as points of connectivity in a worldwide network has led to greater interdependence and research operating on a global scale.

**Implications for the 21<sup>st</sup>-century information professional:** Some members of the academy view libraries as antiquated. Libraries have the challenge of raising constituencies' expectations of how delivery of expertise, services, and resources makes a strategic difference in academic success. **Inadequacies in the current liaison approach** include program stasis, turf issues, an "inside-out view" from the perspective of what works for the library as opposed to consideration of evolving university and user needs, and communication challenges of information lost along the way of the communication chain.

**Recommendations** center on deeper engagements across campus. Examples for relationship-building **partnering across campus** include outreach to institutional research / planning, sponsored programs, campus research office, patents & inventions, centers of teaching excellence, and similar areas with cross-campus reach. **Developing intervention strategies** is informed by knowing the campus. Knowing *when* to do something is as important as knowing *what* to do. Appropriate timing, i.e. a sense of “the right approach” at the “right time” stems both from familiarity *and* regular collaboration. **Identifying pain points and needs** can entail a variety of context-sensitive campus needs that the library is well-suited to meet. A few examples include outreach to at-risk students, tapping into the university’s student success goals, and engaging international students. It is also important to realize that “**no one liaison can do it all**”: The diversifying and broadening mix of needs touching liaisons’ work illustrate the tensions between the need for subject expertise *and* functional expertise. Subject and functional expertise are distinct yet interdependent. Workloads could even out through a team approach rather than individuals single-handed trying to meet all realms of need. To **move away from “one-offs”**, Kenney’s keynote advised liaisons to concentrate efforts toward impacts at the departmental or discipline-wide level, using online tools and templates to help scale up and expand reach, and to mine data to target specific faculty information such as their research areas and where they publish. She also cautioned that there exists no “one size fits all” approach and stressed the importance of meeting faculty and students where they are. Liaison efforts should **move away from “inputs”** such as number of sessions taught, number of books ordered, number of contacts made and instead aim for qualitative approaches that are sensitive to the context at hand. To **develop criteria for capturing “outputs”**, more meaningful measurement of liaisons impact is achieved by quantifying goals and tracking progress. To align liaisons’ actions with academic success measures, Kenney’s keynote advised mapping liaisons to departments, defining goals and then aligning activities with goals, and defining success: Should success tie to ORCID registrations, learning goals, faculty and NIH public compliance mandates, or research support requests? **Focus on university indicators** is one recipe for increasing demand for the library as a strategic partner in research and scholarly productivity and impact measures.

## **Part 2 – Common Themes from Small Group Discussions:**

Small group discussions on what to **reduce, de-emphasize, or stop doing** reflected the **common themes of time-consuming, low-return** activities such as inputs including number of orders placed and classes taught, as well as antiquated procedures and task mechanics such as counting transactions or other statistics that do not necessarily reflect meaningful engagement with campus needs. Tasks **do more of or start doing** suggested by small-group participants reflected the **common themes of strategy, impact, feasibility, and sustainability**. Tangible suggestions included emphasizing the intellectual enterprise and aligning activities to learning outcomes,

forging partnerships and intellectual collaborations to build sustained relationships, actively going to users and meeting them where they are (formally and informally), sustainable support through online tools, as well as marketing and outreach. **Self-assessment for liaisons:** (1) small group discussions yielded suggestions for liaisons to keep customer profiles on faculty research, interests, and coursework, (2) to gather meaningful outcomes data with qualitative rigor, (3) surveys, and head off campus library-survey fatigue by partnering with departmental colleagues for survey distributions, as well as (4) informal conversations with faculty. Suggested types of **administrative support for liaisons** included (1) open communications about job functions' relevance to changing times, (2) inviting liaisons to write out their jobs in five years and then help them get there, (3) celebrating small victories, especially in early-stage new types of campus-library links, (4) heading off turfism by valuing contributions and encouraging collaboration and mutual respect, and (5) shunning vague job descriptions with excessively fluid duties. **Common themes** for the **Do's** of liaison practices centered on **clarity and positive support**, while the **Don'ts** centered on **equivocation, inconsistency, and bad data**.

### III. Charleston Conference Session: Interactive Live Poll Results

During the allotted time of 75 minutes, this Lively Session incorporated liaison-job-description-analysis exercises and broader-issues reflection exercises using the cellphone-friendly Mentimeter live poll software. Owing to time constraints, no roll or attendance count was taken of the session participants. A total of eleven questions were asked via live poll, with anonymous responses displaying on the screen in real time: **Questions 1 to 3** covered **basics** such as session participants' organizations types, roles, and whether or not their home institutions have liaison programs. **Questions 4 and 5** related to the **job-description-analysis exercises** and asked participants to note strengths and weaknesses of their randomly assigned job ads. **Questions 6 to 10** pertained to **reflection exercises** asking session participants' thoughts on their own liaison programs' strengths, pain points, support needs, and administrative strategies for supporting liaisons. **Question 11** closed the live poll by asking participants what **key takeaways** from the session they would try at their home institutions.

The open-ended answers were captured with word clouds and open-ended quote boxes. The session's brisk pace limited the amount of time for respondents to type the answers on their phones. This resulted in a small number of minor typographical errors. The images of the word clouds and open-ended quotes below show the responses verbatim in the order entered. In the raw data tables, the entries are listed alphabetically for clarity, and the originally mistyped words were corrected.

#### **Part 1 -- Basics:**

The session began by gathering basic information about the participants to gauge the perspectives from which they saw liaison roles:

**Question 1: What type of organization are you with?** Most were at 2-4-year college libraries, followed by corporate libraries.

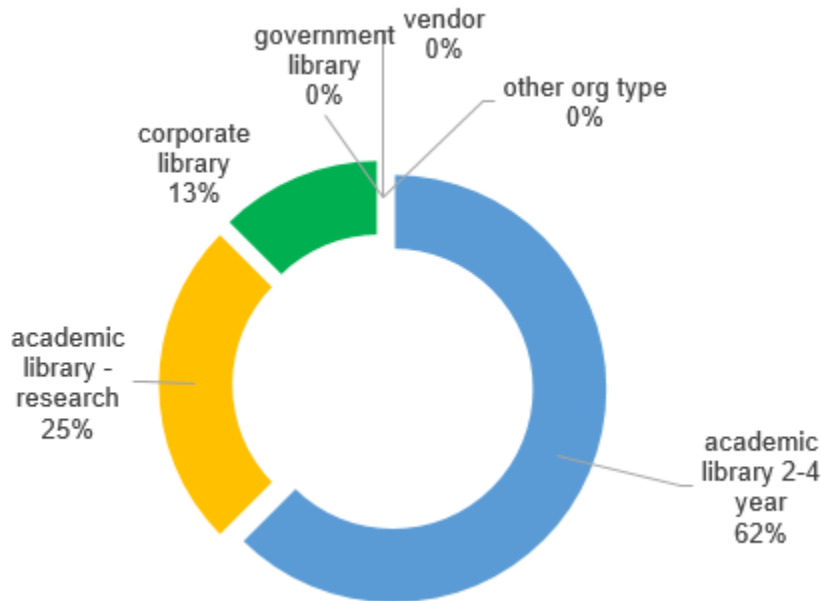
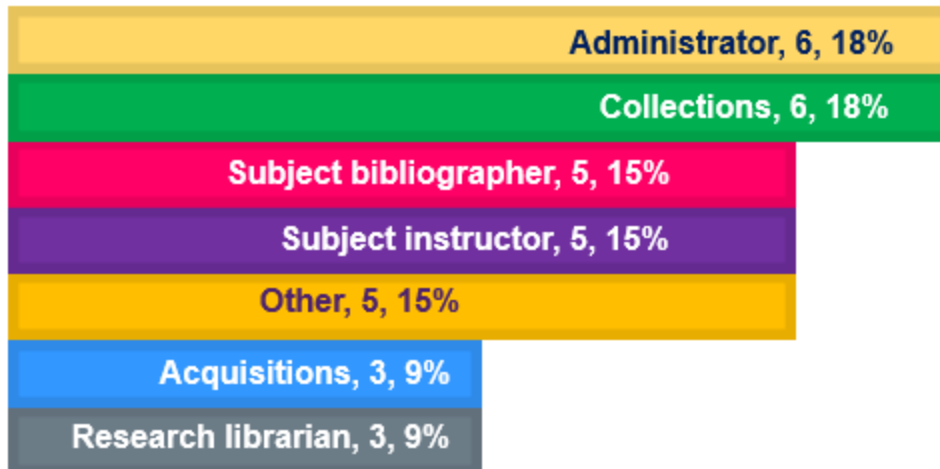


Figure 1: Live Poll Question 1: What type of organization are you with?

<u>Choices</u>	<u>Votes</u>
academic library 2-4 year	5
academic library - research	2
corporate library	1
government library	0
vendor	0
other org type	0
<b>Total responses</b>	<b>8</b>

**Question 2: What is your role?** Administrator and collections tied for the most-represented roles, followed by subject bibliographers, subject instructor, and “other” (tie), and acquisitions librarian and research librarian (tie). 14 respondents articulated 33 roles, indicating respondents’ multiple roles.



**Data librarian, 0, 0%**

**Vendor, 0, 0%**

Figure 2: Live Poll Question 2: What is your role?

<b>Choices</b>	<b>Votes</b>
Acquisitions	3
Administrator	6
Collections	6
Subject bibliographer	5
Subject instructor	5
Data librarian	0
Research librarian	3
Vendor	0
Other	5
<b>Total responses</b>	<b>33</b>
<b>Respondents</b>	<b>14</b>

**Question 3: Does your organization have a liaison program?** All participants responded in the affirmative.



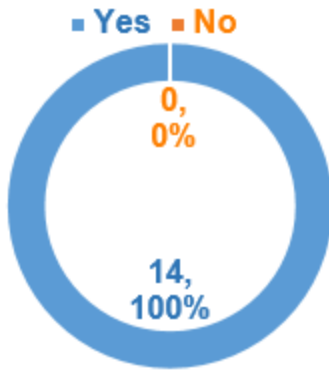


Figure 3: Live Poll Question 3: Does your organization have a liaison program?

Choices	Votes
Yes	14
No	0
Total responses	14

**Part 2 -- Job description exercise:**

Next, each session participant was given one of twelve current job ads for positions with liaison duties for the job-description-analysis exercises. Eleven of the positions were at varying sizes of universities; one was a corporate medical research librarian position with liaison duties. The position advertisements were randomly distributed among the Charleston Conference session participants. The session participants examined these current job postings for descriptions of liaison roles. Guided by interactive live polls, the participants identified key liaison functions missing from the descriptions. Next, the participants noted superfluous functions which pose distractions from liaison roles.

**Question 4: What important functions are missing?** Outreach factored most strongly, followed by assessment support.



Figure 4: Live Poll Question 4: What important functions are missing?

**24 responses from 10 respondents:**

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1. assessment
2. Assessment
3. Assessment
4. Collaboration
5. Collection
6. Collections
7. Community\_engagement
8. Data\_management
9. Evolving
10. global\_engagement
11. Library\_instruction
12. Open\_education\_resources
13. outreach
14. outreach
15. outreach
16. outreach
17. Outreach Communication
18. Scholarly\_communication
19. Scholarly\_communications
20. Strategic
21. Systematic\_reviews
22. Technology\_team\_lead
23. time\_as\_liaison\_and\_tech
24. the\_word\_liaison

**Question 5: What stated functions are superfluous / distractions?** The responses reflected the session participants' concerns with the job ads' grab bags of duties with the inevitable results of excessive fragmentation and overload of the liaisons' time.



Figure 5: Live Poll Question 5: What stated functions are superfluous / distractions?

**10 responses from 10 respondents:**

1. Assistance with library technology; development and assessment of policies and procedures
2. Collection development policies
3. "coordinate with database vendors"
4. De-selection of materials
5. General reference desk
6. It's unclear if this job description has any subject/department liaison responsibility. Could be inferred, but it's not clear.
7. Selection, collections
8. Supporting technology for the whole library.
9. There is too much here. What percentage of time on liaison vs technology
10. Too much specialization. Liaison will end up with heavy instruction load that skews job role for certain time of semester or quarter.

**Part 3 -- Reflection:**

Guided by interactive live polls, the session's participants reflected upon core competencies for liaisons, aspects that work well in their home institutions' liaison programs, their liaison institutions' pain points, types of support needed for their liaison roles, and ways in which administrators can help library liaisons.

**Question 6: What are core competencies for liaisons?** Outreach and communication were cited the most by the session participants, followed by collections, selection, instruction, and the traits of curiosity and subject expertise. Less common responses recurring themes of mindsets such as intellectual curiosity,

collaboration, ability to connect and cultivate relationships, as well as knowledge of the discipline and the library resources.



Figure 6: Live Poll Question 6: What are core competencies for liaisons?

**64 responses from 15 respondents:**

1. Ability\_to\_collaborate
2. Advise
3. Assessment
4. Attending\_dept\_meetings
5. Awareness\_of\_campus
6. Basic\_project\_management
7. Building\_relationships
8. Collaborate
9. Collaboration
10. Collaboration\_as\_a\_partner
11. Collaborative
12. Collections
13. collections
14. communication
15. Communication
16. Communication
17. Communication
18. communications
19. Cultivate
20. curiosity

21. curiosity
22. Develop
23. discipline\_knowledge
24. Educate
25. Embedded\_work
26. engagement
27. Faculty\_collaboration
28. Flexibility
29. growth\_mindset
30. Inform
31. instruction
32. Intellectual\_curiosity
33. knowledge\_of\_subject\_discipline
34. Knowledgeable\_of\_resource
35. Library\_instruction
36. Making\_connections
37. meet\_organizational\_goals
38. Opportunistic
39. Outreach
40. Outreach
41. outreach
42. Outreach
43. Outreach
44. Outreach\_and\_engagement
45. People\_person
46. Persistence
47. Play\_well\_with\_others
48. proactive\_engagement
49. Problem\_solving
50. reference
51. Research\_consultations
52. Research\_enterprise
53. Research\_skills
54. Selection
55. Selection Instruction
56. Service\_focused
57. Subject\_Expertise
58. Subject\_expertise
59. Teaching
60. Teaching\_and\_instruction
61. teaching\_their\_classes
62. Team\_Building
63. Teamwork
64. True\_Subject\_expertise

**Question 7: What works well in your liaison program?** Participants cited strong points including administrative support, autonomy for liaisons, collaborative work, and mutual respect.



Figure 7: Live Poll Question 7: What works well in your liaison program?

**13 responses from 13 respondents:**

1. Administration support
2. attending departmental meetings.
3. Autonomy for liaisons
4. Connecting with department admin assistants to open (figurative) doors.
5. Faculty respect librarians as teaching/information professionals
6. instruction - increasing; working with faculty,
7. internal structure for liaison training and communication
8. Mutual respect
9. (New) team structure works to people's strengths and allows us to meet emerging needs of users
10. Relationships with professors
11. Subject and functional teams working together for training, communication, projects
12. Subject expertise combined with functional expertise
13. Willingness to explore/build a new liaison program that meets needs of various stakeholders. We are in early stages... new job descriptions, etc

**Question 8: What are pain points in your liaison program?** The biggest challenge is high workloads resulting from campus growth, rapid changes crowding out sight of core needs and values, large workloads and competing priorities, and lack of boundaries, followed by lack of knowledge and lack of mentoring.

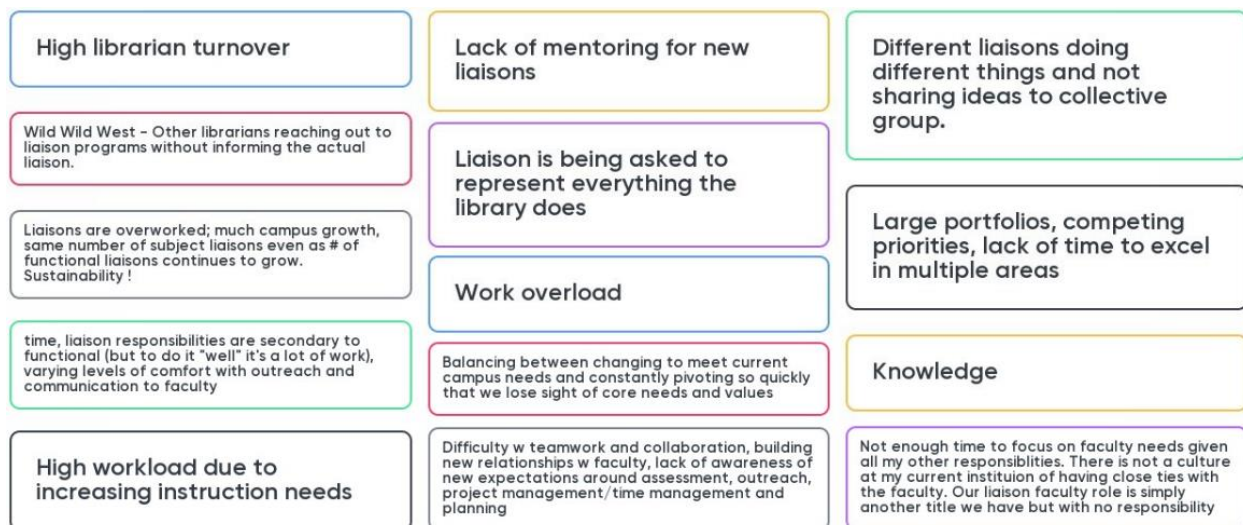


Figure 8: Live Poll Question 8: What are pain points in your liaison program?

**14 responses from 14 respondents:**

1. Balancing between changing to meet current campus needs and constantly pivoting so quickly that we lose sight of core needs and values
2. Different liaisons doing different things and not sharing ideas to collective group.
3. Difficulty w teamwork and collaboration, building new relationships w faculty, lack of awareness of new expectations around assessment, outreach, project management/time management and planning
4. High librarian turnover
5. High workload due to increasing instruction needs
6. Knowledge
7. Lack of mentoring for new liaisons
8. Large portfolios, competing priorities, lack of time to excel in multiple areas
9. Liaison is being asked to represent everything the library does
10. Liaisons are overworked; much campus growth, same number of subject liaisons even as # of functional liaisons continues to grow. Sustainability!
11. Not enough time to focus on faculty needs given all my other responsibilities. There is not a culture at my current instituion of having close ties with the faculty. Our liaison faculty role is simply another title we have but with no responsibility
12. time, liaison responsibilities are secondary to functional (but to do it "well" it's a lot of work), varying levels of comfort with outreach and communication to faculty
13. Wild Wild West - Other librarians reaching out to liaison programs without informing the actual liaison.
14. Work overload

**Question 9: What support do you need for your liaison role?** Training was cited the most, followed closely by enough time for the role and for professional development.

Further needs include clear priorities, structure, less fragmentation from too many disparate duties, and more liaisons to help carry the workload.



Figure 9: Live Poll Question 9: What support do you need for your liaison role?

**24 responses from 13 respondents:**

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1. Admin\_support
2. Clear\_priorities
3. Collaboration
4. colleague\_support
5. communication\_templates
6. desire\_from\_faculty
7. Faculty\_support
8. Less\_time\_on\_ref\_desk
9. More\_ICT\_support
10. more\_liaisons
11. More\_liaisons\_to\_share\_work
12. New\_approach
13. New\_teaching\_pedagogy
14. Prioritization
15. separate\_outreach\_role
16. Structure
17. time
18. time\_for\_professional\_dev
19. Time\_for\_role
20. Training
21. Training
22. Training
23. Training\_for\_new\_areas



## 24. Training\_in\_new\_functions

**Question 10:**      **How can administrators help liaisons?** Placing high priority on hiring more liaisons and proving support for training and knowledge development factored strongly. Session participants would also like administrators to reward the work liaisons do under very fluid circumstances, recognize the growing range and amount of responsibilities, help liaisons navigate changes, encourage strengths, and help balance workloads.

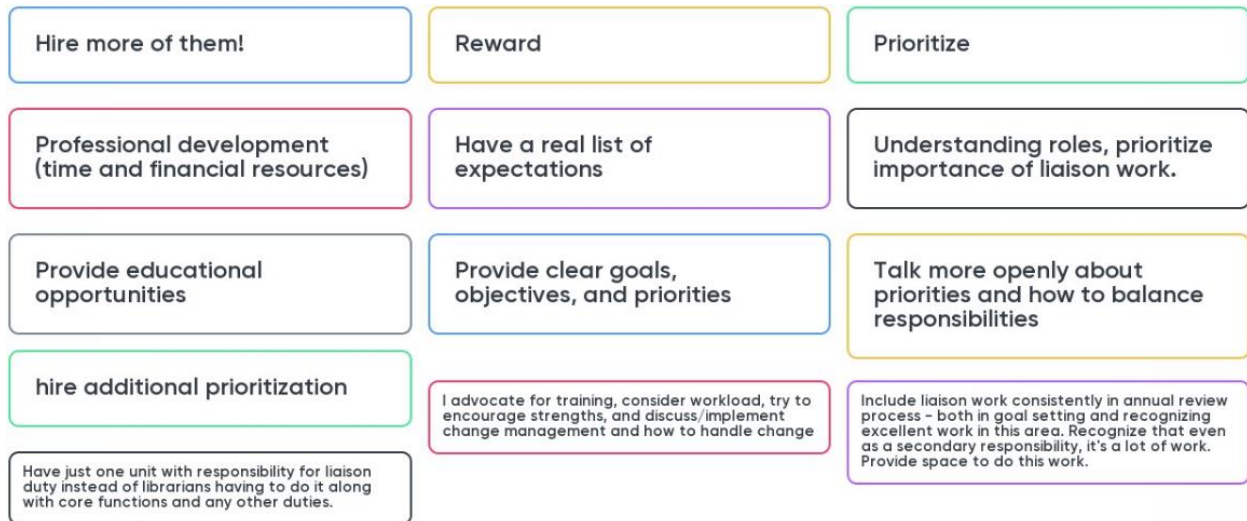


Figure 10: Live Poll Question 10: How can administrators help liaisons?

### 13 responses from 13 respondents:

1. Have just one unit with responsibility for liaison duty instead of librarians having to do it along with core functions and any other duties.
2. Have a real list of expectations.
3. hire additional prioritization.
4. Hire more of them!
5. I advocate for training, consider workload, try to encourage strengths, and discuss/implement change management and how to handle change.
6. Include liaison work consistently in annual review process - both in goal setting and recognizing excellent work in this area. Recognize that even as a secondary responsibility, it's a lot of work. Provide space to do this work.
7. Prioritize.
8. Professional development (time and financial resources).
9. Provide clear goals, objectives, and priorities.
10. Provide educational opportunities.
11. Reward.
12. Talk more openly about priorities and how to balance responsibilities.
13. Understanding roles, prioritize importance of liaison work.

## Part 4 -- Closing thoughts:

In closing, the participants reflected upon key takeaways and ideas from this session that they will try in their home institutions.

**Question 11:** What key takeaways and ideas from this session will you try in your home institutions? Key takeaways center on structures to improve workflows and balance workloads, celebrating liaisons' work and wins achieved, and being mindful of the fundamental shifts impacting liaisons. One participant intends to share the findings from this session in support of revamping the home library's liaison program.

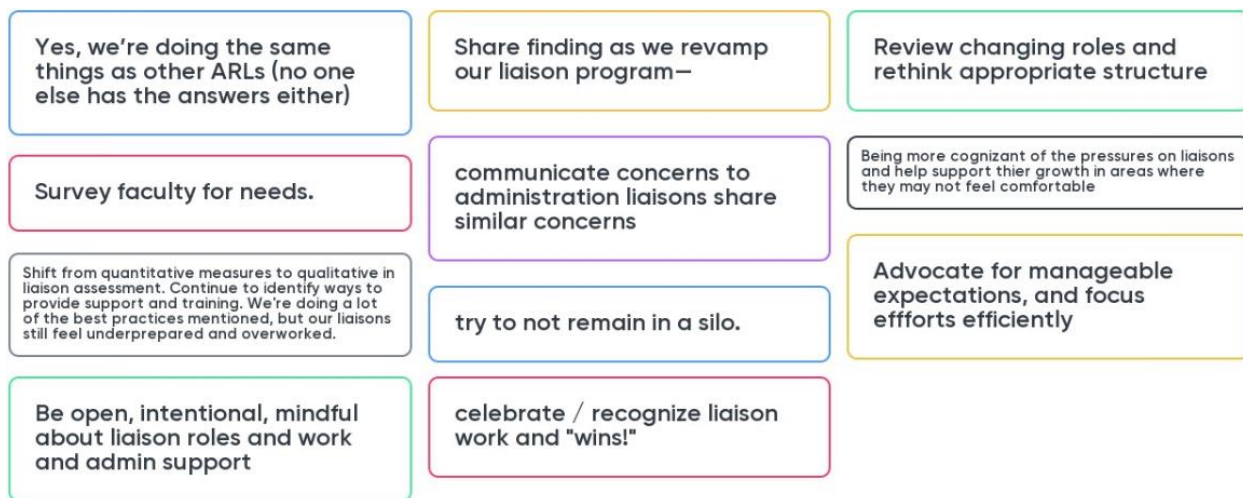


Figure 11: Live Poll Question 11: What key takeaways and ideas from this session will you try in your home institutions?

### 11 responses from 10 respondents:

1. Advocate for manageable expectations, and focus efforts efficiently.
2. Be open, intentional, mindful about liaison roles and work and admin support.
3. Being more cognizant of the pressures on liaisons and help support their growth in areas where they may not feel comfortable.
4. Celebrate / recognize liaison work and "wins!"
5. Communicate concerns to administration; liaisons share similar concerns.
6. Review changing roles and rethink appropriate structure.
7. Share finding as we revamp our liaison program—
8. Shift from quantitative measures to qualitative in liaison assessment. Continue to identify ways to provide support and training. We're doing a lot of the best practices mentioned, but our liaisons still feel underprepared and overworked.
9. Survey faculty for needs.
10. Try to not remain in a silo.
11. Yes, we're doing the same things as other ARLs (no one else has the answers either).

## IV. Conclusions

Although similar observations prevail throughout the library profession and no one has definitive answers, recurring themes center on the need for clear expectations and priorities, support for liaisons, training and mentoring, time and funding for professional development, as well as recognition of liaisons' steady absorption of more volume and categories of work.

Both prior research and the responses from this interactive 2018 Charleston Conference session point to large workloads growing both in size and complexity, resulting in a sense of the entire suite of library services from encroaching on liaisons' duties. This complexity of library-department relations reveals the need for organizational structures: The pain points and support needs call for boundaries between duties. Logical lines of demarcation should be drawn between positions and between functional and subject expertise in order to balance workloads.

Organizational structures conducive to balanced workloads, clearly articulated and manageable expectations, administrative support including positive acknowledgement for bridge-building gains achieved by liaisons, as well as mentoring and systematic training for liaisons are urgently needed to ensure the sustainability of the collaborative progress which libraries have made through the innovative outreach services of liaisons.

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