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VCU Libraries Liaison Work Group Final Report

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Introduction

The Liaison Work Group convened in September 2019 to articulate the liaison model at VCU Libraries (VCUL) with a focus on strengthening collaboration and communication. This report reflects an environmental scan of liaison work at VCU Libraries and information collected during the course of a half day forum in December 2019. The latter was preceded by a full day forum in December 2018 that allowed the work group to identify key themes to pursue as part of liaison efforts. Communication, as one of those themes, was selected as the topic for the 2019 forum, allowing the work group to hear directly from liaisons about how to best communicate and collaborate with each other.

Background

VCU Libraries is in good company as academic research libraries across North America and the United Kingdom have re-examined liaison models to adjust to evolving research and teaching environments (Auckland, 2012; Jaguszewski & Williams, 2013; Kenney, 2014). The Association of Research Libraries' *New Roles for New Times* calls for an engagement-based model where "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" (Jaguszewski & Williams, 2013). This level of involvement requires an expansion of liaison roles and deep relationships with the university community.

New roles have been formalized in liaison frameworks covering the aforementioned engagement and relationship building as well as a long list of other activities including collection development, research services, teaching and learning, digital scholarship and community outreach (Church-Duran, 2017). The need for so many skills and areas of expertise require great collaboration given that "it's highly unlikely that one person would have all the capabilities needed to scope, design, build, deliver, and scale a solution" (Norberg & Wallace, 2015, p. 9).

Various methods have been used to reconceptualize and describe liaison models and frameworks (Banfield & Petropoulos, 2017; Colding & Venecek, 2015; Ippoliti, 2017; Schoonover, Kinsley, & Colvin, 2018). Specifics vary, but case studies suggest that success requires dedicated time, in the form of retreats, meetings, and/or timelines, to create a participatory process with users as a focus. Three of the four authors of this VCU Libraries report participated in the Association of Research Libraries' Liaison Institute, a program that provided a venue to investigate trends and approaches in liaison librarianship (Rockenbach et al., 2015). Our experience at the institute inspired

the aforementioned forums and allowed for broader participation in the effort to articulate liaison practice and advance both internal and external collaboration.

Definition of liaison

Liaisons have traditionally been defined as librarians with subject-based assignments to schools/departments. A changing research and teaching landscape, as well as a move towards librarian engagement throughout the lifecycle of research and teaching, requires subject liaisons to take on new roles and/or work in concert with liaisons working in functional and non-subject specialty areas.

We use the term liaison, but the report describes more than a singular role. Rather, it is a collaborative and dynamic endeavor relying on a rich mix of expertise. In fact, many of those involved may not describe themselves as a liaison, but they are nonetheless vital to engagement with the university community. **At VCU, we define a liaison as a library employee responsible for relationship-based outreach to groups or individuals in order to advance their success in research, learning, teaching, and creative endeavors.**

Liaisons advance the strategic mission of the university by providing direct support for instructors and researchers. Accordingly, a liaison may be assigned to an academic or administrative unit, or they may focus on a functional or specialty area. In all cases, success hinges on proactive engagement and relationship building with strategically identified groups. Liaisons serve as a primary contact for a specific subject or functional area with a high level of direct contact with students, faculty, administrators, clinicians, and/or community members. Liaison activities include instruction, outreach, relationship building, research support, and collection development. While these types of roles and activities may be included in the responsibilities of other positions, the definition presented here is specific to those with job responsibilities primarily focused on liaison work.

Liaisons are distributed throughout the organization across 8 departments, representing all four divisions--all with overlapping responsibilities and goals. See Appendix A for a table with an overview of the liaison work being conducted around the library.

VCUL's liaison model and its goals

Simply put, the VCUL liaison model is collaborative. All of the groups listed in Appendix A work together to fulfill key roles and offer expertise that no one liaison can do alone. Different subjects and functional areas have different needs. Subject liaisons can

collaborate with functional experts to develop in areas most applicable to them and those they work with. Functional liaisons can work across disciplines in partnership with subject liaisons focusing on the areas that are most strategic for them. This level of flexibility allows liaisons and VCUL to adapt and innovate, creating services as dynamic as the communities we serve. In order to ensure a successful collaborative model and effectively support our communities, we should continue actively strengthening collaboration and communication.

The model described here also benefits from contribution and collaboration from parties who may not meet the definition of liaison outlined above but are engaged in job responsibilities related to liaison work. Elements of this report will apply to employees throughout the library to varying degrees depending on job responsibilities, and the work group anticipates that ongoing efforts to strengthen the model will involve and benefit all of those involved in the liaison endeavor.

Effective methods for communication and collaboration

Liaisons have created an extensive communication network to support collaboration using a diverse set of methods that vary in formality and regularity. This happens at all levels (individual liaisons, department heads and functional area leads, and even entire groups) around a range of purposes: information sharing, discussion and feedback, and decision-making.

To better understand the scale of collaboration, the work group categorized current methods:

- Formal standing committees or workgroups with a charge (example: Research Data Services Work group)
- Standing interdepartmental meetings (examples: monthly Collections meeting; regular meetings between high-collaboration liaisons in different departments)
- Informal and ad hoc collaborations of those with shared interests, expertise, services, and/or subject area responsibilities (examples: digital scholarship, standing or project-based meetings between subject librarians and collections librarians who liaise with the same departments)
- Event/workshop-based collaborations (example: Data Carpentries)
- Communication and collaboration across time and physical distance (examples: meeting notes shared on staff blog, swing space/drop in hours)
- Groups formed around internal workflows or practices (example: LibGuide curators)

See [Appendix B](#) for a more comprehensive list of examples.

The ideal framework for this communication and collaboration is flexible, allowing liaisons to select the best approaches for the needs of those working together and continuously adapt as needed. The framework can be both flexible and intentional. To ensure all perspectives are represented, all stakeholders should be identified at the start of any new partnership with continued assessment and the addition of new partners as needed. It is also important to determine the needs and preferences of each stakeholder or stakeholder group in order to select methods of communication and collaboration that allow each to fully engage with and benefit from the partnership. Finally, it is important to adapt the level of formality required in ongoing collaborations, building more structure when needed and removing or modifying structure that no longer serves the partnership. This requires dedicated time and effort, including reflection on and revision of approaches as needed.

The work group was able to develop this framework and the following recommendations for communication and collaboration based on work completed at the aforementioned forum in December 2019 ("What I Need From You" activity) and from general feedback collected during the December 2018 forum.

Recommendations to strengthen framework for liaison communication and collaboration
- Establish a standing Liaison Work Group with managers and representatives from departments engaged in liaison work in order to implement the recommendations outlined in this report.
- Build in support for the time and effort it takes to effectively collaborate. A good start would be to include collaboration as a work plan goal for liaisons.
- Develop recommendations for effective and "right sized" information sharing (including meeting notes) across divisions/departments by all liaisons. These recommendations may be of interest library-wide.
- Explore and share data across library departments to understand campus engagement, inform the practice of individual liaisons and collaborative initiatives, and develop shared services and programs. Use a combination of qualitative and quantitative data and build research questions for collaborative research about liaisons' work that will inform future practices.
- Refine communication between academic units (schools and departments) and library liaisons. Create a system for sharing newsletters (newsletters developed by schools/departments/units as well liaison librarians), curriculum committee

notes, and additional internal information from academic units across liaison departments.

- Create an internal list of liaison roles, departments supported, and/or expertise in order to facilitate the identification of collaborators and increase knowledge of "expert" areas. Consider ways to further highlight liaison expertise in functional or specialty areas to external university units.
- Complete a shared projects list for groups served by multiple departments. For example, a list has been started for VCU Libraries Projects with Centers/Groups.
- Establish a culture of purposeful information sharing that lays groundwork for effective and collaborative relationship building with external groups. Needs exist on a spectrum ranging from "Who do I need to tell?" (example: courtesy copying colleagues on email) to "Who could I invite to participate in this effort in order to deepen its impact?" As a first step towards establishing this culture, document concrete examples of purposeful information sharing practices currently used by liaisons.

There are some areas we see specific potential for growth or formalization of collaboration:

- The research lifecycle (literature reviews, joint research projects, grant identification and writing, data management, publishing)
- Multi-departmental support for VCU Centers/Institutes and VCU Health
- VCU Libraries sponsored workshops, educational programming, and other professional development opportunities
- Online learning object development
- More collaborative work plans that include more consistent statements of liaison responsibilities and provide opportunities for collaborative goal setting. Department heads of liaisons who collaborate closely, as well as liaisons themselves, should work in concert to ensure shared expectations in work plans.
- Assessment of liaison program effectiveness as well as assessment of individual efforts.

A vision for ongoing professional development and learning opportunities

Managers should work with individual liaisons to identify unique opportunities for growth in subject or functional areas. Additionally, professional development and learning opportunities should be made available to any interested VCU Libraries employee (including student employees and interns). Learning needs will vary greatly, so we

recommend a broad approach that provides professional development on the shared needs of a collaborative model like the one at VCU Libraries including:

- Ongoing opportunities to share and grow by learning from one another. Possible activities include:
  - "Mini-con" programming (example: liaison and instruction mini-cons)
  - Sharing Sessions (example: covering key topics, SCP summer PODcast series, article and book discussions)
  - Group webinar viewings (example: invites to relevant MLA webinars shared broadly)
  - Informal inter-departmental meetings (example: AO-RED get together)

- Annual forum based on library goals and trends for liaisons. The program should be participatory and offer time for reflection.

- The upcoming year will be challenging due to COVID-19, so rather than trying to continue regular forum planning, we recommend holding a focused online gathering on virtual communication and collaboration with the following goals:
  - Continue the development of cohesion among groups
  - Keep up the momentum of liaison forum efforts
  - Focus on the highest priority needs of liaisons

What Administrative Council can do to advance liaison success

Liaison success requires ongoing administrative support. It is important to create and sustain a structured channel with the Administrative Council to communicate about the work of liaisons.

- Due to the highly collaborative nature of liaison work, Administrative Council should charge a standing Liaison Work Group (see Appendix C for a draft charge). While the key players meet regularly, we need dedicated time to go beyond day-to-day operations and devote time and effort to the shared goals and recommendations listed throughout this report.

- Associate Deans should continue meeting with liaison managers and functional leads at least twice a year.
  - An agenda should be set in advance, developed by the liaison group and shared with Associate Deans for feedback and additions.
  - Updates can be shared in advance to support discussion and agenda setting around future-focused initiatives, and identifying and discussing

strategic opportunities for new collaborations.

- Administrative Council and liaison departments should work together on liaison-led revisions to "Statement of Responsibilities" that are shared by all liaisons. There are recent revisions for:
  - Academic Outreach
  - Research and Education
  - Scholarly Communications and Publishing

- In recognition of the impact of past and current financial support of individual liaisons and the liaison model, Administrative Council should continue to provide:
  - Support for individual liaisons through professional development funds, including continued support for liaisons to participate in opportunities unique to their subject or specialty areas. For example, liaison attendance at conferences specific to their subject or specialty area that do not have a library focus.
  - Support for opportunities to advance the liaison model. For example, administrative support for group attendance at the ARL-ASERL Liaison Institute in 2018 and support for VCU Libraries Liaison Forums.

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Appendix A. Table of liaison work by division/department

This table includes the departments and work most focused on public-facing liaison work. Departments with liaisons may have additional responsibilities not listed that fall outside the aforementioned definition. Note that the information in this table is likely to continue to evolve, so it should be considered a living document.

Department/ Division	Disciplinary or functional focus	Groups served	Additional areas	Key activities
Academic Outreach (AO)	Humanities, social behavioral sciences, education, public affairs, business, sciences, engineering, arts	Undergraduate students (in their majors), graduate students, faculty, and administrative contacts on the Monroe Park Campus	Graduate School, Center for Teaching and Learning Excellence (CTLE), Humanities Research Center	Instruction (curriculum integrated and workshops), research support, communication between schools/departments and VCU Libraries, outreach and relationship building
Collections Analysis and Investment (CAI)	Humanities, social and behavioral sciences, public affairs, business, sciences, engineering, arts	Undergraduate students, graduate students, faculty, and administrative contacts (including procurement and legal) on both campuses	Donors, vendors	Recommend, select, and curate resources (ebooks, journals, monographs, catalogs, reports, and electronic databases) including trials, evaluation and communication; stacks management & storage and preservation; direct communication with faculty and students.
Health Sciences Collection Management (HSCM)	Health sciences schools, colleges, and departments on the MCV Campus; VCU Health; Patient health information and clinical education.	Undergraduate students, graduate students, faculty, postdocs, residents, fellows, and administrative contacts on the MCV campuses, including VCU Health.	Donors, vendors	Recommend, select, and curate resources (ebooks, journals, monographs, catalogs, reports, and electronic databases) including trials, evaluation and communication; stacks management & storage and preservation; direct communication with faculty, staff, and students.
Innovative Media (IM)	Enhancement of media and maker technology literacy, production of creative or scholarly multimedia works	Undergraduate students, graduate students, faculty, and staff	Academic Technologies, ALTLab/Online@VCU, Center for Teaching and Learning Excellence (CTLE), Department of Focused Inquiry, Art Foundation Program,	Faculty consultation related to curriculum development and scholarly research, instruction (course integrated and workshops), group and one-on-one project

			VCUarts, Institute for Contemporary Art, Community Organizations	assistance, access to creative technology and software
Research and Education (RED)	Health sciences schools, colleges, and departments on the MCV Campus; health literacy; consumer and patient health information and education; VCU Health	Undergraduate students, graduate and professional students, postdoctoral fellows, faculty, and administrative contacts on the MCV Campus; VCU Health clinical staff including VCU Health residents/fellows and nurses, physicians, and patients	Graduate School, VCU Health, Wright Center for Clinical and Translational Research (CCTR), the Office for the Vice President of Research and Innovation (OVPRI), VCU Center on Health Disparities (CoHD), and the greater Richmond community (through Health and Wellness Library)	Instruction (curriculum integrated and workshops), research support, systematic review support, research impact and grant writing support, outreach and relationship building. Outreach, engagement, and relationship building with the Greater Richmond Community.
Scholarly Communication and Publishing (SCP)	Publishing, open and affordable course content, research data, open access, research impact, scholarly identity, copyright, digital scholarship	Graduate students (primarily, but undergraduate students as well), faculty, and administrative contacts on both campuses	Center for Teaching and Learning Excellence (CTLE), ALT Lab/Online@VCU, Graduate School, Wright Center for Clinical and Translational Research (CCTR), the Office for the Vice President of Research and Innovation (OVPRI)	Instruction (curriculum integrated and workshops), research support, outreach and relationship building on both campuses, digital scholarship and publishing support
Special Collections and Archives (SCA)	Manuscripts, rare books, and university archives; primarily focused on the arts, humanities, education, and social sciences	Undergraduate students, graduate students, faculty, staff, administrators, community members, and outside scholars	Community members, Friends of the Libraries, alumni, donors, community organizations, and area repositories	Recommend, select, and curate resources, Instruction (curriculum integrated and workshops), research support, outreach and relationship building, faculty consultation related to curriculum development and scholarly research
Teaching and Learning (TL)	Division of Community Engagement, Global Education Office, Global Student Success Program, Honors College, University College (Bachelor of Interdisciplinary Studies, Common Book Program, Department of Focused Inquiry)	Undergraduate students (pre-major), transfer students, living-learning communities, service-learning, study abroad students, local high schools, prospective undergraduate students, competitive inter/national fellowship applicants	Academic Technologies, ALT Lab/Online@VCU, Alumni Relations, Strategic Enrollment Management and Student Success, Center for Teaching and Learning Excellence (CTLE), National Scholarship Office, New Student and	Instruction (curriculum integrated), research support, undergraduate orientations and tours, outreach and relationship building with focus on the Monroe Park Campus, engagement, and relationship building with

		(students, faculty, and alumni), international students and faculty, community and alumni members, administrative contacts on the Monroe Park Campus	Family Programs, Office of Student Conduct & Academic Integrity, REAL Initiative, Residential Life & Housing, Student Accessibility and Educational Opportunity	the Greater Richmond Community.

Appendix B. Current communication/collaboration methods with examples

([Return to Effective methods for communication and collaboration](#))

Formal standing committees or work groups with a charge
- Research Data Services Workgroup
- Liaison Work Group
- Joint Online Learning Team (JOLT) (with LibGuide and video curation subgroups)

Standing interdepartmental meetings
- Monthly meeting between AO department head, RED department head, Research Data Librarian, and Scholarly Communications Librarian
- Regular meetings between department leadership including a monthly meeting between AO and RED department heads
- Standing meeting between AO and CAI counterparts; frequency depends on needs
- Quarterly meeting between Health Sciences Collections Librarian and RED Liaisons
- Monthly Collections meeting with CAI, AO, HS, SCA, and TL
- Quarterly meetings between School of Medicine liaisons and the Research Data Librarian
- Monthly meeting between AO and RED department heads

Informal and ad hoc collaborations of those with shared interests, expertise, services, and/or subject area responsibilities
- An informal digital scholarship interest group (with members from SCP, IM, and AO) meets once a month, usually over coffee, to talk about digital projects and queries from researchers. The group also talks about work at other institutions, collaboration opportunities, ideas for grants, and ways to develop the digital scholarship infrastructure at VCU Libraries.
- Systematic Review Group (Roy Brown, John Cyrus, Erica Brody, Rachel Koeing, Talicia Tarver, Sergio Chaparro)
- Research Interest Group (John Cyrus, Erica Brody, Nina Exner, and Pattie Sobczak)
- Pairings or groupings as appropriate for targeted patron needs, e.g. SCA Teaching & Learning Librarian and AO and CAI arts librarians, AO and CAI librarians who work in the same subject area.

Event/workshop-based collaborations
- Advance Your Research is an ongoing partnership of AO, RED, and SCP liaisons focused on graduate student outreach and education.
- Copyright for Creators, Science Speak, and Dissertation Retreats are examples of collaborative events from AO, RED, and SCP liaisons.
- Data Carpentry and Open Science Framework are collaborative workshops from the SCP Research Data Librarian and AO/RED liaisons.
- Pairs and small groups of liaisons frequently collaborate on workshops and instruction for specific departments and schools.
- GIS Day planning includes representation from IM, CAI, AO, RED, and other VCU groups.

Methods for communication and collaboration across time and physical distance
- Staff blog meeting notes (for department meetings, work groups)
- Swing space cube at Cabell
- Swing space time at HS for SCP
- Online drop in hours for AO with Research Data Librarian

Groups formed around internal workflows or practices
- Patron interaction and events reporting group (with representation from multiple liaisons), which assisted with the transition to the LibInsights platform for uniform tracking of public-facing engagement and whose members continue to maintain and update forms.
- Liaison Forum planning group (which transitioned into the Liaison Work Group)
- Joint Online Learning Team (JOLT) (with LibGuide Curators and Video Curators groups)

Informal and ad hoc collaborations
- Pairings or groupings as appropriate for particular patron needs, e.g. Special Collections and Archives Librarian + Arts Librarian, Subject Librarian + Collections Librarian, Research Data Librarian + Social Sciences Librarian, etc.

Appendix C: Standing Liaison Work Group draft charge

Draft of charge

Purpose and background: VCU Libraries is engaged in library liaisonship across all divisions, and library liaisons enjoy a high level of engagement with the university community. Within VCU Libraries, liaisons with subject and functional expertise work together to fulfill key roles within the university and offer unique expertise that no one liaison can do alone. This level of flexibility allows us to continually adapt and innovate, creating services as dynamic as the community we serve. In order to maintain the effectiveness of this collaborative model over time and changes to the university community's needs, a standing liaison group

Charge: To support and advocate for the roles and responsibilities of subject and functional liaisons in order to improve liaison practice, strengthen communication and collaboration, and continually adapt the liaison model to respond to the changing needs of the university community.

Tasks:
- Review and finalize the draft work group charge
- Support and track the implementation of recommendations from the Liaison Work Group Report (2020)
- Maintain communication with Administrative Council about strategic liaison initiatives
- Offer ongoing professional development opportunities for liaisons based on shared needs.
- Provide ongoing assessment of the liaison model and liaison needs
- Make recommendations for improvement and iteratively review the liaison model
- Provide support for continued and new collaborations among liaisons

Decision-making practices: The group will review the VCUL liaison definition on an ongoing basis in order to identify others who should be involved in liaison efforts or as members of the work group. The group will also look for opportunities to work with and support others who may noy be liaisons but who have some liaison responsibilities, including opportunities for professional development and collaboration among library employees.

This group will serve as a bridge/communication channel between Administrative Council, department heads, and subject and functional liaisons, informing and seeking

feedback from liaisons about administrative and division/department-level decisions that impact liaisons and communicating liaison feedback "up the chain." Work group members are expected to solicit and represent liaison viewpoints from their departments and/or divisions. Professional development and future recommendations should be driven by feedback and ideas from liaisons. The group will also consider how to fulfill its charge with a high level of transparency. Some potential activities include regular updates posted on the staff blog, an annual report, and open meetings.

Membership and reporting: The work group will consist of at least five members, with at least one representative from each division. It would be helpful to expand representation outside the core groups (AO, RED, CAI, SCP) for the fifth member. New perspectives are welcome, but we recommend including some members from the current group for continuity.

The work group will continue to report to Administrative Council with an assigned liaison.