

# **The meaningful measurement of liaison librarian services in an uncertain world**

Jennifer Thomas and Joanna Logan  
Queensland University of Technology Library, Australia

## **INTRODUCTION**

The Queensland University of Technology (QUT) located in Brisbane on the east coast of Australia is a metropolitan university that has two main campuses of about equal size at its locations at Kelvin Grove and Gardens Point. QUT has approximately 53,000 students, approximately 4,600 staff and five faculties: Business & Law; Creative Industries, Education and Social Justice; Engineering; Health; and Science (Queensland University of Technology, 2022b).

QUT Library itself has three branch libraries: Kelvin Grove Library; Gardens Point Library; and the Law Library, also based at Gardens Point campus. It has just over 90 staff, 22 of which are Liaison Librarians (faculty librarians). The Library has also adopted a service management approach to ensure continuous improvement of its services.

In 2022, a group of staff at QUT Library formed a working group, including us as authors, to more accurately measure the value and impact of its liaison service. This service consists of teams of liaison librarians (faculty librarians) who liaise with the university's faculties and divisions in matters of teaching and learning support, research support and information resource management (QUT, 2022a). It is a varied role with high levels of autonomy and many opportunities for skills development which is a key attraction for many liaison librarians. This paper discusses how this working group, based on a strategic imperative to report on liaison initiatives and engagement more meaningfully, addressed the problem and redefined liaison data collection in an effort to future-proof and elevate the value of liaison work into the future.

## **DEFINING THE PROBLEM**

Over the last few years, the uncertain state of the world has meant that it has become increasingly important to demonstrate the value of all the services we deliver at QUT Library. Organisationally, the impacts of COVID were affecting staffing budgets, there was a rapid move to online delivery testing the digital dexterity of staff, and faculty and organisational restructures were also affecting the library and how we support faculties.

Furthermore, an enduring issue, exacerbated by the variety and autonomy of the liaison role, has been the inaccurate measurement of this service. Measuring liaison services has historically been very difficult due to reporting requirements that have changed

over the years and the reality that we were using a legacy system for tracking work that was no longer fit for purpose. There was also great variation in how individual librarians entered data into the system resulting in further issues with data integrity.

Thus, it had become strategically and operationally important to measure the liaison service more meaningfully and the library had to rethink the way it measured the value and impact of the service. This was also documented in the service vision for the liaison service (every library service has a corresponding service vision to help guide the service) as a key opportunity—*data about the service will be more readily available to liaison librarians, service managers and stakeholders ... to help inform service delivery and service improvements*—with evidence of success being *engagement with Library services (number of individual consultations and workshops delivered) and individual feedback* (Queensland University of Technology Library, 2022).

## **THE PROCESS**

In order to address the problem, a working group was established to identify and carry out critical tasks including stakeholder engagement, an informal environmental scan, determining the list of requirements, selecting and trialling the tools and technologies on offer, developing guidelines and conducting testing and feedback on the selected tool. This was an iterative process that took place over approximately eight months from July 2021 to February 2022. It is also important to note that we were not allocated a budget and all extra work generated by the project was absorbed by the working group members around their business-as-usual roles.

### ***Establishing the working group***

The Liaison Service Manager led the work with the support of the Library's Quality and Planning Manager and expressions of interest were sought from liaison librarians interested and engaged in helping to address the problem. Four liaison librarians self-selected for the working group, which we called the Liaison Impact Working Group, and we met regularly to scope the task. A key aspect of this was to clearly define *why* we were doing this work and what a successful end goal would be. Together we decided the goal was *to demonstrate the value and impact of the liaison service in the most meaningful, consistent, and streamlined way possible*.

Thus, it was important to define what we meant by value and impact in the context of liaison work. As Oakleaf (2010) indicates, “service delivery supported by librarian expertise is an important library value” (p.23) and at QUT, liaison librarians have always logged data about their work. However, internal and external requirements for liaison data have changed over the years and logging data had become more of a workload management activity than an activity that could be interrogated to report on the value of liaison activities in any meaningful way. Whilst we knew that the liaison service was valuable and valued, we also knew that the direct measurement of its

impact was challenging, especially in an academic library where value is increasingly linked to service, rather than just products or commodities. While value can be hard to define, it should not be ignored as our institutions, stakeholders and customers are constantly making comparisons and judgements about the value of our services (Urquhart, 2015). Ultimately, we decided that liaison activities that demonstrated *engagement* with the university's faculties, divisions and community partners would be a suitable measure of value in the current environment. Definitions of engagement activities (including consultations, events, and the creation of learning resources) are further described in Appendix A.

Simultaneously, while the working group were defining what we meant by liaison engagement, we were also establishing deadlines, allocating tasks, agreeing upon preferred channels of communication, and discussing our deliverables, reporting requirements and the tools and technologies we would use. As the project progressed, we also kept an open and transparent dialogue with all liaison librarians as we knew intuitively that their input would be critical to the success of the project. Enlisting a self-selected group of liaison librarians to be on the working group as key decision-makers and champions was also paramount in helping to communicate the benefits of the project to their peers.

### ***Stakeholder engagement***

Stakeholder engagement was considered one of the most important aspects of the process and we identified and engaged extensively with our stakeholders. This informed most of our decisions going forward, so we took time and care to get it right and we made sure we were consulting with everyone who had a real or perceived requirement for liaison data. We asked a series of questions to our stakeholders and the responses, which were anonymous, were collated into a master spreadsheet which was the key artefact in helping the working group to make decisions about what data to capture going forward, based on who needed it. Liaison librarians themselves were also considered a key stakeholder group who were asked a tailored series of questions, listed below.

### ***Questions for Liaison Librarians***

- *If it was just up to you, what data would you keep that has meaning to you?*
- *What data helps/would help you to tell stories to the Library Executive at the annual liaison team presentations?*
- *What data helps/would help you to demonstrate to your Schools/Faculties how you/your team contributes to their success?*
- *What data do you find yourself telling other people time and time again when trying to paint a picture of what you do?*
- *What types of data have you been asked for that you can't easily produce with the current tools/methods?*

- *Do you use an alternative system for recording data than the Events and Consultations database? If yes, why and what for?*
- *Are there any additional comments you'd like to share about liaison data, processes, tools, reporting etc?*

### ***Questions for other stakeholders***

- *What information do you want to regularly know about the Library Liaison service?*
- *How frequently do you want to know/receive the information?*
- *What do you/or could you use that information for?*
- *Are there others to whom you also have responsibility to report Library matters? Who and how often?*
- *How do you prefer that information to be delivered?*
- *What is your preferred format?*
- *What data do you have that you think would be useful for Liaison Librarians to know?*

As evidenced with the final question, we also took the opportunity to investigate any potential for two-way information sharing, and if there was any data our stakeholders in turn wanted liaison librarians to know.

### ***Environmental scan***

The question of how to meaningfully measure liaison services in an uncertain world is not a question unique to QUT. Many QUT Library staff members are engaged externally with the library profession through groups such as the *Queensland University Libraries Office of Cooperation* (QULOC) (Queensland University Libraries Office of Cooperation, 2022), the Council of Australian University Librarians (CAUL) (Council of Australian University Librarians, 2022) and the *Deputies and Associate Librarians in Australia and New Zealand* (DALIANZ) email list. Through engagement with these groups, which during COVID was mainly via established email discussion lists, we were able to conduct an informal environmental scan to help inform the work we were undertaking. We knew that our library colleagues at other universities were asking similar questions about liaison services and consequently, we collected information from these existing email list discussions, and in turn posed some questions of our own to gather intelligence that might help to inform our own work in the space.

For example, an email discussion initiated by colleagues at another Australian university library, posed questions about a CRM-like (Customer Relationship Management) approach to academic liaison, but which also included questions similar to what we asked our own stakeholders a few months later, including:

- *What [liaison] data do you collect & how do you collect the data?*
- *How do you use the data to demonstrate impact?*
- *Who are your audiences?*
- *[Do you have] Any other insights related to data collection and reporting?*

QUT's Deputy Librarian had gathered these responses and forwarded them to the Liaison Service Manager at the time so the data was available and very useful in helping inform the work of the working group. Another source of feedback, from academic libraries in Australia and New Zealand, was through the CAUL Value and Impact Community of Practice (CAUL, 2021). Through engagement with the Community of Practice, we were able to gain a spot on the agenda to ask some relevant questions about liaison services. Following on from that meeting, we were able to schedule a second meeting to conduct a deeper dive into the work other academic libraries were conducting in this space.

### ***Determining list of requirements***

As our work progressed and we decided on definitions and terminology for capturing engagement, it became apparent that we would need to develop clear guidelines for data collection. Guidelines for data collection were drafted and sent to the liaison librarians for feedback, to ensure that the definitions and terminology used were clear and unambiguous. Feedback on the guidelines were collected in an online padlet and discussed with the working group. Revisions were then made. Feedback was also obtained from the Library's Office for Scholarly Communication (OSC), to ensure that proper terminology was being used to collect data on the OSC services that were being delivered by the liaison librarians. The OSC is a department of QUT Library that provides advice, infrastructure, and tools to make researchers' findings accessible to the world. Liaison librarians assist research staff and students with services that are managed by the OSC. The finalised guidelines are designed to cover the breadth of liaison engagement across teaching, learning and research. The full guidelines are included as Appendix A.

### ***Tools and technology, testing, feedback***

Another major task was to decide which tools we'd like to use to record this engagement. We looked at the existing tools being used for recording liaison work, which included but was not limited to SharePoint lists, individual Outlook calendars, Word documents, and spreadsheets. We also discussed what the impact would be if we were to remove the existing tools.

The tool we decided upon was the Microsoft Office 365 suite of tools—including Microsoft Forms, where liaison librarians would record interactions with faculty that were considered engagement activities. Liaison librarians have always recorded data in

this way, but as previously indicated, it had become more of a workload management tool rather than a tool that measured the service in any meaningful way.

Given our non-existent budget, we decided to repurpose an existing and known tool, a SharePoint list, however we started from scratch and didn't attempt to incorporate aspects of the previous tool which was known as the *Events and Consultations Database*. We created a Microsoft Form to capture the data, used SharePoint lists to display views of the data, and an automated Flow to automate the data capture process. A draft report and dashboard was also created in Power BI to provide more sophisticated visualisation options. The SharePoint landing page for the liaison engagement data was also created and underwent a series of iterations in response to feedback, in order to make more visually appealing and streamline access to the data by both managers and liaison librarians. The newly minted *Liaison Engagement Database* was born.

The use of existing technology saved time and money. With the onset of Covid-19 and rapid transition to online, staff were familiar with O365 tools, and no additional training was required. What did require extensive time, however, was the need for consultation with the liaison librarians and the iterative design of the Form and List, in order to ensure the validity of the data.

## **FINDINGS**

Using existing technology to create and host the Liaison Engagement database has had significant benefits. One key benefit is the lack of need for training in the technology, as O365 was already in use and staff had rapidly increased their digital skills since the start of the pandemic. Another key benefit was that there were no initial setup or ongoing maintenance fees, which was important as no additional funding had been allocated. The flexibility to modify Microsoft Forms and SharePoint in response to liaison and management feedback has also been valuable.

It has also proven essential that the Liaison Engagement site and resources have managerial oversight as some updates have been required post launch. For example, it has been necessary to make some changes to the guidelines (see Appendix A) in response to feedback from liaison librarians as the main users of the guidelines. Changes are communicated to the liaison Librarians, usually via the Liaison Service Manager who takes on this managerial oversight of the new tool.

The project required a lengthy consultation process with liaison librarians and relevant service managers to finalise the categories for the collection of data and the guidelines for data entry. However, this was considered time well spent given the diversity and complexity of liaison work and past difficulties in capturing data and while there is continued variation in the data entered by liaison librarians, this is not unexpected. The working group knew that deciding to make some data collection fields mandatory and

some optional would result in variation in the data collected. That decision had been made in order to reduce the time taken to fill out the form and to provide liaison librarians with some flexibility. In the future there will be the opportunity to review whether there should be any changes to the fields that are currently designated as optional.

Fostering a culture of ownership of liaison data by liaison librarians has been one of the aims of the Liaison Engagement Database. Some of the strategies employed to achieve this include using the liaison librarians on the working group as unofficial champions both during and after the project; engaging with liaison librarians at key milestones in the project; including the Liaison Service Manager on the working group and receiving indirect feedback via the Liaison Service Manager from regular liaison librarian forums. Feedback from the liaison librarians has been used to update the database guidelines through removing ambiguities, filling gaps, and ensuring a common language is being shared. Cultural change takes time, and to be successful requires uptake which is an ongoing priority.

The launch of the Liaison Engagement Database has also generated renewed interest in liaison data from other service areas of QUT Library including the OSC. The OSC has expressed interest in the data with a particular focus on identifying pain points for research staff and students. The creation of views by topic on the SharePoint landing page has surfaced this data which might otherwise have remained undetected, and also reduced the amount of email traffic required to collect data for individual services.

## **NEXT STEPS**

The data in the Liaison Engagement Database will be reviewed in early 2023 to help identify anomalies and any potential issues with data entry and reporting. While a lighter review was conducted in mid-2022, a review in early 2023 will represent almost a full year's worth of data. Given that the stakeholder engagement process highlighted variations amongst liaison librarians in the perceived need to collect and report data, there may still be some variations in reporting. One ongoing challenge is the need to ensure that new staff/staff new to the role are aware of the guidelines and entering data consistently. The Liaison Service Manager and Quality and Planning Manager will discuss any potential amendments to the guidelines and any other steps needed to improve the quality of the data. As always, this will include consultation with liaison librarians and will ideally be finalised before the start of Semester 1 (late February 2023), in time for the start of the new academic year. The review and analysis of data in the Liaison Engagement Database will inform the 2023 Liaison Service Vision, will help identify opportunities and planned service improvements and will be included as one of the measures of evidence of success.

Analysis of data by academic semester should reveal patterns of engagement activity and peak times. The data at the unit (subject), course and topic level will be

particularly useful for liaison teams and QUT Library management and can be communicated to faculty senior management. This granularity of information will be helpful when analysing library enquiry service data and will help inform planning for enquiry services in 2023. Library enquiry services include online chat, email, phone, and face to face enquiries and appointments. These services are delivered by Library Advisers—qualified librarians who support liaison teams but have more of an undergraduate student-facing role. In the past, liaison and enquiry service data have been analysed in isolation, however there are now opportunities to contextualise the analysis. One example includes gathering data relating to specific units that indicate levels of engagement with students by both the liaison and the enquiry services.

There are also opportunities to work with other student support areas within the university, including with the Student Support Group (SSG). SSG aims to support learning and career development for QUT students. An initial meeting with SSG has been held, and there are opportunities in 2023 to collaborate and share data, for example by providing unit and course level library engagement data to include in SSG semester reports to faculties.

Analysis of the research-related support data will be undertaken in consultation with the OSC service managers, to identify patterns of engagement with researchers and research students by faculty. This information could help inform 2023 research service planning.

A draft report and dashboard has been created in Power BI and this will be further developed. The dashboard view will be able to be viewed by library staff and the visuals can be exported and shared with faculty management and other interested parties. The interactivity of the dashboard will enable liaison librarians to easily identify and export visualisations of their engagement with faculty staff and students. They can then use those visuals to help tell their stories to senior faculty management and course coordinators about the value and impact of the library liaison service. We also need to demonstrate our ability to support faculty in achieving their institutional goals and liaison stories can also include a “hook,” such as identifying a unit with extensive liaison engagement or alternately lack of engagement, or an online resource created by a liaison librarian that is fairly new and hasn’t had much traffic. Ideally, communication with academics, where required, should include a ‘call to action’ (Yamaguchi, 2018).

## **CONCLUSION**

Overall, as the Liaison Engagement Database nears its first birthday, undertaking its development has proven extremely worthwhile. Having an engaged and accountable working group to help agree upon and provide clear definitions, develop guidelines and act as champions for a more consistent and streamlined approach to capturing and measuring liaison data has been invaluable. A culture of data ownership is emerging at

QUT Library, along with a shared understanding of the power of data in telling powerful stories and revealing insights that may have otherwise remained hidden. The importance of liaison data is also being elevated in the eyes of those who may have disregarded it in the past, and opportunities are emerging to partner with stakeholders external to the library in joining up data to provide more nuanced and targeted interventions to liaison clients. Exciting opportunities also exist in the visualisation space, and we look forward to seizing these opportunities to continuously improve the liaison service into the future.

—Copyright 2023 Jennifer Thomas and Joanna Logan

## **BIBLIOGRAPHY**

CAUL/CONZUL Library Value and Impact Community of Practice. (2021).

*CAUL/CONZUL Library Value and Impact Community of Practice – Report for the period 2017–2020.*

[https://www.caul.edu.au/sites/default/files/documents/library\\_value\\_impact\\_cop\\_report\\_feb\\_2021.pdf](https://www.caul.edu.au/sites/default/files/documents/library_value_impact_cop_report_feb_2021.pdf).

Council of Australian University Librarians. (2022). *Welcome to CAUL.*

<https://www.caul.edu.au/>.

Oakleaf, M. (2010), *Value of Academic Libraries: A Comprehensive Research Review and Report*, Association of College and Research Libraries, Chicago, IL.

[https://www.ala.org/acrl/sites/ala.org.acrl/files/content/issues/value/val\\_report.pdf](https://www.ala.org/acrl/sites/ala.org.acrl/files/content/issues/value/val_report.pdf).

Queensland University Libraries Office of Cooperation. (2022). *Welcome to the Queensland University Libraries Office of Cooperation.*

<https://sites.google.com/site/qulocqld/?pli=1>.

Queensland University of Technology. (2022a). *Liaison Librarians.*

<https://www.library.qut.edu.au/about/contact/liaisonlibrarians/>.

Queensland University of Technology. (2022b). *QUT: At a glance.*

<https://www.qut.edu.au/about/our-university/qut-at-a-glance>.

Queensland University of Technology Library. (2022). *Liaison Service Vision.*  
Unpublished manuscript.

Urquhart, C. (2015). Reflections on the value and impact of library and information services. Part 1: Value identification and value creation. *Performance Measurement and Metrics*, 16(1), 86–102.

<https://doi.org/10.1108/PMM-02-2015-0005>.

Yamaguchi, M. (2018). Demonstrating academic library impact to faculty: a case study. *Digital Library Perspectives*, 34(2), 137–150. <https://doi.org/10.1108/DLP-09-2017-0034>.

## **AUTHOR BIOGRAPHIES**

### **Jennifer Thomas**

Manager, Library Service

Queensland University of Technology (QUT), Australia

Jennifer Thomas is the Manager, Library Service at the Gardens Point campus of the Queensland University of Technology (QUT) in Brisbane, Australia. She spent over a decade as a Liaison Librarian both nationally and internationally before transitioning into managerial and service management roles. She has a keen interest in data-driven decision making and evidence-based librarianship to improve library experiences for clients.

### **Joanna Logan**

Quality and Planning Manager

Queensland University of Technology (QUT)

Joanna Logan is the Quality and Planning Manager, Queensland University of Technology (QUT) in Brisbane, Australia. She worked as a Liaison Librarian in both regional and city-based universities before transitioning to her current role. She has a keen interest in building curiosity and capacity for using data and other forms of evidence to improve the student experience and library services.

## **APPENDIX A — LIAISON ENGAGEMENT DATABASE GUIDELINES**

### ***About the Liaison Engagement database***

Creation date: 18 February 2022

### **Purpose of the Liaison Engagement database**

The purpose of the Liaison Engagement database is to record Liaison activities that demonstrate engagement with the university's faculties, divisions and community partners.

This database is NOT a workload management tool.

Activities include consultations, events and the creation and use of learning resources. Activities may be performed with the assistance of Library Advisers.

Tailored reports can be generated from the database that demonstrate the value and impact of liaison work and highlight opportunities for further engagement across the university.

### ***Who uses the information in the database?***

The University Librarian (UL), Associate Director Library Services (ADL) and the Office for Scholarly Communication (OSC) have all indicated a requirement for the data in the Liaison Engagement database:

- Knowing the extent and reach of the Library's support is important when meeting with the Faculties and Divisions.
- Data is critical in highlighting opportunities for further support, for highlighting pain points and for joining forces with learning partners.

Reports can also be generated from the database that are useful for individuals when liaising with faculty and divisional partners in the course of daily liaison work. The data also contribute to the overall Library Snapshot of activities that are reported both internally and externally.

### ***Definitions of activities in the Liaison Engagement database***

#### **Consultation**

A Consultation is the process of discussing something with someone in order to get their advice or opinion, to plan, or to simply exchange information.

#### ***Guidelines for recording a Consultation:***

- All consultations with all staff and students should be recorded, regardless of role or cohort.
- Record *active* participation in School, Faculty or Research Centre meetings as a consultation.

- Active participation means contributing to the discussion at the meeting, giving a presentation or providing a report for noting or discussion.
- There is no longer a differentiation between research and non-research consultations. *\*The database helps the user to make this differentiation.*
- Consultations lasting 15 minutes or longer should be recorded.
- A consultation can take place in person, or via phone, email or online (e.g., Zoom or Teams).

## **Event**

An Event is a session of structured learning such as a class, course or training program.

### *Guidelines for recording an Event:*

- All events held for all audiences should be recorded.
- There is no longer a differentiation between research and learning and teaching events. *\*The database helps the user to make this differentiation.*
- An event can be delivered face-to-face, online or in a blended mode.
- An event includes everything you do in that event (e.g., creating handouts; showing a video or PPT; doing an activity, etc).
- Record information about events that are not made bookable through the QUT Event Registration System.

## **Learning Resource**

Learning resources are any materials or tools made available to learners. They include (but are not limited to) course and unit guides, videos, podcasts, interactive digital objects, Articulate Storylines, and padlets.

### *Guidelines for recording a Learning Resource:*

- Learning resources created for all audiences should be recorded.
- A learning resource used in multiple units is recorded separately with the unique unit code listed for each entry.
- A learning resource updated and re-used in multiple, subsequent semesters is recorded each time it is deployed, regardless of how much or little it has changed.
- A learning resource that is used widely across many units can be entered against a course code if applicable, rather than individual unit codes.
- Any materials created and used as part of an Event (see above) should be recorded against that event, and not as a learning object/s.

**Definitions of topics in the Liaison Engagement database**

<i>Topic</i>	<i>Definition</i>
AIRS	Advice/help with AIRS e.g. for individual AIRS consultations with AIRS students ...
Copyright	Copyright related advice/help
Financial data	Advice/help with provisioning the data via platforms, licence governance and assisting users to interrogate for best results and organise training
Grants	Advice/help with finding and applying for grants
Information literacy	Teaching IL skills in class or 1/1. Also include advice/help with literature searching
Library services	Advice/help with library services e.g. for library service overviews, whether covering one or more library services...
Locating and accessing resources (inc. trials/requests/other)	Advice/help with locating and/or accessing specific resources (including trials/requests/other)
OERs (Open Educational Resources)	Advice/help with finding, adapting or creating OERs
Publishing	Includes advising on publishing strategy , predatory publishers, author services platforms, and enhancing visibility and reach
PURE/ePrints	Advice/help with PURE/ORCID/ePrints ecosystem
QUT Readings	Advice/help with QUT Readings e.g. adding new Reading List items etc
Reference management software	Advice/help with using referencing management software e.g. EndNote
Referencing	Advice/help with Referencing and citation

<i>Topic</i>	<i>Definition</i>
Research data management	Includes advice/help with planning, storing, publishing and preserving research data e.g. Research Data Finder, Data Management Planning Tool
Research impact	Advice/help with research impact
Systematic reviews	Advice/help with systematic reviews
Other	Anything else that doesn't fit into one of the above categories