The Liaison System

The University Libraries have operated for a number of years with a liaison system as a critical communication path between the library and the faculty in academic units (hereafter LS). The point of contact envisioned in the LS is between library faculty with duties in reference, collection building and instruction (hereafter library liaisons or LLs) who are assigned liaison duties to particular academic units, and liaisons selected by the academic unit (hereafter departmental liaisons or DLs) to be their contact.

During the 2004-2005 academic year the ULC heard from deans of four colleges. In the Fall 2005 the ULC worked to draft a series of issues that it wished to consider as a long term agenda. These issues were suggested by the deans’ visits or came to the ULC from the dean of libraries or the provost. In reviewing that list, the council recognized that many of these issues turned on the efficiency and quality of current communication between the library and its campus users. Since the LS was so pivotal to the library’s approach to this communication, the council identified review of the LS as a priority project.

Project Structure

The objective of this project was to gather preliminary indications of the activities currently characterizing the liaison system and to identify some best practices that might be provided to those currently working in the system.

The current roster of LLs and DLs was parsed among the councilors. The resulting lists were balanced so that each councilor had the opportunity to talk to LLs and DLs in a number of different disciplines across the university, including at least one LL/DL pair. Councilors were asked to interview some of the LLs and some of the DLs on their lists to learn the current operation of the system and possible best practices in preparation for a discussion of the system on March 3, 2006. The objective was not to interview all personnel involved in the system and then to generalize to the current practices, but rather to interview sufficient personnel to participate in a conversation with the objective of identifying issues for the library to pursue. A suggested protocol was developed for LLs (Appendix A) and DLs (Appendix B) although the protocol was merely a guideline to the councilors.

Councilors conducted interviews during February 2006. Based on these interviews the discussion ensued at the ULC’s early March meeting. Issues were identified during that discussion and formulated into this report.
ULC Report on the Liaison System

Overriding Conclusions.

General agreement emerged on two conclusions that framed our understanding of the current LS’s operation. First, the Council noted a wide variety of different experiences across campus. Some of these differences are due, no doubt, to the differences in the academic disciplines and their needs. But in addition, there are many differences explained by different people working in individual ways within the system. It is possible the people-dependence is a strength of the system: those within are adapting to exigencies as they arise thus forming unique relationships. It is also possible, however, that this is a weakness of the system: the quality of current operations is dependent on the personnel involved. In other words, the system itself may be contributing little to the quality of the relationships between the libraries and the academic units; success is in spite of rather than because of system structure.

The second framing conclusion is the widespread sense that the resources of the LLs are spread extremely thin. In talking to them and their DLs, we heard reports of extraordinary effort and laments about what they do not have the time to do. This constraint likely means that changes in the system that merely give additional duties or responsibilities to the LLs are unlikely to succeed. In addition, it is likely that any improvements should include an examination and perhaps training in the structure of priority decisions among the important tasks that fall to LLs. If the University Libraries decide that a greater range of responsibilities should fall to the LLs, additional resources probably are required in the system. For example, several of the best practices we identify require additional devotion of time by LLs to the ongoing activities in their associated academic units. If such practices are to be encouraged without additional personnel or altered priorities, there will probably be little hope of generating the time such a best practice will require.

General Conclusions

Before exploring particular aspects of the system, there are general conclusions that emerged from the councilors’ interviews:

- Satisfaction with the current LS is widely expressed by those working within it. Unclear is whether this satisfaction maps to the library’s expectations for the LS. As we shall comment later, many LLs and DLs perceive the LS’s goals narrowly focused toward specific operational tasks. The satisfaction may, therefore, respond to the smoothness with which the system seems to satisfy those operational needs.

- The LS functions best on narrowly defined, routine, operational tasks. Examples are the journal review process, requests for monographs, accreditation reviews, and basic classroom instruction. Evidence of the system functioning to provide more general contact between academic units and the library is uneven.
The LS often functions at a high level, particularly on specific operational tasks, because of the practical wisdom of the LLs. When LLs experience problems with a DL, they generally figure out a work-around. Much information passes to LLs from a broader range of clients than just the DL.

DLs speak with great respect and affection for their LLs. This seems appropriate. The details of LL activities reported by DLs indicates that LLs provide important services, particularly in the area of library instruction and responding to specific requests from faculty. The prompt and friendly approach of LLs is acknowledged and appreciated by DLs.

Less respect and affection goes the other direction. This also seems widely deserved. The quality of DLs varies greatly. LLs report recognizing this disparity and working with it through various work-arounds. Sometimes they identify other unit administrators for contact. At other times, LLs simply contact as many faculty as they can.

The DLs cannot realistically be considered part of an ongoing system. There are “good” DLs but this seems to be more a function of their affection for the library and/or their long tenure as a DL than through any organization or training on the part of the library. We elaborate below on the state of the DLs.

Defining Expectations for those in the liaison system

LLs readily recognize three expectations of their contact with their academic units: reference, instruction, and collection building. In its section on “Liaisons,” the library’s “Best Practices for Collection Managers” webpage suggests a fourth expectation: “developing relationships between the University Libraries and academic departments.” This fourth expectation is elaborated as a general line of communication between library and academic unit in which new services are presented and “transparency grounded in mutual respect, shared understanding, and awareness of the challenges and opportunities inherent in simultaneously serving narrowly defined specialized areas of academic creativity and more generalized areas of pursuit within the university community.”

LLs readily understand and cite the first three of these expectations. Perhaps the thoroughness with which they understand is reflected in the fact that even when they do not perform all three well, they manifest anxiety – indeed, articulate guilt – over failing to do so.

LLs see these first three expectations as somewhat distinct and portray them as requiring a broad range of skills. Although they orient to these three expectations, LLs do not always feel equally competent in these three areas, nor do they feel that they always have
time to perform all three well. The result is often a priority focus on those functions that each LL does best.

- LLs are less likely to articulate, and when doing so articulate less clearly, the fourth expectation. Although library administrators often speak of the LS as the eyes, ears, and voice of the library in working with academic units on a broad range of communication, LLs do not as readily articulate a broader responsibility than the first three expectations. Furthermore, evidence that this function occurs as part of general everyday practice varies.

DLs generally have no readily identified expectations for their role except to respond to specific requests from their LL. The grasp on the DLs responsibilities probably varies by experience and thus is probably acquired through experience. DLs report no definition of expectations communicated to them by the library except through their LL, and typically those expectations are defined in terms of specific operational responses.

The Liaison System as a General Mode of Communication between the Library and Faculty

Given the focus on the LS as a key communicative avenue between the library and its stakeholders in the academic units, specific examination of this function seems wise. There is sufficient evidence to indicate that as a broad communication channel between the library and the faculty, and the faculty and the library, the LS is not fully functional. Some more specific impressions, however, emerge regarding the fulfillment of this expectation.

- Although LLs readily recognize the first three expectations as part of their job, they are less likely to articulate a responsibility as a broader two-way avenue of communication to the faculty. Their conceptualization of the first three expectations is most often transactional and usually reactive – tied to specific tasks and contacts. Achieving a “surveillance scan” role would require not only adding the expectation to the formal statement of responsibilities but seeing the expectations in more general terms than the current specificity.

- Reports of the LS working well focus on this transactional level, where a specific task has been given to the LL and specific questions asked of the DL. Examples are journal review or accreditation review. Many LLs are task oriented and relate to their DLs best with specific tasks.

- Some LLs are so involved in their departments that they are an excellent source of knowledge about their assigned discipline(s). Some regularly attend meetings of the faculty in the academic unit. Some attend research presentations. Some attend orientations and other opportunities to meet and greet their clients. Indeed, for some the
contact extends to social gatherings in which academic units build esprit de corps. This breadth of contact is not, however, universal. LLs often report their workload as sufficiently demanding that investing time in a greater bond with their departments beyond task-contact is not feasible.

- There is some evidence that LLs do not believe that information they pass through to library administrators will have effect. Library administrators say that it does, in fact, have effect. Although we cannot assess which perception is correct, the disparity probably serves to interfere with the fulfillment of the expectation of an open communication channel between the library and the academic units.

Another way of perceiving the range of expectations of the LS is:

1. operational tasks – day to day requirements for managing the library and its collection; collection management, providing reference, teaching basic skills;

2. marketing tasks – introducing new library products, instruction on library technologies, having supporters appreciate library problems, promoting the library to stakeholders; and

3. public relations tasks – the broader, on-going, two-way, relationship with the library’s key stakeholders in the academic units. In the words of the “Best Practices” webpage, these tasks serve “to promote transparency grounded in mutual respect [and] shared understanding.” This task includes the sharing of goals, expectations and visions originating in the units and in the library; identifying trends in departments and disciplines; sensing difficulties in library use; informing stakeholders of library priorities, successes, and needs.

With regard to this way of understanding the LS’s functioning:

- Interviewees reported that the system functions reasonably well on the operational tasks. LLs are committed to these tasks, find the DLs (or some workaround) cooperative, and both LLs and DLs are generally contented with this level of work.

- Success on the other two currently turns on the individual practices of the LLs. Some marketing occurs within the context of library instruction, but here it connects with students more than faculty. Beyond instruction and obvious reference opportunities, little marketing of new products and services is reported in the LS, even after some prompting to help recall such activity.

- Those liaisons with more thorough ongoing relationships with their departments probably better perform the public relations tasks. Yet, reports of passing perceptions gained from the environmental scan that is inherent in that task into the library system do not readily surface as LLs talk about their activities. It is possible such reports are a part of the
background interactions of LLs with other library administrators, but if so there is little recognition of the value or even the occurrence of this communication channel.

The Departmental Liaison Half of the System

As we reported earlier, the library cannot be said to have a DL system. Several signs (or lack of signs) indicate the truth of this statement:

- Incredibly, the library keeps no up-to-date roster of DLs. Even after obtaining an updated list, one of the members of the ULC who also serves as a DL was not listed as his unit’s DL. Another who was listed as a DL reported no contact from his LL on the recently completed journal priority project.

- Although faculty members can find the name of their LL on a library website (if they recognize or know to search on the term “Librarian Subject Specialists”), the library does not identify DLs on that disciplinary list nor on any other list on their website. Thus, identification of one’s DL generally depends on the communicative efficiency of the faculty member’s academic unit.

- No one seems to know of the existence of a list of expectations for DLs.

- No DLs reported a systematic orientation provided for new DLs except as it is provided on an ad hoc individual basis by their LL.

- Nor is there evidence of the availability of training of DLs to better fulfill their responsibilities except ad hoc as needed on a particular task.

- No meetings of DLs to discuss general problems or developments were reported by any DL or LL. The current LS relies on DLs isolated in their academic unit without awareness of problems they may share with other DLs, library problems their unit may share with other disciplines, approaches to library resources that may work for others, or perhaps most important, the changing nature of the library as an academic resource.

From our contact with DLs and from the reports of LLs, it seems evident that the quality of DLs varies significantly. LLs generally seem aware of the uneven quality of DLs. They report bypassing weak DLs, going directly to the faculty or the chair. Although this creative work with the system’s weakness is itself laudable, it also indicates a systemic problem with the DL portion of the system.

- This variance in quality may very well relate to the attitude toward the system established by academic unit administrators. We heard stories of young faculty members assigned
the task as a “service duty” by their appointing-officers who disparaged the job or minimized its importance.

• No one reports efforts by the library to work with academic unit administrators to upgrade, or even evaluate, the DL portion of the LS. The initiative to resolve problems seems to reach no further than an occasional request that a liaison be appointed, arriving at the busiest time of the year.

• There certainly are effective DLs. These are singled out readily by LLs, and we found them in talking to DLs. The quality seems, however, to emerge more from their passion for the library than from the structure of the LS or their preparation as DLs.

Perhaps most startling to us, at a time when the library seeks support for the changes that are occurring in the nature of the library’s services and relationship to campus, the LS does not seem to be seen as providing such a support system. It seems evident that a well organized, supported, and actively engaged group of DLs meeting regularly if only occasionally to address problems and changes have the potential to serve as a body of support for the library’s needs and causes within the faculty. The vision articulated on the library’s “Best Practices for Collection Managers” webpage, if engaged by a broader range of Library personnel has a potential to generate greater understanding and support for the library among faculty. Today, the LS has no such potential.

**Best Practices**

One of our objectives in this exercise was to identify some best practices within the LS. We offer these in the true spirit of best practices, not as minimum standards but to encourage those within the system to rethink their approaches to their tasks through seeing the success of others. The following practices are either proving their worth to effective liaison relationships or were strongly recommended by those in the system.

• LLs with greater contact with their departments tend to bond more thoroughly with their units and build firmer relationships between the library and the departments. Some LLs attend departmental academic events on a regular basis. Some LLs are introduced to potential faculty, to new graduate students, as a matter of course. Some LLs even attend social-bonding events in the department. Although we hasten to add that this best practice should be read in light of the resource and priority issue indicated above, LLs may wish to consider the ways in which such contact facilitates their activities and the library may wish to evaluate strategies to direct resources and priorities to such practice.

• LLs with greater intellectual investment in their departments provide greater liaison. Although we know that the libraries hire LLs with their academic knowledge in mind, we encourage a greater effort to match each LL’s interests to the academic units they serve.
The communication between the LLs and the departments generally seem to be of higher quality when there are as many opportunities as possible for communication. For example, LLs should be on the listservs of departments. When practical, LLs should be permitted to communicate directly to the departments through departmental listservs. Techniques for communicating with faculty, graduate students, and even undergraduate students are available in each department and can be of great assistance to the LL.

Although the state of the DLs is such that there are few best practices to report, one frequent suggestion is that DLs should be appointed for longer than one year. A long-term relationship will advance the liaison role in departments and permit the development of a better systemic approach to the DLs.

Recommendations

1. **A basic and critical review of the purposes and strategy of the liaison system.** We recommend a basic and thorough review of the library’s approach to the LS. The current state of one half of the LS, the DLs, seems so needy that the library ought begin this review by asking if the LS is worth saving. Is an “hourglass” shaped system, in which the vision of a narrow LL-DL relationship is at the heart of its functioning, a satisfactory model for the relationship between the library and the academic units?

   Importantly, we recommend that the library reach out to academic units as a part of this discussion. Although, that conversation should identify the needs of the departments addressed by the libraries, we believe that this conversation should be much more a dialogue than simply a solicitation of needs. In the current state of the LS, we believe a mere solicitation of needs has a dangerous potential to duplicate the problems with the current LS rather than addressing them. In short, this conversation should be a first step in helping the academic units re-envision their relationship to the library.

2. **A strategic plan to develop the departmental liaison system.** If the current system is endorsed, we believe in the need for a plan involving a considerable effort over a period of time to breathe life into the DL portion of the LS. To succeed in this task, the library will have to designate responsibilities and resources at the administrative level toward invigorating the system. Simply charging the LLs with this task is not only unrealistic, but because they are assigned to specific disciplines such a strategy could not achieve the type of integrative quality that a good system would include.

   Of particular importance is the process by which DLs are identified and developed. The plan should include work with academic unit administrators to provide appropriate selection, charging, orientation, training, and meaningful rewards for DLs to make their experience with the system more meaningful than just another service burden. Certainly
this process should include the development of qualifications and expectations for DLs. But it requires more. The DL system is inherently limited by the energy, foresight, and expectations emerging from the academic unit. The plan should outline procedures for approaching the academic units to develop this framework for the unit’s involvement with the LS. Some units already have a well-developed relationship, others will require considerable attention. The plan should also include strategies to reinvigorate this energy when new leadership arrives in the units. We also, however, urge that the DL selection process not lie solely within the academic unit. Particularly, we believe that the LLs have considerable insight and valuable information on possible candidates for the role within departments. We urge involvement of LLs in the process of identifying DLs. Our call is for the library to attend to, and assume responsibility for, strategies that will engage and enable the academic units to reinvigorate their relationship with the library.

3. **Specific attention to the broader communication expectations from the liaison system.** We recommend that the role and expectations for the public relations function be clarified for all involved in the LS. We view this public relations function as the broader, ongoing, two-way, relationship with the library’s key stakeholders in the academic units, including the sharing of goals, expectations and visions originating in the units and in the library. (This definition is captured in the “Liaison” section of the “Best Practices for Collection Managers” webpage.) Although the library’s communication with faculty needs to be broader than just the LS, library administration has in the past articulated the importance of the LS to this needed two-way communication. We found evidence of a clear emphasis in the current LS on the operational tasks rather than the public relations function, and if the LS is to fulfill the latter role, the developed plan should include specific strategies to achieve this reorientation to the public relations purpose.

There may, however, be a prior question: Might the more limited operational role be the proper role for the LS? Perhaps the library should be satisfied that LLs will always have important knowledge gained from their operational tasks. In short, this review should consider the workability of the LS model or other models that might be entertained in accomplishing the public relations function. Perhaps, structurally, LLs inherently operate at what we have called the transactional level, facing day-to-day tasks.

We recognize that library administrators of necessity operate at broader and more abstract levels, considering the direction of the library’s long-term evolution and the future of the library’s role in the academy. Two-way communication with the academic units is as vital to effectiveness at this level as it is at the transactional level. The translation of one of these levels into the other for purposes of communication in both directions is an often difficult problem. Our report points to the existence of this problem currently. Can LLs, with their more transactional responsibilities effectively become the eyes, ears, and voice of the library? Can the emphasis on those transactional duties be accompanied by the kind of environmental scan that will help reconcile the providers and the users of library services in the difficult adjustments now underway? Can communication through the LS
suffice to provide library administrators a realistic connection with stakeholders in the academic units? The review should assure that the broader role is workable and design specific plans to achieve it.

4. **Assessment of the workload of Librarian Liaisons.** We recommend recognition of the heavy load now borne by LLs and realistic examination of revised expectations of them. This may include work with managing priorities as well as efforts to channel greater resources to the LS.

5. **Further development of best practices.** We recommend further development of expectations and “best practices” for LLs. The current “Best Practices for Collection Managers” webpage probably reflects a greater emphasis on the collection development function than the more general responsibilities expected of LLs. Indeed, perhaps the application of the terms “collection managers” (this web page), “librarian subject specialists” (the webpage listing the LL’s departmental assignments), and “library liaisons” in various documents indicates the difficulty in effectively integrating the breadth of their responsibilities.

In addition, we would point out that this webpage emphasizes “core responsibilities” signified in the importance of the repeated introductory phrase “effective collection managers . . .” The content that follows this phrase seems designed to indicate minimal expectations for a judgment of work performance. The notion of “best practices” may be interpreted differently, as the identification of strategies employed by incumbents that are particularly effective in achieving the expectations outlined on this page. Our discussion of the variety of practices which characterize the LS lead us to recommend that more energy go into a true project of identifying and publicizing best practices in which those working as LLs have the opportunity to understand what works for others performing similar tasks. True best practices provide suggested strategies for incumbents rather than defining demands for satisfactory performance of their core responsibilities.

6. **Planning that recognizes the diversity necessary to a successful liaison system.** We recommend that the review and planning recognize the great diversity in the LS. Such recognition should include exploitation of the great creative talent in practical problem solving demonstrated by so many of the current LLs. Planning must also recognize the diversity of relationships between the library and the academic units. In addition, however, the diversity poses a difficult problem: how to design a system that will improve the overall quality of the LS while enabling the creative variety that must characterize the system in its particular relationships. We have spoken of times when the current system is receiving very little of its character from its systemness. Instead it is the diversity in the quality of people that determines its quality. The challenge is to design a LS that enables that quality and helps the weaker regions of the system participate in achieving the goals of an effective LS.
7. *A report on progress to the ULC.* We recommend that the library report back to the ULC on the review of the LS at the end of the 2006-2007 academic year.

**A Final Word**

The University Library Council expresses its appreciation to the library liaisons, the departmental liaisons, and those in leadership positions in the University of Maryland Libraries for their assistance with this project.

The ULC stands ready to assist the library’s administration in implementing our recommendations as effectively as possible through continued consultation, in its role as a committee of the University Senate, and in liaison to the broader campus community.

Approved and forwarded to the Dean of Libraries by the University Library Council April 2006
Appendix A
Sample Questions for Contacts with Librarian-Liaisons

Frequency and Substance of Contact

- How often do you contact the faculty liaisons in your departments? Does that vary by department?
- What are some of the situations in which you contact your liaisons?
- Do your relationships with your various liaisons differ? If so, how?
- Please describe the last contact you had with your liaison:
  - Who initiated the contact?
  - What was the substance of the contact?
  - Did the contact achieve your purpose? Was it worth your time?
  - Was the contact typical?
- Do you have particular ways that you keep in contact with your liaisons? How much are those strategies tailored for particular departments?

Perspective on the relationship to liaisons

- Are there matters in the performance of your assigned tasks in the library for which you depend on your liaison? What are those matters?
- In which of the following situations would you contact your liaisons:
  - A request has been received from a patron to purchase a book that you would authorize out of the department’s monograph budget.
  - A decision had to be made about discontinuing the print version of a journal assigned to the department.
  - The reference desk reports particular student problems with an assignment by a professor in the department. Would you merely report the problems? Would you offer assistance in designing the assignment? Would you offer training?
  - The library has acquired a new database that you think should be of particular use to those in the department. You want to inform the department. You want to offer training to the department in its use.
  - A researcher asks a question about the library resources in an area of the department’s study that you do not understand.

Evaluation

- Is the library liaison system valuable to you? How could the system be made more valuable?
- Do you have a clear idea of what the purposes and uses of the liaison system are?
- Do you consider the time you spend in contact with liaisons an appropriate use of your time?
- Are there qualities in your liaisons that are particularly beneficial to you? Are there things that your liaisons do that you find particularly beneficial? particularly bothersome?
- How welcoming are your liaisons to contacts from you? Does this vary? How much do you welcome frequent contacts from your liaisons?
- Would you like to see more or less contact with your liaisons? On any matters in particular?
- Do you have strategies for participating in the liaison system that you think are unique or specifically useful?
- In your judgment, does the library place too much emphasis on the liaison system as a method of communication between faculty and the library? too little emphasis?
- As the ULC reports advice to the Dean of Libraries on the operation of the liaison system, what improvements would you recommend?
Appendix B
Sample Questions for Contacts with Departmental Liaisons

Frequency and substance of current contact

! Do you know who your liaison at the library is?
! How often do you have contact with your liaison?
! What are those contacts typically about?
! Please describe the last contact you had with your liaison?
  " Who initiated the contact?
  " What was the substance of the contact?
  " Did the contact achieve your purpose? Was it worth your time?
  " Was the contact typical?

Perspective on the relationship to liaisons

! Are there matters in your relationship or your department’s relationship with the library for which you depend on your liaison?
! In which of the following situations would you contact your liaison?
  " There is a new book in your discipline that you do not find in the catalog and should be added to the collection.
  " There is a new serial in your discipline to which the library does not subscribe and should.
  " You have received notice of a new database useful in your research that the library does not currently own or lease.
  " You are getting ready to assign a project to your class that requires library use and fear your students may not have the background to do the library work successfully.
  " While discussing an assignment with your class on which your students did poorly, you hear many complaints about their experience at the library. Do you report these to your liaison?
  " Do you report student success stories?
  " One of your colleagues has been charged $250 for a lost book that they know they never checked out of the library.
  " You have been using a new reference product through the university’s website that you cannot figure out how to use properly.

Evaluation

! Is the library liaison system valuable to you? How could the system be made more valuable?
! Do you have a clear idea of what the purposes and uses of the liaison system are?
! Are there kinds of information you wish you received regularly through the liaison that you do not now receive?
! Are there qualities in your liaison that you particularly admire? Are there things your liaison does that you particularly admire?
! How welcoming is your liaison to contacts from you? How much do you welcome frequent contacts from your liaison?
! Would you like to see more or less contact with your liaison? On any matters in particular?
! As the ULC reports advice to the Dean of Libraries on the operation of the liaison system, what improvements would you recommend?
! How long have you been a liaison? Do you consider the role a valuable service to your department?