Performance Measures for Liaison Librarians: Documenting Impact to Communicate Value

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Introduction

A recent publication by the Association of Research Libraries (Jaguszewski & Williams, 2013), discusses how liaison roles are changing in research libraries. According to the authors:

“In the past, libraries focused largely on capturing the end products of scholarship, and the bibliographer model was designed to fulfill that goal. Then, the liaison model evolved, recognizing the need for advanced library research assistance within the disciplines and instruction in general library research processes for students. With increasing pressure on researchers to plan and manage their output, and a growing adoption of open access publishing, research libraries are now compelled to understand and support all processes of instruction and scholarship, which calls for an engagement model. An engaged liaison seeks to enhance scholar productivity, to empower learners, and to participate in the entire lifecycle of the research, teaching, and learning process.”

At the University of Maryland Libraries, a liaison task force was formed to discuss the changing nature of liaison activities and to develop guidelines and assessment tools to document these new roles.

Methodology

The liaison task force met over the course of an academic year to review existing research and to develop guidelines for changing activities. The task force developed measures to document the impact of these librarians’ work, and to communicate their value in five broad areas of responsibility:

1. Research Services
2. Collection Development/Collections Content and Access
3. Teaching, Learning, and Literacies
4. Scholarly Communications, Digital Scholarship and Data Management
5. Outreach and Engagement
In addition, professional development tools and guidelines were developed to implement expectations into the annual liaison assessment process. These new expectations are framed in three areas: institutional setting and environment, policy creation, and program implementation. The liaison task force report is available at:  http://drum.lib.umd.edu/handle/1903/17456.

Institutional Setting and Environment

At the University of Maryland and at other research universities, the library and librarians are not merely resources for finding, accessing and evaluating information, but are taking on new, active roles in the areas of research partnership/consulting, teaching, knowledge creation, and digital scholarship and data curation. As part of this planning, the libraries must look to the broader institutional environment and strategic goals in order to map its own activities to the wider organizational mission. In order to do so, the libraries needed to identify both metrics and qualitative indicators for assessing liaison librarians’ work, and to plan how these performance measures can communicate impact to the larger organization. Five sample rubrics are listed below which we initially implemented (Mack & White, 2014). As discussed later, individual liaisons are encouraged to develop specific rubrics that are directly related to their own professional activities.

Research Services

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| Provide effective, responsive research/reference services via all media: telephone, chat, IM, social media | • Provide training programs, discussion forums, and avenues to share best practices | • Actively seek out ways to improve services  
• Work with peers or mentors to develop plan for skill acquisition and improvement |
| Offer individual research consultations/office hours | • Integrate into work plan/overall workload; training for best practices | • Schedule, plan, and promote availability  
• Be proactive and visible to assigned departments  
• Create goal of meeting with each faculty member at least once per year |
| **Possess excellent customer service skills: civility, respect for diversity, approachability, timely responses/timely follow-up** | • Create customer service training program with expectations and method of assessment | • Proactively seek to improve skills  
• Develop good time management skills  
• Elicit feedback and other assessments |
| --- | --- | --- |
| **Provide written/electronic reference guides** | • Create standards for guides  
• Provide infrastructure for creation, maintenance, and support | • Develop plan for creating and updating guides on a regular basis  
• Stay up-to-date on resources and tools available  
• Consult with peers and professional colleagues on best practices |
| **Monitor and understand changes in the production of knowledge in subject disciplines as well as in general** | • Encourage and support continuing education  
• Support participation in college and department activities  
• Provide forums for sharing new developments and gaining skills | • Monitor and read professional literature of the disciplines  
• Participate in department activities  
• Meet with faculty and students individually to understand research needs |
| **Gather, document, and analyze data; conduct ongoing assessment of services** | • Create framework for gathering and documenting data  
• Provide central support for methods of assessment | • Work with administration and mentor to develop plan of assessment  
• Develop plan for gathering and documenting activities and do so consistently |
### Collection Development/Collections Content and Access

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| Meet with collegiate faculty to discuss collections needs | • Provide workshops/forums led by successful liaisons  
• Provide educational opportunities to enhance subject expertise  
• Hold meetings between library administration and college deans to discuss needs and strategies for resources  
• Provide framework for best practices in how to approach/conduct meetings and in how to develop ongoing relationships | • Shadow other liaisons  
• Seek out mentors who are successful liaisons  
• Investigate individual faculty research interests  
• Read college/departmental strategic plans  
• Investigate departmental websites for news/changes  
• Keep abreast of curricular changes/proposals and be proactive in suggesting needed resources  
• Volunteer to attend departmental meetings  
• Attend college/departmental functions |
| Advise the administration on future collections needs | • Provide a framework and schedule for regular communications  
• Develop best practices for how this information is communicated and shared  
• Develop standardized procedures that articulate how new resources are acquired | • Set up regular meetings with collections officers  
• Create a regular/annual collections plan for assigned disciplines  
• Communicate curricular proposals and changes and related collections needs to collections officers |
| Participate in the governance of collection development | • Create a model of shared governance for collections that includes opportunities for participation and leadership  
• Facilitate participation and leadership in workshops/forums | • Investigate how similar subject liaisons at other institutions participate and advocate for their subject areas  
• Work with supervisor/mentor to participate in these service activities |
| Manage physical and digital collections | - Create and communicate clear framework and vision for collections  
- Offer educational opportunities for managing collections, especially for new and evolving areas (e.g., e-books, born-digital)  
- Develop and communicate clear procedures for managing collections—acquisitions, licensing, withdrawals, etc.  
- Develop and communicate collections funds framework responsibilities for liaisons  
- Articulate expectations regarding development, gifts, stewardship | - Develop clear understanding of current collections in both digital and physical formats  
- Investigate and participate in educational workshops or other activities for management of collections in specific disciplines  
- Participate in regional and national groups of peers to develop best practices  
- Meet with development personnel to develop strategies and practices for facilitating donor relations and stewardship activities |
|---|---|---|
| Create subject-specific collections policies | - Provide framework for creation of policies that clearly articulates format, content, and time line for policies  
- Create plan for publicizing/communicating collections policies | - Investigate existing collections policies at other institutions  
- Work with other liaisons to discuss/create policies in areas of overlap  
- Consult with faculty to ensure that policies are aligned with curricular and research needs |
| Develop ongoing assessment program/activates for collections in assigned areas | - Established fiscal calendar for spending  
- Institute organizational policies and procedures for collections assessment  
- Incorporate expectations into annual reviews and work plans  
- Create and conduct training programs for collections assessment | - Regularly survey faculty on research and collections needs  
- Meet all new faculty to assess collections needs  
- Monitor new programs and proposals for new programs  
- Assess collections needs for accreditation reviews  
- Participate in library-wide reviews of collections  
- Work with supervisor/mentor to develop individual assessment plan |
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<td>• Communicate and share new resources and tools</td>
<td>• Keep abreast of new collections</td>
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<td>resources and research tools and how to use them</td>
<td>• Provide training and assistance in development of online tools</td>
<td>• Work with peers locally and nationally</td>
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<tr>
<td>Collaborate in the design, implementation, and maintenance of online</td>
<td>• Share best practices</td>
<td>• Actively develop needed skills and keep abreast of new technologies and tools</td>
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<td>tools and services that meet the needs of users</td>
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<td>Proactively establish partnerships with teaching faculty and researchers</td>
<td>• Incorporate expectations into individual work plans</td>
<td>• Set up individual meetings on a regular basis</td>
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<td>Become more active participants in courses; move away from single sessions</td>
<td>• Provide support for use of online tools for general tutorials</td>
<td>• Meet all new faculty</td>
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<td>Conduct needs assessment; understand needs of community of users</td>
<td>• Provide resources and time for librarians to become embedded</td>
<td>• Develop research and interest profile for each</td>
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<tr>
<td>Understand research and scholarly communication patterns of disciplines</td>
<td>• Provide training and support for blended learning and flipped classroom approaches</td>
<td>• Partner with faculty to develop objectives and assessment tools for information literacy</td>
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<td>Teach in subject-specific and general curriculum courses</td>
<td>• Provide professional development opportunities</td>
<td>• Seek integration into courses via course management systems</td>
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<td>• Encourage interaction with disciplinary faculty</td>
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<td>• Work with program coordinators and department heads</td>
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<td></td>
<td>• Offer variety of possible ways to teach</td>
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| Develop and implement innovative instructional design approaches and formats | • Support professional development of librarians devoted to instruction  
• Offer workshops and forums  
• Provide technologies and tools | • Participate in professional development activities related to teaching  
• Proactively seek out innovative techniques and tools |
|---|---|---|
| Develop skills via conferences, seminars, and professional development activities | • Provide centralized funding and expectations for participation  
• Develop internal program of professional development  
• Hire those with needed skills | • Devote professional development time and energy to teaching  
• Participate in organizational programs  
• Seek out free resources and communities of practice |
| Develop appropriate qualitative and quantitative assessment methods that evaluate impact on student performance and retention | • Provide centralized training and support for assessment activities  
• Offer workshops and forums for skill development  
• Develop techniques and mechanisms for reporting to institution | • Seek out necessary training  
• Develop best practices along with community of peers  
• Participate in organizational activities |
| Acquire and use feedback from students and faculty | • Develop organization-wide tools for obtaining feedback  
• Collect and analyze feedback for the organization as a whole and for individuals | • Develop specific tools and techniques for gathering regular feedback  
• Seek alternative methods targeting different populations  
• Develop communications plan for how feedback is being used |
| Participate in a culture of quality by continuously evaluating and adjusting instructional methods | • Provide centralized tools for evaluation and easy mechanisms, tools, and spaces to adjust instruction  
• Encourage innovation and experimentation and sharing of best practices | • Work with peers and colleagues to develop innovative approaches  
• Experiment with new approaches and evaluate outcomes |
| Proactively explore new opportunities for teaching | • Place a value on teaching; facilitate opportunities  
• Provide necessary resources (time, equipment, space, support) for teaching | • Discuss options and opportunities with individual faculty  
• Share possible ways of integrating library instruction into course content  
• Seek out participation in new courses |
Understand and participate in course management systems
- Partner with centralized IT to ensure library integration
- Build tools and programs to ensure easy integration of librarians and library resources

Keep abreast of learning trends, including in-person, blended, and online
- Provide centralized training, workshops, forums, webinars
- Support professional development of instructional librarians
- Connect with campus leaders in teaching and learning
- Regularly read the higher education and library literature
- Participate in professional programs and activities
- Monitor campus activities regarding teaching and learning

### Scholarly Communications/Digital Scholarship and Data Management

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<tr>
<th>Expectation</th>
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<tbody>
<tr>
<td>Educate and inform faculty and students about relevant issues</td>
<td>• Develop expertise through scholarly communications program</td>
<td>• Participate in educational and training activities</td>
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<td></td>
<td>• Offer training programs for liaisons</td>
<td>• Discuss best practices for communicating and working with faculty</td>
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<td></td>
<td>• Publicize activities and information to campus community</td>
<td>• Include information on scholarly communications in orientation and other programs</td>
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<td></td>
<td>• Work with campus leaders on relevant issues</td>
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<tr>
<td>Advocate for sustainable models of scholarly communication</td>
<td>• Provide campus leadership in scholarly communications issues</td>
<td>• Communicate regularly with college and departments about library-wide efforts as well as national trends</td>
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<td></td>
<td>• Provide framework and training for individual librarians</td>
<td>• Seek ways to advance efforts</td>
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<tr>
<td>Work closely with faculty and students to understand their workflows and patterns of scholarly communications</td>
<td>• Provide high-level training and resources for gathering and analyzing information</td>
<td>• Develop regular schedule and tools for systematically gathering and analyzing information</td>
</tr>
<tr>
<td>Develop tools and services to facilitate scholarly communications</td>
<td>• Provide centralized support for gathering information and for offering services</td>
<td>• Work with library leaders and national experts to develop discipline-specific tools and services</td>
</tr>
</tbody>
</table>
| Develop expertise in copyright, data curation, and open-access issues that are relevant to subject areas | • Create or hire copyright/data curation/open access specialist(s)  
• Provide broad training on relevant issues  
• Develop centralized Web presence for tools and info | • Seek out training and skills related to copyright, data curation, and open access  
• Understand relevant issues related to one’s discipline and for various formats |
|---|---|---|
| Develop knowledge or expertise in research data management | • Hire or train librarians in this area  
• Develop training and workshops | • Seek out training and skills related to RDM  
• Understand important RDM issues related to one’s discipline and for various formats |
| Support and promote use of institutional repositories | • Promote repositories at institutional and national level  
• Support use by librarians  
• Provide easy ingest and retrieval  
• Support various formats and functions  
• Support development and maintenance of repository | • Develop expertise in using  
• Deposit one’s own works  
• Integrate into orientations, activities, webpages, and outreach materials |
| Help design and implement online tools and services to meet the needs of discipline/interdisciplinary research communities | • Conduct needs assessment  
• Work with campus research offices and research administration to develop priorities and plan | • Work with disciplinary research centers  
• Conduct needs assessment |
| Document and share practices | • Develop and promote tool kits, forums, and workshops  
• Support professional development activities outside institution | • Incorporate into work plans and review documents  
• Share best practices with disciplinary peers |
| Assess individual programs and participate in broader assessment programs that include both qualitative and quantitative components | • Provide framework for assessment  
• Establish guiding principles and expected practices  
• Provide training in assessment tools | • Develop individual plan of assessment and incorporate items into work plans  
• Obtain skills in qualitative and quantitative assessment techniques  
• Participate in institutional assessment programs |
### Outreach and Engagement

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<td>Collaborate in the design, implementation, and maintenance of online tools and services that meet the needs of users</td>
<td>• Provide training and assistance in development of online tools&lt;br&gt;• Share best practices</td>
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<td>Proactively establish partnerships with teaching faculty and researchers</td>
<td>• Incorporate expectations into individual work plans&lt;br&gt;• Establish partnerships and build relationships at organizational level</td>
<td>• Set up individual meetings on a regular basis&lt;br&gt;• Meet all new faculty&lt;br&gt;• Develop research and interest profile for each</td>
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<td>Become more active participants in courses; move away from single sessions</td>
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<td>Conduct needs assessment; understand needs of community of users</td>
<td>• Provide centralized support and training for conducting needs assessments/surveys&lt;br&gt;• Develop best practices</td>
<td>• Partner with peers and faculty to develop appropriate tools&lt;br&gt;• Analyze national trends&lt;br&gt;• Develop schedule of assessment activities</td>
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<td>Understand research and scholarly communication patterns of disciplines</td>
<td>• Provide professional development opportunities&lt;br&gt;• Encourage interaction with disciplinary faculty</td>
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| Teach in subject-specific and general curriculum courses | • Provide framework for teaching expectations  
• Provide resources, spaces, and technology to enable teaching to occur in a variety of formats/spaces | • Actively seek out opportunities  
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| Participate in a culture of quality by continuously evaluating and adjusting instructional methods | • Provide centralized tools for evaluation and easy mechanisms, tools, and spaces to adjust instruction  
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**Program Implementation and Policy Creation**

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 in easing 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 LSTF Report. We also created written documents to be used by librarians and supervisors alike, composed of guidelines, examples and templates. 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 the 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.

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 realization that we did not have a common understanding of what are 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 competences, both subject and skills based, which incidentally was another of the LSTF Report’s recommendations.

In late 2014, we developed CORE Competences for Subject Specialist Liaison Librarians, Research Services, Public Services Division, University of Maryland Libraries, both subject and skill-based, which we are using now as the baseline for all subject librarians, regardless of discipline or location (see http://hdl.handle.net/1903/17457). 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 competences 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 competences just in time for the 2015 annual review cycle.
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 hers work particularly in relationship to 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, and the promotion and tenure review policies and procedures as shown above. Annual report documents used at the University of Maryland are available here:  [http://drum.lib.umd.edu/handle/1903/18056](http://drum.lib.umd.edu/handle/1903/18056).

We want our assessment to be meaningful, manageable, sustainable, actionable and motivational. The focus of evaluation is to encourage liaisons to demonstrate the impact of their activities and why they were 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 different 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 the way, 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 deficiency. And of course we want to highlight and celebrate individuals’ achievements and hard work, both privately and publically. To that end, we have regular kudos column as well as a regular newsletter that highlights achievements on our subject librarian’s website, [http://www.lib.umd.edu/rc/meet-your-librarian](http://www.lib.umd.edu/rc/meet-your-librarian).

An important component of implementation is to actively address and manage conflict, resistance, fear, uncertainty, and other barriers. We chose to enter this process in a very open, collaborative manner, and one in which we continually emphasized that there would be support for professional development as liaisons took on new, emerging roles. Our goal was to eliminate fear and uncertainty as much as possible as these can
have a paralyzing effect and can lead to inactivity or resistance. This is an ongoing process as individuals adopt and progress at different paces depending on their backgrounds, skills, clientele and self-confidence. We feel we have been largely successful because we have provided clear expectations and rubrics, but at the same time allowing for individual focus on those areas that are most appropriate to a specific liaison. As such, the library administration has sought to create a learning environment with an abundance of professional development activities and support as well as to create venues for the sharing of successes, best practices, and failures.

Communicating Value

In time of rapid and fundamental changes in academic and library landscapes, libraries are increasingly engaged in assessment activities to monitor and measure their impact. A successful liaison program is critical to meeting library and institutional goals, to demonstrate how librarians are contributing to the broader institutional mission, and how libraries are providing value in their support of research, teaching and learning. Many institutions of higher learning re-deploy their librarians to meet their strategic goals. However, how do we know what is successful and what is not, and where do we need to put our energy and resources? Proper assessment tools will help build and develop a meaningful liaison program, specific to any given institution.

Communicating value is a multilevel marketing effort that needs to occur at the individual and organizational levels. Individual liaisons must be able to articulate their services and to proactively contact and work with constituents. Because success leads to more success and an appreciation of the added value of these services, initiating and demonstrating success to key early adopters is crucial. One aspect that worked well was a faculty interest survey in which faculty were queried about possible services from the library. At the organizational/library level, efforts can be made to promote and market these services. At the University of Maryland this is done via our communications department, with direct mailings and promotions to our users, and also through the establishment of our “Research Commons” – a physical and virtual resource that was developed to directly promote liaison services to our research community (see https://www.lib.umd.edu/rc). A key component to this initiative is active partnership with key units, including the campus office of research, division of information technology, and the graduate school. Offering joint services in a centralized manner assists in communicating new and emerging services while aligning ourselves with other units that are perhaps more established in the minds of faculty and researchers with less traditional types of assistance.
With a greater emphasis on assessment and demonstrating impact and outcomes in higher education, the assessment of liaison work provides a great deal of insight to library administrators, which they can use in allocating resources and presenting a positive vision of the library to campus administration. The assessment is also a very powerful tool for liaison librarians themselves, in seeing the impact of the work they are doing, how they connect to their campus environment, and where they need improvement and growth. As the nature of liaison work continues to evolve, it is imperative that liaison librarians adapt their work and develop appropriate assessment tools to demonstrate the positive impact of their activities.

References


