

To: Rosann Bazirjian, Dean of University Libraries  
From: Liaison Collection Responsibilities Task Force  
September 7, 2012

## Final Report of the Liaison Collections Responsibilities Task Force

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## A. Task Force Charge

The enhanced responsibilities of our liaisons have created some very real issues regarding the amount of time that can be spent on collection development. As new responsibilities emerge, and the way in which we handle collection development has changed, it is time to examine how we are organized to manage all of these competing responsibilities. To that end, this task force is charged to:

1. Define the collection development, instruction, outreach, and newly defined and enhanced responsibilities of our liaisons.
2. Define the ways that collection development has changed over the years.
3. Benchmark with other libraries to see how they are handling the complexities of liaison responsibilities in new, creative and innovative ways.
4. Recommend an organizational model for collection development and other liaison responsibilities that will allow us to give the proper attention to both areas in a sleek and efficient way. More than one organizational model should be recommended providing alternatives to choose from.

The Task Force is encouraged to consult/talk with others in the Libraries and to consider focus group interactions with academic faculty members in order to provide more voices to the final report.

### **Updated charge from AAG after its June retreat**

AAG would like the liaisons to focus on public service work and spend much less time on collections.

### **Task force members:**

[Beth Bernhardt](#)

[Steve Cramer](#) (Chair)

[Mike Crumpton](#)

[Amy Harris](#)

[Nancy Ryckman](#)

## B. Major Responsibilities of Liaisons

This is a summary of the most important possible responsibilities of liaisons. The actual work a liaison does will vary by his/her skill sets and the academic departments being served. (The issue of varying skill sets would be mitigated by the adoption of subject teams.)

### 1. Teaching

- Teach library & research instruction for classes, departments and other groups (ex. new graduate students) in classrooms and computer labs as well as online using distance education software.
- Work with professors on information literacy goals, instructional design and creating research assignments.
- Create and maintain class guides (ex. Libguides) and Blackboard links to library resources.
- Create digital learning objects (ex. videos) to assist with instruction.
- Assess information literacy skills.

### 2. Research support & consulting

- Provide consultations to students and faculty. (Consultations usually last at least 15 minutes, may be held in library offices, group study spaces, or other campus buildings, and feature complex and/or multi-step research support or training).
- Provide subject-specific research and reference services in person and through email, phone, chat, DE software, etc.
- Provide support of citation management tools, current awareness tools, and others.

### 3. Outreach & Promotion

- Provide outreach to departments, schools, Learning Communities (LCs), student groups, and academic and service centers. (Outreach includes attending academic departmental meetings, new student orientation, and special events; creating promotional fliers, web content, or videos; introducing oneself to new faculty, students, and staff in person or via email, etc.)
- Embed in classes and LCs.
- Participate in faculty and departmental events and monitor departmental, school, and student organization developments through social media.
- Create digital learning objects (ex. videos) to support outreach and promotion.

#### **4. Collections**

- Oversee development of print book collections and modifications of approval plans; coordinate the work of faculty liaisons in firm order budget selecting; select books as needed.
- Evaluate parameters and options for patron-select ebooks.
- Evaluate databases, ebook packages, and other resources for potential purchase or subscription; advocate for subscriptions funded through the XDBS, serials, and DE budgets.
- Evaluate subscriptions for possibly cancellations and weed physical collections to maintain the quality and support space planning goals.
- Share news of new and updated resources with faculty.
- Analyze usage data.
- Contribute to reaccreditation review reports, new academic program applications, and grant proposals.

#### **5. Scholarly Communication**

- Promote open access and other scholarly communication options to faculty.
- Promote submitting content to NC DOCKS and the publishing of electronic journals using Open Journal System software.
- Keep up with trends and developments and share them with faculty as needed.

#### **6. Professional/Skills Development**

- Maintain and develop skills in teaching, assessment, instructional technology, and outreach.
- Maintain and develop subject expertise and knowledge of subject-specific research tools
- Maintain training-level knowledge of general-use scholarly tools like EndNote, Web of Science, etc.

#### **Notes:**

A 2010 version of a list of liaison responsibilities (with a narrative introduction) is posted at [http://library.uncg.edu/info/library\\_liaison\\_responsibilities.aspx](http://library.uncg.edu/info/library_liaison_responsibilities.aspx).

An older, shorter version (perhaps now an orphan web page) is posted at [http://library.uncg.edu/info/liason\\_department\\_responsibilities.aspx](http://library.uncg.edu/info/liason_department_responsibilities.aspx).

## C. Strengths and Weaknesses of our Current Liaison Organizational Model

### **Our Current Organizational Model**

- The Assistant Director for Collections and Technical Services (AD) supervises the Collections and Scholarly Resources Coordinator (CSRD). The CSRD supervises one half-time employee who works on the institutional repository.
- The AD and the CSRD regularly organize collections and liaisons meetings.
- There is no direct supervisory or evaluative authority over the liaisons for their liaison-specific responsibilities.
- Liaisons are based in many departments. Each liaison is supervised and evaluated by his or her particular department head.
- Academic credentials, experience, personal interest, or organizational need usually determine which liaison is assigned to a specific academic department, to a student group, or to one of the many learning communities.
- Requests for materials may go to the liaison, the AD, the CSRD, or to Acquisitions.
- Requests for class instruction may go to the liaison or to the Literacy Instruction Coordinator based in the Reference and Instructional Services Department (RISD).
- The majority of the liaisons are in RISD which has occasional discussions about teaching, assessment, and other public service aspects of liaisons work. The Library Instruction Coordinator is based in RISD.
- The Distance Education Librarian (who is also a liaison) is based in ERIT.
- Partnerships between two or more librarians and/or staff members who will share liaison responsibilities are being explored.

### **Strengths of the Current Model**

1. Every academic department, many student groups, and some learning communities have a specific liaison assigned to them.
2. Teaching faculty and students have the name of a single contact person they can rely on for assistance.
3. Individual liaisons, working with the same departments or individuals over time, build rapport that may encourage more contact between the liaison and the faculty and students in that department or group.
4. Liaisons are empowered to focus on the aspects of liaison work they most enjoy or for which they have the most expertise.
5. Liaisons are empowered to make decisions and seek assistance from other liaisons without going through a supervisory structure.

## **Weaknesses of the Current Model**

1. There is no holistic supervisory or evaluative structure for either the liaison program or the individual liaisons.
2. Liaisons are based in several library departments; therefore, each may be evaluated in a different way by the supervisor on that person's liaison responsibilities.
3. There is no central, regular reporting of liaison activities (including success stories and innovations) or statistical data. We do not review service gaps for potential improvements for academic departments.
4. There is no dedicated SPA or student worker support of liaison activities.
5. We expect each liaison to be very skilled in all aspects of liaison work: teaching, assessment, outreach, collections, instructional technology, etc. That expectation is not realistic.
6. Liaisons may be assigned to departments for which they have no subject expertise or personal interest thus making it more difficult to offer substantive assistance to the assigned unit.
7. There are considerable discrepancies in the amount of time liaisons devote to their specific departments, students, and other campus groups such as LCs. Students and faculty in some units may require extensive use of the liaison's time while other units require little time.
8. While providing instruction is expected of every liaison, meetings on best practices for teaching tend to be limited to the liaisons in RISD.
9. There is a "one size fits all" approach to liaison work with no provision for prioritizing which departments should get more attention and effort based upon the number of their constituents, their reliance on library resources, the need for research instruction, or the department's strategic importance to the university.
10. As the campus adds more PhD programs, LCs, student groups, research centers, etc., and as library services and liaison responsibilities continue to grow, it becomes more difficult for the current liaisons to absorb the extra work. (This challenge became even greater when the library lost a liaison position to Library Administration in 2009.) Our current liaison model is not sustainable.

## D. Benchmarking

We benchmarked innovative organizational models through:

- Searching the Library Literature database
- Browsing the library web sites of the UNC and peer campuses
- Searching library web sites
- Asking around at summer conferences

We couldn't find any articles directly addressing innovative liaison models. Some articles discussed the changing roles of the subject specialist in collections work; a few discussed the results of liaison partnerships. Three recent articles that proved most relevant to the task force's charge are listed and summarized in the Appendix.

We did not find any evidence of innovative models at other UNC or peer campuses. However, we did find two examples through Google searches: Villanova and Johns Hopkins. Beth Filar Williams learned about an interesting decentralized model through a friend at Utah State. We contacted those three libraries to learn more about how their models work. We also discussed issues with liaison work with a group of Wake Forest librarians as well as the liaison coordinator at UNC Chapel Hill.

Below we present our key findings based on our surveys, and details on the Utah State, Villanova, and Johns Hopkins models.

### **Our key findings:**

1. Most academic libraries have a decentralized liaison organizational model like ours.
2. Most libraries – *unlike* ours – have a collections department. The smallest such departments have a department head and several staff members; larger ones include a mix of staff and library faculty. (Some of these departments have positions that roughly correspond to positions we have in Acquisitions and ERIT.)
3. Some libraries have co-liaisons or liaison partners, with staff, library faculty, or LIS interns working with the original liaison. A few libraries have liaison teams, ex. the “Humanities Team.”
4. Only a few libraries have centralized departmental models for liaison work. Johns Hopkins and Villanova are examples.
5. Some large research libraries have formally prioritized the responsibilities of liaisons -- making engagement, not collections, the top priority. This trend seems to have begun with Minnesota. Duke, Kansas, and Washington are following Minnesota's example.

## Utah State

Summary: Decentralized subject teams with functional coordinators. The liaisons continue to be based in several traditional library departments. The task force feels this is an admirable and holistic approach for organizing decentralized liaisons, but still perpetuates the weaknesses of a decentralized model.

This narrated PowerPoint describes the new model succinctly:

Flora G. Shrode, Jennifer R. Duncan, and Wendy Holliday. "An Entrepreneurial Approach to Librarianship" ACRL/LLAMA Spring Virtual Institute. Apr. 2010.

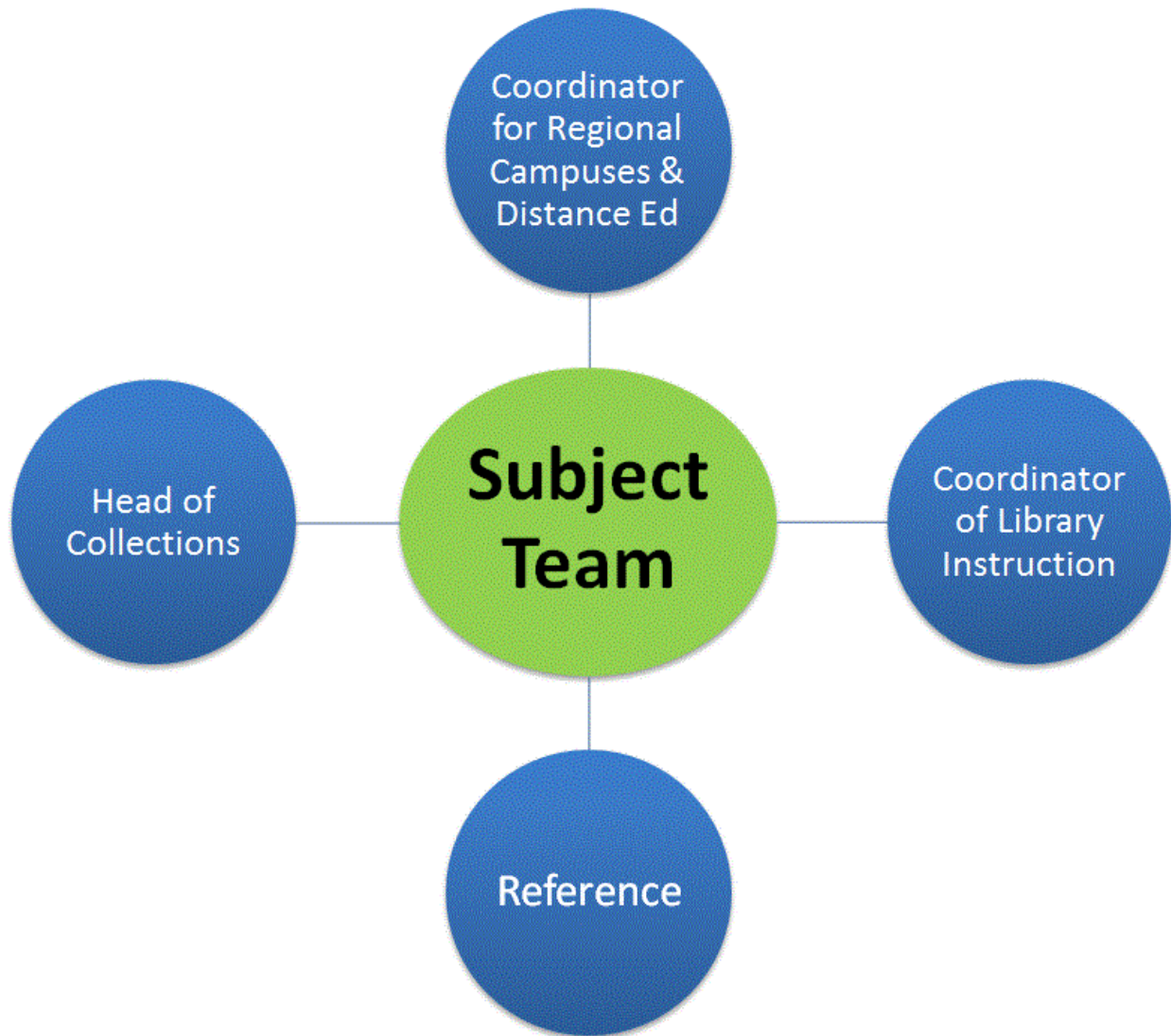
[http://works.bepress.com/jennifer\\_duncan/21/](http://works.bepress.com/jennifer_duncan/21/)

Abstract: Librarians from Utah State University explain recent efforts to encourage subject librarians to take a more holistic view of their roles. We are shifting from a traditional emphasis primarily on collection development and refocusing on natural connections between collections, instruction, liaison, and reference service. The poster provides background about Utah State University's situation and explains our approach to analyzing local needs and culture to inform development of a new organizational structure. We describe our vision of subject librarianship, the process by which we assessed librarians' ideas and goals for performing as subject librarians, and the actions we are taking to accomplish our goals.

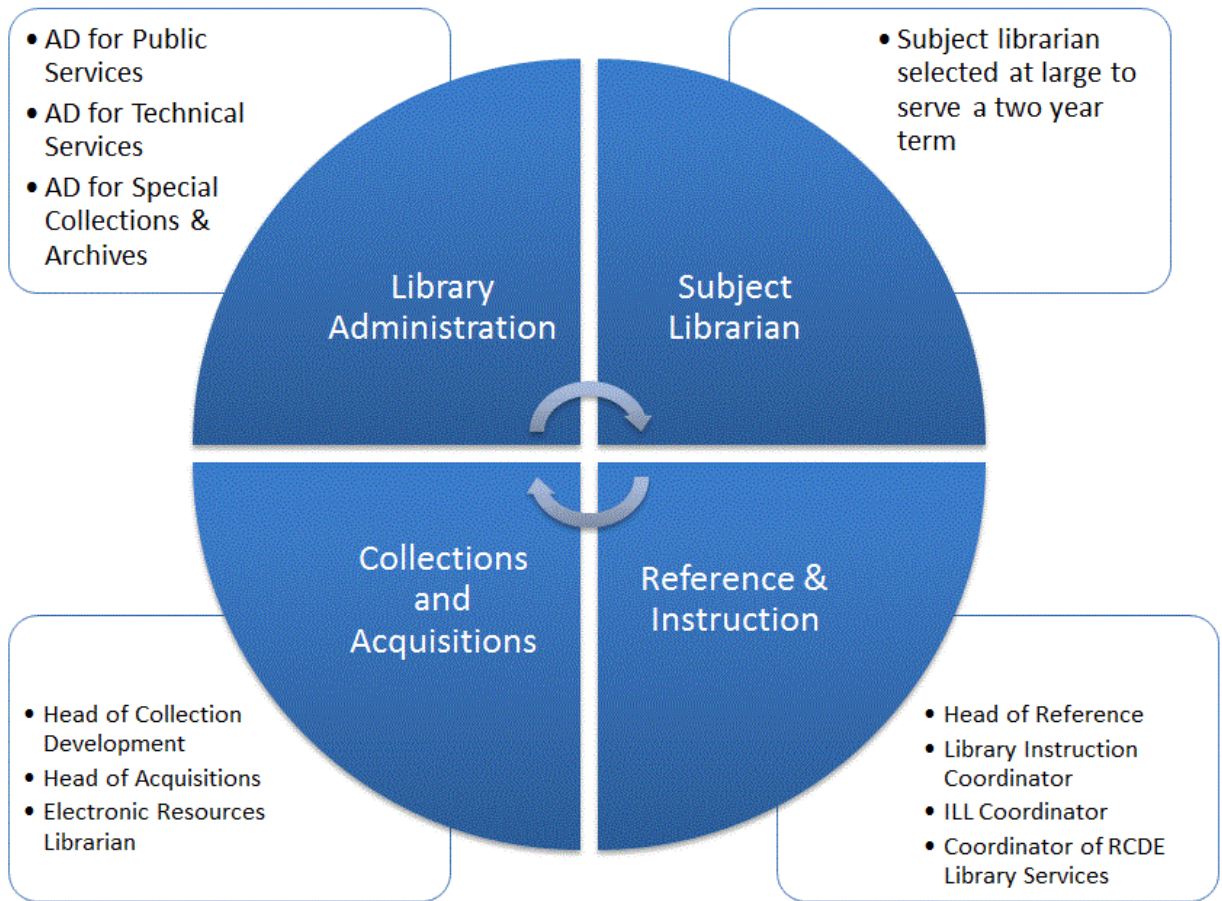
The involvement of the four coordinators (Head of Reference, Head of Collections, Coordinator for Regional Campuses & Distance Education, and Coordinator of Library Instruction) in the work of the subject teams emphasizes the core responsibilities of liaisons at Utah State.

All the subject librarians meet monthly; the four coordinators plan the agenda. Oddly, the subject teams only meet a few times a year. (In addition, the liaisons have their normal departmental meetings, ex. the liaisons in Reference Services attend Reference meetings.)





The Subject Librarian Advisory Committee (SLAC) replaced their former Collection Development Advisory Council to better reflect the many responsibilities of liaisons. SLAC discusses major policy questions. Patron-driven interlibrary loan acquisition and a redesign of the e-resource access pages are examples of projects covered by this group. SLAC meets quarterly.

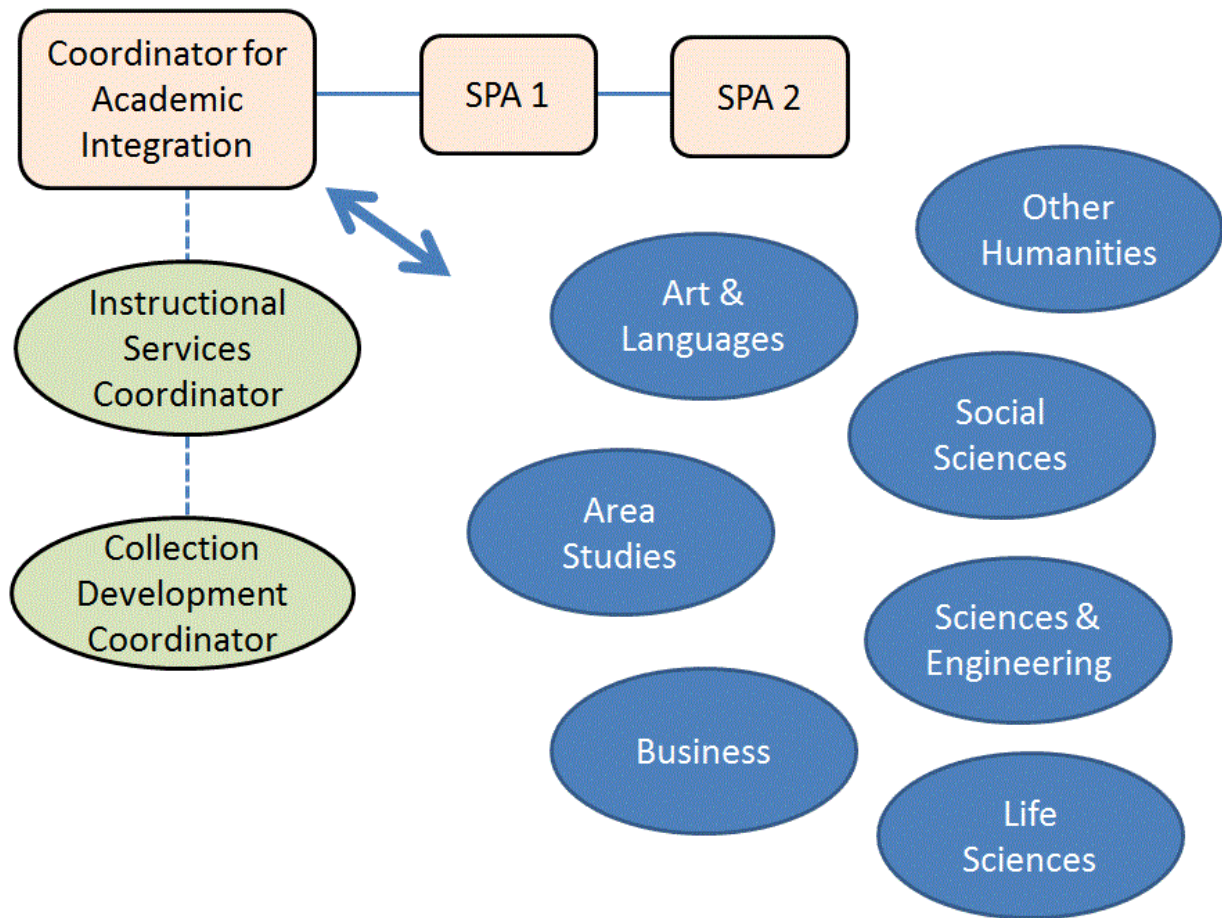


From an email exchange, we learned that Utah State is happy with their new model (including their increased role in collections). However they report that “some uncertainty remains...from the fact that subject librarians report to many different departments so it’s not always clear who evaluates performance in collection development and related roles.” This issue continues.

**Villanova:**

Summary: an “Academic Integration” department that covers instruction, research consulting, collection development, and LibGuides through [seven liaison teams](#), a department head, functional coordinators, and support staff.

(This department was once a traditional reference department; there was also one collection development officer. References services are now covered by the interdepartmental Information & Research Assistance Team. Some members of the Academic Integration department serve on that team.)



Most of the subject teams have 3 or 4 members. Each team has a coordinator. Most academic departments at Villanova still have an identified liaison, as you can see from their [libguides](#).

The functional coordinators work with the department coordinator to set the goals of the department, plan meetings and workshops, and assist each subject team as needed.

According to department coordinator Jutta Seibert, “each liaison team establishes their own work priorities according to expertise and talents available among team members. Liaison teams are accountable for their activities in their individual annual report and in team activities reports.”

She added that the revised department is working well and that “overall we had much positive feedback from faculty for this new model.”

The technical specialists assist the librarians and the subject team with any projects that need support. The department coordinator listed for us the major responsibilities of these two staff positions:

- Scheduling the research support calendar
- Supervising and training student workers
- Collecting usage statistics for journals
- Collecting and entering instruction statistics
- Collecting Web statistics via Google Analytics
- Manipulating research support statistics
- Assisting with marketing initiatives
- Assisting with a large variety of collection development projects from checking holdings in the catalog to pulling books from the shelves; assisting with the evaluation of donations to working on circulation statistics and spreadsheet projects
- Assisting with events such as new faculty orientation, parents fair, etc.
- Archiving documentation on a shared drive
- A small amount of clerical work such as typing address labels and handling print and photocopying jobs

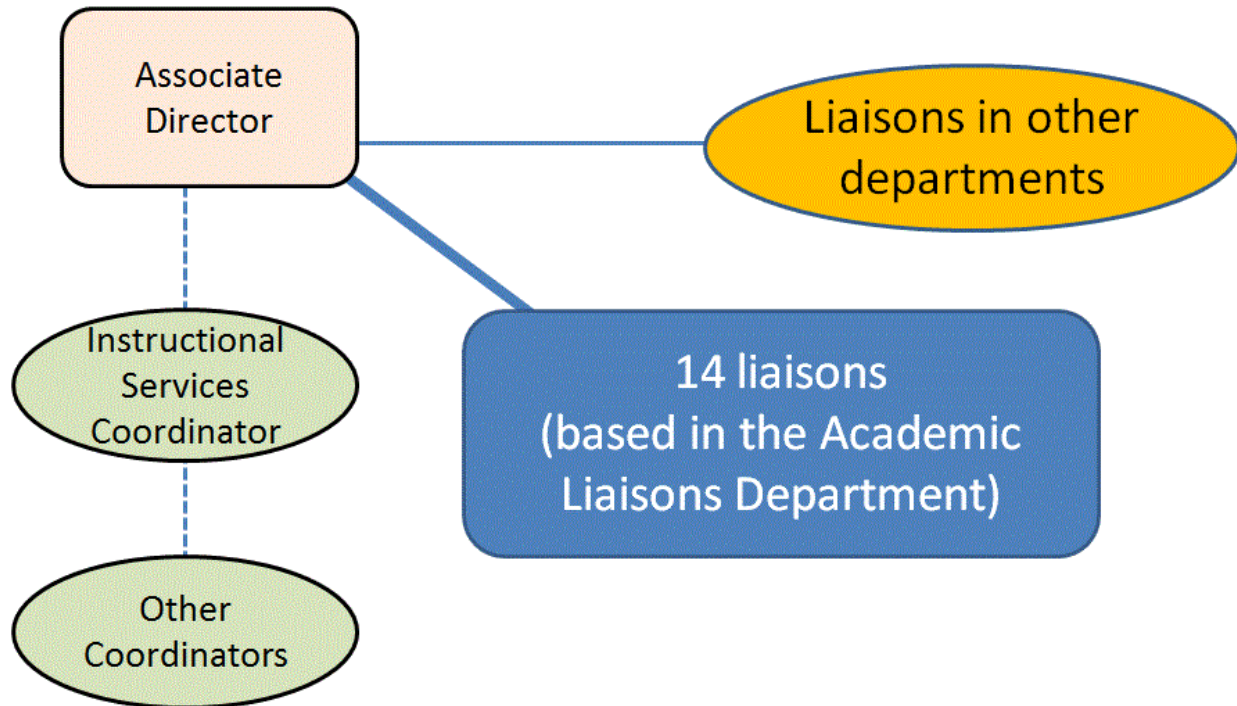
The library has two press releases about the creation of the department:

[Director's Watch column: Recent developments here at Falvey](#) (2006)

[Focus on Falvey's new organizational structure: Academic Integration](#) (2007)

## Johns Hopkins:

Summary: an “Academic Liaisons” department that covers collections, reference services and research consultations, and instruction. Unlike at Villanova, Johns Hopkins does not have subject teams. Like Villanova, the functional coordinators work with department head Margaret Burri (who is also an Associate Dean) on leadership and performance evaluations. (This department used to be the Research Services Department. Many but not all of the liaisons still have reference desk hours, however.)



Oddly, not all of the liaisons are based in this department. Most of the other liaisons are based in the Scholarly Resources and Special Collections (SRSC) Department. However, the SRSC Associate Dean has a close working relationship with the Academic Liaisons (AL) Associate Dean and invites the AL Dean to help write annual evaluations of the SRSC-based liaisons.

The AL department has a monthly meeting on library instruction and a monthly meeting on research support. At the encouragement of the SRSC Dean, most of the liaisons in SRSC participate in those meetings and find them valuable.

The AL department is working on reducing the collections development work load of the liaisons in order to allow the liaisons to focus on public services.

Despite the absence of formal subject teams, the AL Dean told us that “Liaisons are generally allowed to focus on their strengths/what they do best. The library assumes that liaisons will be the most productive with their favorite kind(s) of liaison work. Liaisons really into instruction

usually end up helping with instruction in other academic departments beyond their official liaison areas; likewise liaisons really into collections work. The department does try to evaluate workload and the effectiveness of the core liaison responsibilities, and makes changes to responsibilities in response (an ongoing effort).”

Some peer-assessment is done, ex. with peer review of teaching (the teaching librarian gets to choose who the peer-reviewer is each year). The peer-reviews do not become part of the official annual review.

There are no staff positions in the AL department. “It would be nice to have some”, the Dean reports.

The library also has interdepartmental functional teams based on interest and skills. The Assessment Team is one example.

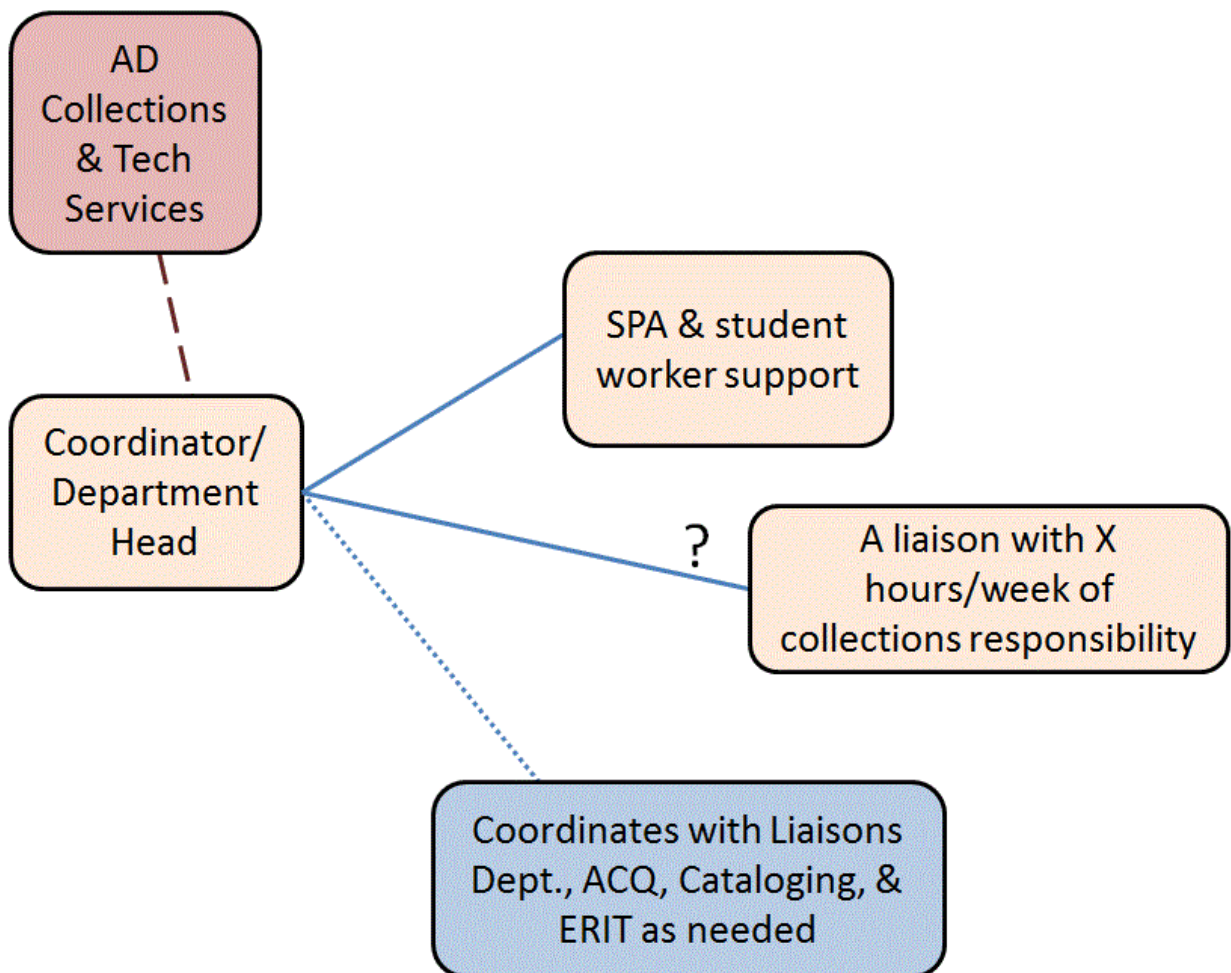
## E. Recommended Organizational Models

1. Collections Department Model
2. Subject Team Model of a Liaisons Department
3. Functional Team Model of an Academic Integration Department

### 1. Collections Department Model

If liaisons will be expected to spend much less time with collections work, then much of that workload will have to be handled elsewhere. A Collections Department– even if small – could relieve the liaisons of that workload. Since most academic libraries have a collections department, we feel this is a conservative recommendation.

Our recommended model for a Collections Department is simple: the Collections Coordinator focuses on collections work and supervises at least one SPA worker, who supervises a student worker. The Coordinator reports to the Assistant Dean for Collections and Technical Services.



Currently the Collections and Scholarly Resources Coordinator position is split between three broad responsibilities: collections, scholarly communication, and History Department liaising. We would like to see this position be focused on collections work, with perhaps the Assistant Dean for Collections and Technical Services assuming leadership of scholarly communication. In many libraries, the scholarly communication and collections are coordinated by two separate positions, reflecting the importance, significant workload, and distinctive skill sets of each area.

If the Collections Coordinator also has a liaison role, that role should be limited to academic departments deemed to receive only limited liaison support. (Below we address the role of “full time liaisons” – those in the proposed liaison department, whose focus as liaisons is on engagement – compared to the “part-time liaisons” – those whose main responsibility is not liaison work (ex. the current liaisons in ERIT) and do not have time to focus on time-consuming engagement activities.)

The proposed SPA position assists the coordinator with routine collections work and special projects. Examples include:

- Developing spreadsheets related to budgets, subscriptions, collections, etc.
- Collecting usage statistics and preparing reports on that data
- Checking holdings in catalogs
- Assisting with title-by-title book selection and maintenance of the approval plan
- Working on weeding projects
- Assisting with promotional initiatives
- Evaluating donations
- Communicating with faculty, liaisons, and vendors
- Supervising and training student workers

For example, much of the so-called “spreadsheet busy work” could be handled by this SPA position. Liaisons would only need to get involved when big decisions need to be made.

Academic departments that primarily receive collections support (not public service support) from the library could perhaps be served by the Collections coordinator and SPA position, instead of the current “part-time” liaisons.

It may be useful for the Collections Department to include a liaison who divides his or her time between the Collections & Liaisons Departments. This liaison could be one with strong interest and skills in collections work who can help both departments with the shift of collections work from one department to the other.

To facilitate the transfer of most collections work from liaisons to this department, perhaps the liaisons should begin keeping track of collections projects they are currently doing. We could review this list in terms of what work needs to be assumed by the Collections Department and

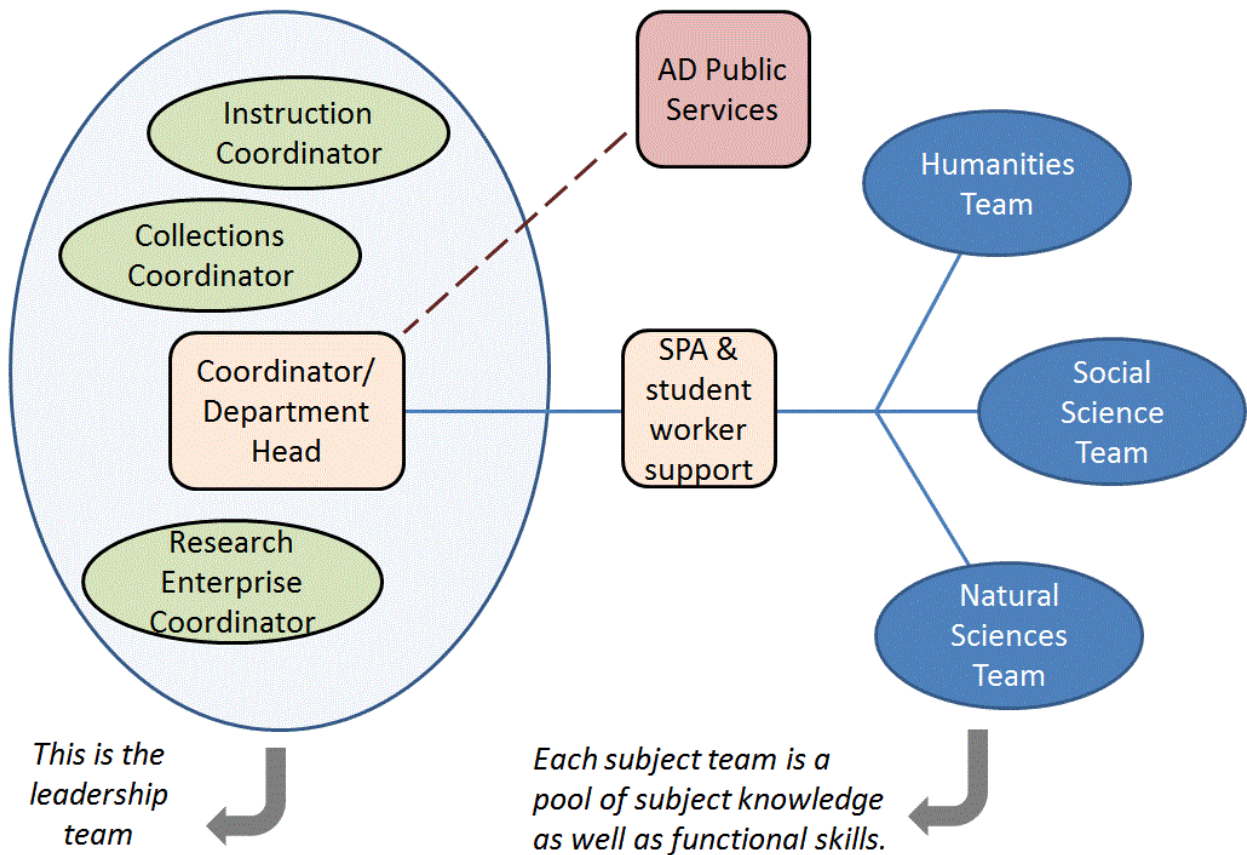


what work can be scaled back or dropped completely. We should also consider services (ex. adding more patron-driven acquisitions aggregators and expanding the approval plan) that might reduce collections workload, and what policies (ex. asking each liaison to consider de-duping print volumes after buying new ejournal backfiles, instead of automatically deciding to de-duplicate superseded holdings) could be changed to likewise reduce workload.

## **2. Subject Team Model of a Liaisons Department**

The Liaisons Department is the home of the “full time” liaisons: those whose core responsibility is public service engagement with academic departments, learning communities, and research centers. The head of the liaison department reports to the AD for Public Services, reflecting the department’s focus on public service. (As we describe this model, we assume a Collections Department exists to allow the full time liaisons to stop doing most of their present collections work.)

The Liaison Department has a leadership team consisting of the department head and functional coordinators. These coordinators provide expertise in core functional activities like instruction and research support, as well as assist the department head with goal-setting and annual evaluations. The functional activities represented by these coordinators become mainstreamed into the work of the department. The coordinators are also liaisons serving in the subject teams. The types of functional coordinators could change over time, reflecting evolving needs and priorities.



The liaisons are organized into subject teams characterized by collaboration and flexibility. Subject teams could include liaison partners (ex. Jenny Dale and Kimberly Lutz covering English together) as well as LIS interns. Within each subject team the liaisons pool their subject knowledge as well as functional expertise. Liaisons work together as needed to meet the library’s engagement goals and the needs of academic departments. (Such teamwork is already happening in the library, if informally.) Teams work together to set teams goals and are held accountable for those goals. Different teams likely end up with different goals, depending on the nature of the academic departments being covered. For example, supporting research enterprise might be a more significant goal for the natural science and social science teams than the humanities team. Individuals still have goals established through their ALFAs.

Here are four possible examples of collaboration with a subject team:

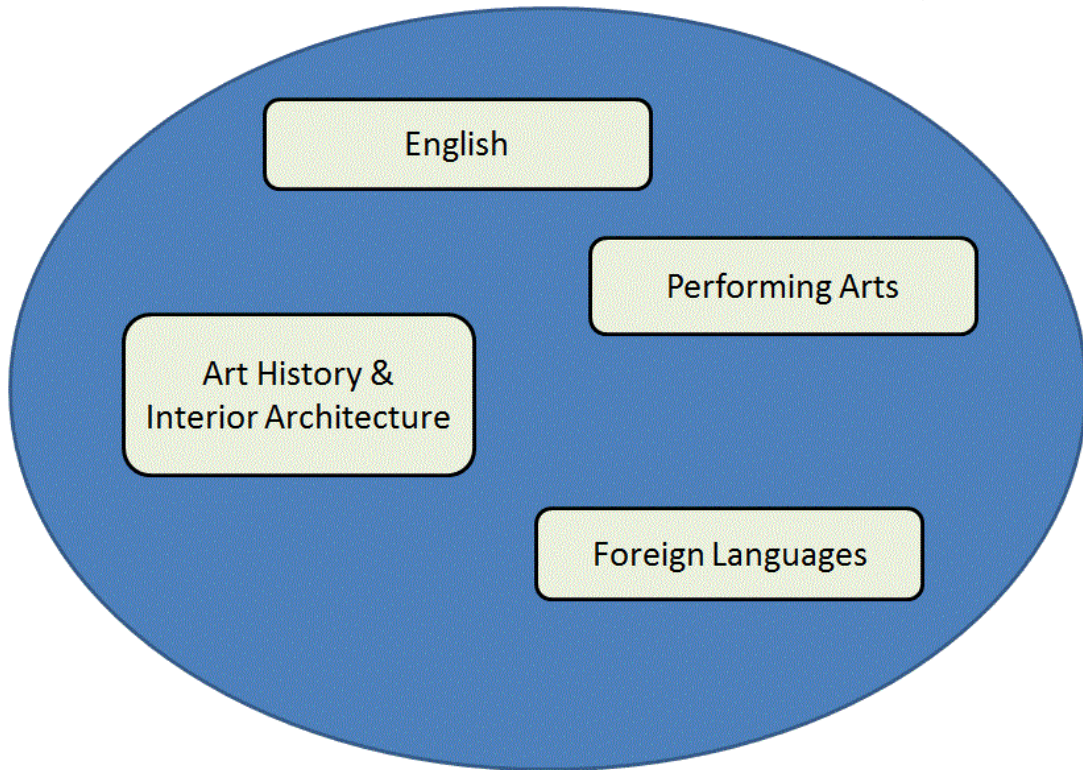
- The library learns that several humanities departments are interested in learning more about the “digital humanities.” The Humanities Team works together to sponsor a forum and discussion on the digital humanities for humanities professors.
- The Social Science Team develops a marketing campaign to promote open journal systems for the social science departments and research centers at UNCG.

- Faculty from several performing arts departments partner with several entrepreneurship professors on a grant project to study and promote arts entrepreneurship in Greensboro. The music, art, and business librarians join the project team to provide research skills and support concerning the arts industry (an example of collaboration across liaison subject teams).
- Four consecutive sections of NUR 210 (i.e. sections meeting back to back) desire a research workshop on a Monday in which the health science librarian will be out of town at a conference. That librarian works with two other members of the Natural Sciences Team to plan those workshops; the other two librarians lead the instruction on that Monday.

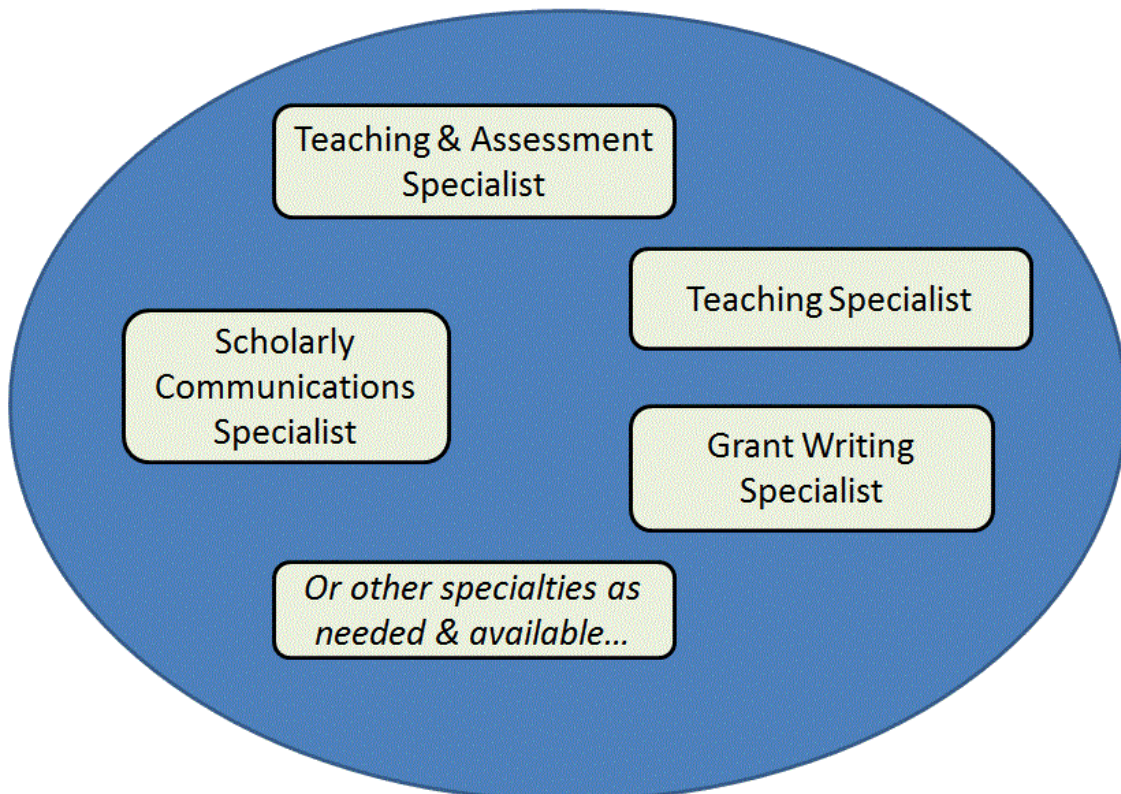
Each subject team has a coordinator who plans occasional subject team meetings and works with the department head on workflow and time load issues. This coordinator role could rotate among the liaisons in the team. Peer evaluations of teammates would be very important.

The subject knowledge, functional skill sets, and preferred liaison activities of the liaisons should be surveyed. Such a survey would help us define the skill sets available in each team, and would help us determine what training or skills development would be most useful to pursue.

View #1 of a subject team: a pool of subject knowledge:



View #2 of the same subject team: a pool of functional specialties:



While liaisons work together in subject teams, each liaison is still assigned target academic departments. Thus the academic departments continue to have one identified liaison in order to facilitate communication and maintain a “human face” of the library.

There are still functional teams among the liaisons. For example, the specialists in instructional technology from each team could get together with the DE coordinator to work on projects that benefit all the liaisons. Such functional teams already exist here.

The SPA position assists the coordinator and the subject teams with their projects. Examples of possible work include:

- Leading library tours, teaching freshmen library instruction classes, and assisting with other teaching activities as needed
- Helping develop instructional technology projects including LibGuides and video tutorials needed by the liaisons
- Developing fliers, posters, brochures, and other publications needed by the liaisons
- Assisting with promotional initiatives like faculty orientation, research fairs, etc.
- Collecting liaison-related statistics and preparing reports
- Scheduling departmental and subject team meetings and workshops
- Supervising and training a student worker.

These proposed Collection and Liaison Departments would not solve the work-load issues currently faced by the full time liaisons. Instead, prioritizing liaison responsibilities and campus units – and encouraging liaisons to say “no” more often based on those priorities – are the actions that can really help with work load. Some campus units (departments, centers, learning communities, etc.) could get more attention and effort than others, based upon their size, need for library resources and instruction, and importance to the university (what the Chancellor’s “Decisions on Academic Program Review” calls “high priority programs”). Instead of a “one size fits all” approach, prioritizing would help the liaisons devote time and energy where they could have the greatest impact. The subject teams could discuss which academic department should get full attention and which should get minimal attention.

The “part-time liaisons” – those whose main responsibility is not liaison work (ex. the current liaisons in ERIT) -- would only liaise with academic departments for which significant public service engagement is not pursued. Those academic departments will only receive limited attention. If the number of full time liaison positions increased, the library could consider providing full liaison support to more academic departments.

Continued encouragement of more liaison partnerships could also help with workload issues. As with Jenny and Kimberly serving the English Department, the partners could divide the liaison responsibilities (ex. public service v. collections) or work out a more nuanced relationship. However, we don’t think there would be enough partners available to cover all the

current liaisons. Prioritizing which academic departments most need a liaison partner might be useful. We could survey all library workers on their subject or functional knowledge and learn of SPA or EPA workers with in-demand academic subject expertise. Then we could consider asking those folks to get involved in some aspect of liaison work.

If the library is able to create more full-time liaison positions, this liaison department could work with Administration on an intentional process to decide what subject and/or functional specialties are most needed. Campus and library strategic goals, public service statistics (or a lack thereof that might indicate the need for a liaison), growth trends in majors, etc. could all be considered in that decision.

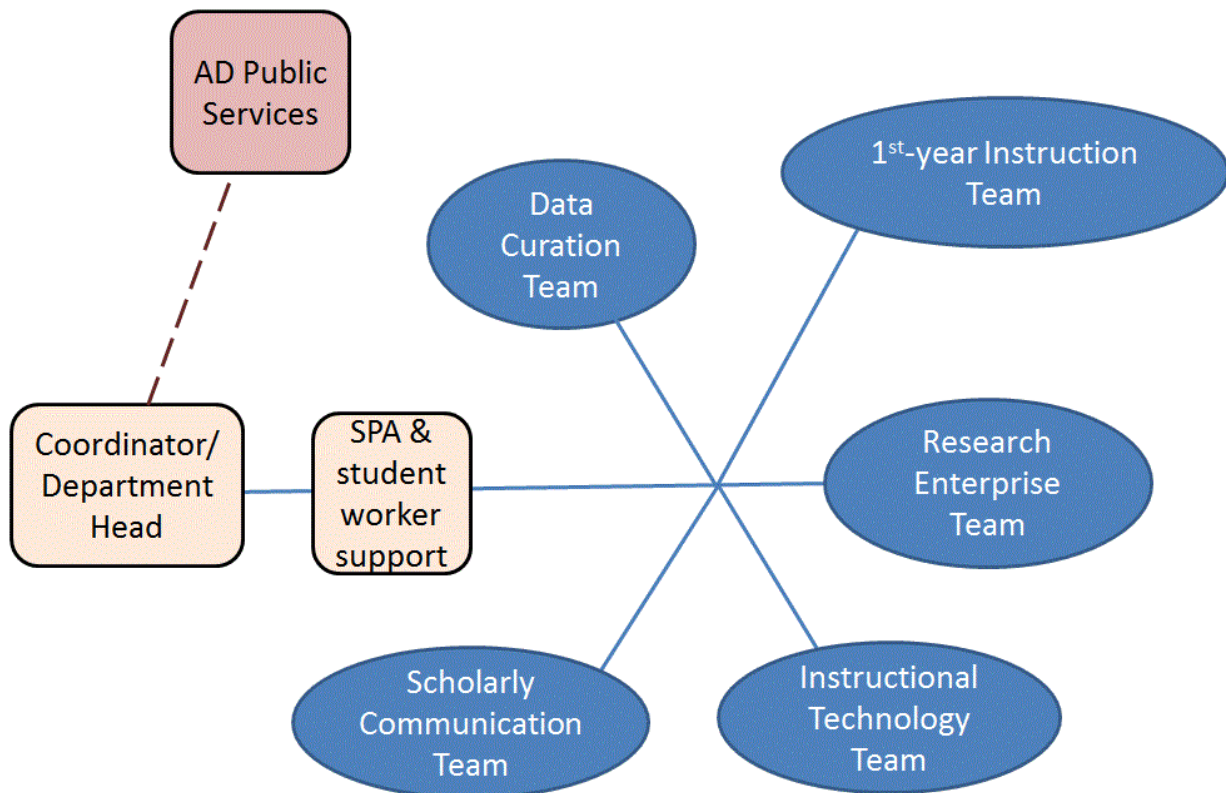
According to our “Major Responsibilities of Liaisons,” general reference service is not a part of liaison duties. Therefore we have not addressed the staffing of the physical and online reference desk here. If we did create a Liaison Department from the existing Reference & Instructional Services department, we assume an interdepartmental team would staff reference services, with referrals made to liaisons as needed.

It might be useful at this point to review the “Strengths and Weaknesses of our Current Liaison Organizational Model” and consider how this Liaison Department model might preserve the current strengths while eliminating many of the weaknesses.

### 3. Functional Team Model of an Academic Engagement Department

This alternative model was inspired by the library at the University of Guelph. After losing 12 of its 34 positions in a crisis involving structural deficits, this library moved from a liaison service model to a [team service model](http://www.lib.uoguelph.ca/about/components/documents/organizational_renewal_2009.pdf) (more details at [http://www.lib.uoguelph.ca/about/components/documents/organizational\\_renewal\\_2009.pdf](http://www.lib.uoguelph.ca/about/components/documents/organizational_renewal_2009.pdf) ).

In this functional team model, liaisons become functional specialists that serve any academic department, research center, etc. needing their specialized support. Here are examples of possible functional teams:



The teams could change over time, reflecting the evolving priorities of the library and needs of the campus. For example, if the library makes data curation a top priority, a team could be formed to focus on that function. (A team serving a lower-priority function should probably be retired to compensate for the new team.)

In this model academic departments no longer have a decided library “face”. Instead the academic departments are directed to the team coordinator appropriate to their functional needs. Some of the teams would probably have reason to collaborate (ex. a 1<sup>st</sup>-Year Instruction Team and an Instructional Technology Team); other teams would have less reason to interact with others. While some librarians might serve on multiple teams, most librarians focus on one functional area.

The librarians would be able to leverage a core skill set, rather than be expected to have many skill sets. A strong emphasis on functional skills would have to be made in hiring decisions. Strong support of training opportunities to develop functional skills would be vital.

As with the subject team organizational model, a staff position would support the work of the functional teams.



## F. Appendix 1: Recent Evolution of Collection Development at UNCG

### To 1990

- Many allocation and policy decisions were made by the university-level Library Committee with little input from individual librarians. There were no formal policies on overall collection management and no one particular person was in charge.
- Each academic department or unit had a faculty member assigned as the Library Representative, who made almost all the spending decisions on firm orders.
- Annual allocations were seldom altered despite curricular changes. Allocations were based on tradition rather than data and actual need.
- There were no library subject specialists, although some librarians did have informal assignments to academic departments, especially for library instruction.
- At some point librarians prepared a 1-2 page collection development statement for each department summarizing the types of resources (academic level, geographic coverage, language, etc.) needed. Not much was ever done with these statements.

### 1990-2000

- In 1990 Dr. Robert Galbreath was hired as the Assistant Director for Collection Management.
- The Assistant Director began the Liaison program, in which each academic department was assigned a librarian. The liaisons group included all the Reference librarians, the Assistant Director, and four librarians from other departments.
- The Collections Management Committee was formed by January 1991.
- Extensive training sessions were held covering every aspect of library operations that pertain to liaison work: acquisitions (serials, budgets, approval plans, book order processing, etc.), cataloging, circulation services, special collections, reference, and library instruction.
- Numerous documents were prepared that outlined responsibilities and made suggestions for best practices such as helping departments decide on the appropriate balance between books and journals.
- Faculty were still primarily responsible for spending firm order allocations but could request help from a liaison.
- Liaisons prepared reports for program reviews or reaccreditation.
- In 1994 the Assistant Director proposed a restructured CMC in which a core representative group met monthly while the entire group met quarterly. This approach proved problematic for discussions that required the entire group, and was eventually scrapped in favor of full monthly CMC meetings.
- Reference Librarian Nancy Ryckman was given a quarter-time appointment to Collection Management to assist the Assistant Director with meetings, report preparation, and planning receptions for Library Representatives and liaisons.
- Approval plans were established to cover mainly university press books. Because many department allocations were not being spent, the approval plans were significantly expanded by the mid-1990s, especially for the social sciences.

- Liaisons identified continuations that were grouped according to how often the library would order a new edition: every one, two, three or four years. Serials published irregularly were also identified. Acquisitions maintained the lists.
- Major serials cancellation and/or review projects were done at least twice. One major review of the collections took place over multiple years in preparation for moving thousands of volumes to the Ferguson storage facility in 1999.
- Serials reviews were planned to be ongoing, i.e., the first year the humanities would be reviewed, the second year the social sciences, then the third year the sciences. This never happened on a consistent basis.
- Librarians and faculty began using a “New Periodicals Request” form to request new subscriptions. The Serials Screening Subcommittee (SSC) reviewed all requests. The SSC was disbanded during the 1999-2000 academic year.
- Biennial meetings were held for Library Representatives to review the role of Representatives and Liaisons, discuss the overall budget, review the book and journal order process, promote new resources, and highlight the library’s services to faculty and students. Liaisons were expected to attend the meetings if possible.
- Library Representatives were requested to complete an annual “Statement of Needs” to help the library determine whether resources and services had been sufficient and what resources and services were needed for the following year. The Liaison used this information to recommend budget changes.
- ERIT formed with the hiring of Tim Bucknall in 1994.
- NC LIVE came online with a package of databases that helped UNCG expand its database offerings.
- With the hiring of Gerald Holmes and the creation of his faculty line as reference librarian in 1998, the number of library positions that focus on liaison work reached its peak.

## **2001-2005**

- Dr. Galbreath resigned around 2000 and was succeeded a year later by Dr. Ken Slagle.
- Upon his departure Dr. Galbreath had left extensive notes, policies, procedural documents, reports, etc. both in print and online. Most of these documents were lost by 2005.
- Periodically liaisons met with YBP to edit the approval plan to bring in not only a larger quantity of books but also more relevant books. Some differential pricing for the approval plan books was initiated to help balance the number of books being acquired for each department.
- Beginning in 2003, we subscribed to many “Big Deal” serial packages. We gained access to many more journals, some of which proved to be more popular than journals we had previously selected individually. Cancelling individual subscriptions was not always possible, which limited our choices when dealing with the major budget cuts after 2010.
- UNCG organized the Carolina Consortium to help libraries achieve better deals on serial packages, databases, and ebooks. Several UNCG librarians devote significant time to the consortium every year.
- The Electronic Resources Selection (ERS) committee was formed to make final decisions on database subscriptions funded by the XDDBS budget.

- The library begins to receive Distance Education money, some of which is used to purchase electronic subscriptions.
- In 2004 Dr. Slagle left the library.
- In 2005, Dr. Sha-Li Zhang was hired as our Assistant Dean for Collections and Technical Services, an expanded job title and role for this position.
- The number of UNCG students and faculty grew at a significant rate through the 2000's. Many new degree programs, including PhD programs, are created. In 2006 UNCG received the Carnegie classification of "research university with high research activity".
- However, the number of librarians whose positions center on liaison work remained the same.

## **2006-2010**

- In 2006 Dr. Stephen Dew was hired as our first Collections and Scholarly Resources Coordinator. The coordinator reports to the Assistant Dean for Collections and Technical Services. The coordinator does not have any budgetary control. About one-third of the time of the position is devoted to collection projects, one-third to scholarly communication projects and issues, and the remaining third to liaison work for History plus scholarly, creative, and service activities. In 2011, the coordinator began supervising the Assistant NC DOCKS Coordinator, a halftime LIS graduate student position.
- Liaisons are charged with promoting open access journals and submitting articles to NC DOCKS.
- Usage data (including cost per use) is increasingly used to help make decisions on electronic subscriptions and space usage.
- Liaisons identified many journals to move from print to online only. Duplication of formats (print and online for the same title) was phased out as much as possible.
- In 2008 we began providing computer science ebooks using the patron driven acquisition (PDA) model. The next year we added PDA for ebooks in business, economics, and health science. By 2011, all UNCG subject areas were covered with PDA. But liaisons and faculty continue to select print books and ebooks through firm orders and the approval plan as well.
- Significant revisions of the Approval Plans continue.
- In 2009 Gerald Holmes moves to Library Administration, reducing the number of liaison-centered positions. However, additional librarians with major responsibilities in other areas (ex. Administration and ERIT) become liaisons.
- Large and time-consuming weeding projects were conducted involving government documents, microfilm, monographs, and serials in Jackson Library and remote storage. The successful goal was to create space in the basement for the Digital Media Commons.
- The Electronic Resources Librarian identified electronic journal backfiles to be purchased so big collections of print journals could be weeded.
- Liaisons spend more time evaluating different electronic resources than in the past, given the increasing number of titles available, and the need to make cancellation decisions due to budget cuts.

## Since 2010

- Yankee stopped providing paper slips for new books and switched to emailed “Gobi Alerts.” We also stopped subscribing to *Choice* slips.
- Large budget cuts several years in a row required the liaisons to spend significant time identifying serial and database subscriptions to be cut. We began to drop out of “Big Deal” packages. Liaisons had to communicate with faculty about those cuts. Cuts to NC LIVE also impacted our own database spending, requiring even more UNCG database cuts.
- Firm order budgets were also cut, but the resulting departmental budgets varied widely, emphasizing how the allocations could not be justified in any logical manner. CMC formed a subcommittee to base department book spending on circulation and the number of students and faculty.
- We evaluated and purchased many large ebook collections using a large amount of one-time money we had to spend quickly.
- Task forces on pay per view and ebooks were formed and provided reports to the Collections Management Committee.

## G. Appendix 2: Resources on Prioritizing Liaison Responsibilities

If we do create a centralized “Liaisons Department” with clear leadership and an emphasis on public service, it might be useful for us to write and endorse a statement of prioritized responsibilities. The University of Minnesota created a “Librarian Position Description Framework” in 2009 that has served as a model for other libraries (ex. Duke and the University of Washington) redefining the role of their liaisons. Duke’s report seems the most useful.

**Minnesota:** Librarian Position Description Framework

[http://wiki.lib.umn.edu/wupl/AP.HomePage/Librarian\\_Position\\_Description\\_Framework.doc](http://wiki.lib.umn.edu/wupl/AP.HomePage/Librarian_Position_Description_Framework.doc)

(Also regarding Minnesota: A Framework for Articulating New Library Roles:

<http://www.arl.org/bm~doc/rli-265-williams.pdf>)

**Duke:** Engaging with Library Users: Sharpening our Vision as Subject Librarians for the Duke University Libraries (prepared by the Task Force on Subject Librarian Re-visioning)

<http://library.duke.edu/about/planning/2010-2012/subject-librarian-report-2011.pdf>

**Washington:** Subject Librarian Position Description Framework:

<http://staffweb.lib.washington.edu/units/cms/sl-portal/knowning/position-description-framework>

Finally, **Kansas** produced a task force report titled “Connecting to KU Teaching & Research Departments “in 2010 that provided “high-level set of recommendations” regarding the library’s engagement with the campus. As part of Kansas’ continued transition from “collection-centered” to “engagement-centered” models, the report provided broad recommendations regarding examining service gaps, prioritizing liaison responsibilities, and establishing core competencies.

<http://tinyurl.com/9she33v>

## H. Appendix 3: Most Relevant Articles for Benchmarking

We couldn't find any articles directly addressing innovative liaison models. Some articles discussed the changing roles of the subject specialist in collections work; a few discussed the results of liaison partnerships. These three recent articles proved most relevant to the task force's charge.

Malenfant, K. J. (2010). Leading Change in the System of Scholarly Communication: A Case Study of Engaging Liaison Librarians for Outreach to Faculty. *College & Research Libraries*, 71(1), 63-76.

**Abstract:** This narrative, single-case study examines how liaison librarians at the University of Minnesota (UMN) came to include advocating for reform of the scholarly communication system among their core responsibilities. While other libraries may hire a coordinator or rely on a committee to undertake outreach programs, UMN has defined baseline expertise in scholarly communication for all librarians who serve as liaisons to disciplinary faculty members. By “mainstreaming” scholarly communication duties, UMN is declaring these issues central to the profession.<sup>1</sup> This intrinsic study uses evidence gathered from open-ended interviews with three participants, supplemented by documentation. It explores the context of these changes, systems thinking, and new mental models.

**Quotes:** “[Karen Williams, the first Associate University Librarian for Academic Programs] was recruited to lead a new library division, academic programs, to create close ties to academic life on campus, integrate library resources within academic programs, and contribute to the intellectual and educational missions of the university.”

“Arriving at the UMN Libraries in November 2004 from the UA Library, Williams encountered two different and very strong reactions from library staff members—“Thank God; we need to shake things up” and “We don't want any part of that” (“that” being team-based organization development and systems thinking).”

“When positions change, people feel they are being asked to take on more. Here, liaisons are explicitly expected to stop doing things in the areas of collection development, reference desk staffing, and departmental libraries. Liaisons must redirect scarce resources—their time—with inherent political implications.”

**Notes:** An interesting case study of change management, specifically changing the priorities and (to some extent) the organizational culture of liaisons.

Nesdill, D., Love, A., & Hunt, M. (2010). From Subject Selectors to College and Interdisciplinary Teams. *Science & Technology Libraries*, 29(4), 307-314.

**Abstract:** In addition to enduring a recent renovation, the staff of the J. Willard Marriott Library underwent reorganization. This was a response to the changing digital landscape, reduction in budget, and student requests for one central space to go to, to obtain technology and reference assistance. In the Public Services Department the subject departments were reorganized into task-oriented departments. The traditional outreach and collection development duties of subject librarians were addressed by the development of a second layer of organization, the college and interdisciplinary teams. This article addresses reorganization of the Public Services Department in general and the response of the science and engineering personnel specifically.

**Quotes:** “The teams formed include librarians and staff from outside of public service, e.g., Collection Development Technical Services and Special Collections, to foster collaborations across the divisions of the library. Six CITs [College and Interdisciplinary Teams] have been established; Science, Health, Engineering, & Mines (SHEM); Social Sciences, Education, Business, & Social Work (SEBS); Fine Arts, Architecture + Planning, & Humanities (FAAPH); Documents & Maps (DOCMAPS); Multimedia (MEDIA); and International & Interdisciplinary (INTER). Library administration appointed a team leader for each CIT, to serve a three-year term.”

“In addition to the work assigned in these task-oriented departments, each team member is expected to devote time in fulfilling the mission of Research and Information Services; i.e., former responsibilities were not eliminated, but new responsibilities were added. Juggling time between meeting the objectives of two organizational structures in addition to former responsibilities is a problem.” [Hardly surprising. –SC]

“Teamwork addressing CIT responsibilities is emerging, but library administration is still calling for “ambassadors” to university departments. Discussions are currently underway as to whether an ambassador to each college with team backup would be appropriate.”

**Notes:** A creative attempt at organizing the subject selectors, even if the focus is on collections. But this example illustrates the need to recognize and take action on work load issues as responsibilities keep increasing.

Sargent, A. R., Becker, B. W., & Klingberg, S. (2011). Incorporating Library School Interns on Academic Library Subject Teams. *Journal Of Academic Librarianship*, 37(1), 28-33.

**Abstract:** This case study analyzes the use of library school interns on subject-based teams for the social sciences, humanities, and sciences in the San José State University Library. Interns worked closely with team librarians on reference, collection development/management, and instruction activities. In a structured focus group, interns reported that the internship enhanced their professional and career development, but they desired greater feedback and mentoring than they received. The library gained staff for its

large instruction program and successfully recruited talented former interns for professional openings. This analysis will help other libraries and library science schools to improve their internships and field experiences.

**Quote:** “In fall 2007, SJSU librarians responsible for subject reference, library instruction, and collections were reorganized from a single large department into four subject teams: humanities, social sciences, sciences, and professional schools. The non-professional staff members that supported the original department were not re-assigned to teams, resulting in a lack of skilled support for librarians' responsibilities. This staffing gap was one motivation for the new subject teams to recruit interns, although librarians have been careful to assign only professional-level activities to them.”

“To date, interns on teams have primarily worked in these areas: course-related library instruction (one-shot instruction sessions), self-paced library skills modules, and collection development/management projects. Librarians provided group training for interns who would be teaching.”

“In a difficult period of shrinking library resources and large student enrollments, the interns are making an important contribution to the instruction program.”

**Notes:** A win-win situation for busy liaisons needing support to accomplish their goals, and for library students to get professional experience.