So, You Developed the Framework for Liaison Work. What's Next?

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Abstract

This paper will discuss the implementation of an assessment program for subject specialist liaison librarians at the University of Maryland. The framework for the subject specialist liaison librarianship at the University of Maryland was put in place in 2014. The year 2015 was the first full annual review cycle under the new guidelines. The assessment program includes procedures for assessing the liaisons' research services, collection development activities, teaching and learning services, scholarly communications, and outreach and engagement activities. This paper will discuss practical steps towards implementation, outcomes, challenges, and successes of the new program.

Introduction

In 2012, faced with changes in the environment and roles of public librarians, the associate dean for public services at the University of Maryland (UMD) Libraries convened a Liaison Services Task Force (LSTF) comprised of several faculty librarians in the public services division. The task force was tasked with developing a framework for subject liaison librarianship at the UMD Libraries based on internal examinations, conversations with colleagues at other institutions, and an extensive literature review. The LSTF worked from October 2012 through June 2013. The deliverable was the *Liaison Librarian Task Force 2012–2013, The University of Maryland Libraries, Final Report*,[1] which defined subject liaison librarianship at the UMD.

The LSTF report identified five core areas of liaison responsibilities (collection, reference, instruction, outreach, and scholarly communication/data research), and identified best practices for each of these areas. The report also provided several key recommendations: (1) the creation of CORE competencies for liaison librarians, both subject competencies and soft skills; (2) the creation of assessment methods to evaluate the work of individual liaison librarians (versus liaison program); (3) a marketing and promotional plan to advertise liaison work on campus and within the libraries; and

(4) a training program to further develop the skills and competencies of liaisons.

The report was widely and extensively circulated and discussed with all subject librarians, in their units and across the division. The entire library staff expressed great interest in the report and its implementation. It was circulated even to the university administration where it was very well received. In effect the report became the framework for liaison librarianship at UMD.

Once the report was completed, attention turned to implementation. Implementation for us translated into changes in the way we defined ourselves, viewed our work priorities and core responsibilities, and collaborated. To facilitate this change, the public services division was reorganized to have all subject librarians in the same department, now called research and learning. All our subject librarians are still divided into smaller administrative units based on function, location, or branch. The research and learning is led by the director of research and learning assisted by a management group, R&L heads, comprised of all managers in the department who are either heads of branches or functions. Since all subject librarians are in a single department, it provides for better administrative oversight and facilitates unity, cooperation, coordination, and commonalities across locations and purposes. The research and learning department also went through unifying exercises to define our common mission, vision, and goals, as well as strategic priorities, which are periodically under review.

All of LSTF recommendations were important. However, we chose to start with the development of the framework for annual reports for librarians, believing that going through such exercise on an annual basis will help all of our public services librarians ease into their new roles as liaisons. We aimed to achieve full participation in the process of implementing the new system by creating multiple opportunities for people to speak, make suggestions,

and voice opinions in private and in public forums. The new guidelines went through multiple approval levels so everyone had a chance to speak up and make adjustments.

Since the libraries had a very strong prior culture of annual, merit, and tenure reviews, and to avoid confusion, we layered the new annual assessment processes over already existing ones, but focusing it on the framework developed by the LSTF report. We also created written documents to be used by librarians and supervisors alike, composed of guidelines, examples, and templates.[2] These documents are easily accessible to our staff since they are placed on the internal libraries website and are updated as needed.

The annual report for liaison librarians is divided into three main categories: librarianship, service, and scholarship/creativity. This strictly follows our library faculty guidelines for promotion and permanent status review, which makes it easier for people to build their dossiers for promotion when the time comes. In fact, our non-permanent status librarians were the leading catalyst for developing this process. They wanted clearly stated annual review procedures that can help them grow both professionally and within the organization. They are still some of the biggest proponents of the current review.

For the purpose of this paper, we will concentrate on the category of librarianship. This category as pertaining to our subject librarians is broken into five areas as prescribed in the LSTF report: collections, instruction, reference, outreach, and scholarly communication/data research. We combined scholarly communication and data research into one category for the time being since we felt that activities in those areas are still relatively low and uneven in comparison to other areas.

Easing it in

We staggered implementation. In the first year (2014), we asked liaisons to demonstrate activities in at least three out of five categories of liaison activities identified by the report, to ease folks into the process. In the next annual cycle (2015), we changed that to full compliance, as we moved further in the implementation stages. After living with the new system for the first year we also came to the realization that we did not have a common understanding of what our expectations should be,

i.e., what set of skills was appropriate for our work across all disciplines and locations. For example, what are subject librarians' responsibilities towards bibliographic management software: does each one of us offer services related to this and at what level? On this issue alone we had opinions ranging all along the spectrum. Thus, in order to have a meaningful assessment, we had to arrive at a common understanding of our CORE competencies, both subject- and skills-based, which incidentally was another of the LSTF report's recommendations.

In late 2014, we developed *CORE Competencies for Subject Specialist Liaison Librarians, Research Services, Public Services Division, University of Maryland Libraries*,[3] both subject- and skill-based, which we are using now as the baseline for all subject librarians, regardless of discipline or location. As with all other big decisions, this was truly a communal effort, which went through an array of public and private discussions and various levels of approval. These CORE competencies became effective on January 1, 2015. They are designed to be a self-motivating developmental tool for liaison librarians, guide their individual work, and provide a training framework based on individual needs, especially for new hires. As our annual review cycle is calendar-based, we implemented the newly defined CORE competencies just in time for the 2015 annual review cycle.

What assessment means to us

From the start, we viewed liaison annual assessment as a developmental tool for individuals, where the conversation between librarian and supervisor is an integral part of good performance. The purpose and goals of assessment are aimed at fostering the individual's professional growth, not punitive outcomes. The assessment is a measurable indicator of an individual's engagement with his or her work, particularly in relationship to the faculty and departments we serve. It is a series of benchmarking on the part of an individual that show support for institutional goals. These goals are intimately connected to the unit, departmental, and the libraries' strategic goals, as well as the promotion and tenure review policies and procedures as shown above.

We want our assessment to be meaningful, manageable, sustainable, actionable, and motivational. The main focus of evaluation is to encourage liaisons to demonstrate the impact of

their activities and why they are important. For example, it is wonderful if someone taught fifty subject classes a year, but what was the impact of such effort? What did students learn? Did the librarian do anything differently from one session to another? Was this effort worth the work that went into it? Prior to this we just did not consider those issues. Our librarians can demonstrate the impact of their activities in a variety of different ways, including assessments, statistical data, speaking or publication opportunities, and kudos or comments from faculty, students, and/or colleagues. None of these measures are draconian in our view, and folks have quite a bit of freedom in deciding on what, when, and how to use as evidence to substantiate their points.

Since individual growth is an important part of our assessment, it is important to acknowledge failure as a part of growth. Success does not come right away; it comes through trial and error and personal reflection on those efforts. To develop new ideas takes a lot of time, energy, and courage. Thus it is important to allow people room to experiment and to give them credit for their efforts, successful or not, as long as they are within institutional goals. Another important part of the assessment is for supervisors to help individuals identify areas where improvements might be needed and to help identify possible training to remedy deficiencies. And of course we want to highlight and celebrate individuals' achievements and hard work, both privately and publically. To that end we have a regular kudos column and a regular newsletter that highlights achievements on our subject librarian's website, http://www.lib.umd.edu/rc/meet-your-librarian.

Results

With all the right elements in place, 2015 became our first year of full-fledged liaison assessment. The criteria for liaison work and CORE competencies allowed supervisors of liaison librarians to evaluate performance in a more meaningful way, celebrate achievements, identify areas of improvement, and recommend appropriate training if needed. Based on these assessments we have identified several weaker skills, some across the board and some in certain individuals, which we are in the process of addressing through training, internal and external, for both individuals and groups. In some cases, we modified assignments to better fit individual strength and organizational needs.

We believe that we have been able to better help our librarians who do not have permanent status yet in building up their dossier, and making them more comfortable in the process. We have also noticed an increase in productivity and a higher rate of merit awards for 2015 (all merit is reviewed by a Faculty Merit Committee independent of supervisors). Overall the first two years of implementation went well and we have learned a lot about our work and performance. We still are getting comfortable with this tool, and it will take some time to reach its full potential.

We deeply understand that any assessment program of liaison librarians, including ours, is a perpetual work in progress. It has to be able to shift with the changes in our environment, strategic priorities, and overall growth. It will be important to regularly assess and adjust the process as circumstances dictate. Consequently, we believe that in its totality our assessment of liaisons shows the libraries' impact on the strategic goals of the university. In all, assessment becomes a reflection of the individual and the organization.

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Endnotes

1. Y. Luckert, D. Mack, S. Baykoucheva, and P. Cossard, *Liaison Librarian Task Force 2012–2013, University of Maryland Libraries, Final Report, 31 May 2013* (College Park, MD: University of Maryland Libraries, 2013), http://drum.lib.umd.edu/handle/1903/17456.

2. Y. Luckert, *Guidelines and Forms for Annual Reporting of Subject Specialist Liaison Librarians, Research Services, Public Services Division, University of Maryland Libraries* (College Park, MD: University of Maryland Libraries, 2015), http://drum.lib.umd.edu/handle/1903/18056.

3. Y. Luckert, *CORE Competencies for Subject Specialist Liaison Librarians, Research Services Public Services Division, University of Maryland Libraries* (College Park, MD: University of Maryland Libraries, 2015), http://hdl.handle.net/1903/17457.