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Life after reference: Casting a new liaison model

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What does it mean to be a liaison librarian without reference?

Our name changed, and desk hours disappeared. Well-defined services like instruction and consultation remained, but there were also new, more amorphous expectations.

With the creation of the Academic Outreach department, liaisons moved away from a reference-based model in order to forge deeper connections with their academic departments. Liaisons were doing interesting things including office hours, workshops, and events. However, efforts were largely driven by library priorities with no way to measure success or make decisions about what to do and not do. In order to move forward, we needed to challenge our assumptions about what our users value and recast ourselves accordingly.
The Canvas

It is easy to use and adapt for a variety of environments. Composed of nine building blocks visually represented on a canvas, it maps “how an organization creates, delivers, and captures value” (Osterwalder & Pigneur, 2010, p. 14).

How it worked:

1. Canvas printed and posted (Business Model Foundry, 2014).
2. 9 areas explored through discussions and interactive exercises.
4. New individual and department goals generated.

The Numbers

1 library department
9 librarians
12 months
13 meetings
80 academic departments
500+ sticky notes
20,000+ students and faculty
Students

- Have little awareness of liaisons.
- Like librarians but do not associate them with the specialized research in their major.
- Identify with their departments/programs though liaisons may be organized by broad subject areas.
- Want librarians to make connections and establish a presence in their "spaces."

To move beyond assumptions, we needed to listen and find out what our students really need. For example, we led a group of students, members of the undergraduate library advisory committee, through a series of exercises to learn more about their research. The discussion revealed some challenges (above). “Your Research Pain Points” (right) is an example of an activity.

Reflect:

- Students characterized their needs as unique and different from Focused Inquiry (required composition classes). For example, a dance student noted the difficulty finding help for creative research even though we have a librarian with educational and professional experience in this exact area.

- There were many strategies for getting help, but almost none involved a liaison librarian. Not surprisingly, teaching assistants and instructors were seen as more knowledgeable about subject-specific needs, but peers and parents were also mentioned. They did remember methods taught by librarians in Focused Inquiry but were not necessarily able to apply them to their current assignments.
Breaking Patterns

To be successful we needed to

- Carve out time
- Try new things
- Tap into creativity
- Set things in motion

Carve out time

- Some longer meetings but most work was at department meetings, in some cases only using 15 minutes.
- There was often “homework” but with reasonable and realistic limits. Everyone can find 15-20 minutes.

Try new things

Facilitated discussions in new ways. Inspired by sources such as Creative Confidence (Kelley & Kelley, 2013).

Reflect:

- The specifics varied, but discussion focused on relationship building in more intentional ways. We rely heavily on “word of mouth” but it is not accidental.
- Some enjoyed the exercise so much that they took their maps with them to post on their walls and continue working on them.

Mindmap Your Communication Channels

Need: big pieces of paper and markers and at least 15-20 minutes mindmapping (can be homework) and the same for discussion

1. At center of paper, write your communication challenge. This can be a specific question. It can just be ‘how do I communicate with ______?’
2. Start making connections. Think about the channels you currently use. Which ones work the best? What channels should you use? You could also use a who/what/when/where/how framework.
3. Just write what comes to you until times run out. Don’t let the format slow you down. If you work better on a computer, do that. If you like lists, do that. Just keep the ideas coming until time is up.
4. Report to group, briefly. Focus on priorities, new ideas, your biggest challenges, and so on. Discuss what you learned from each other.
Tap into your team’s creativity

- Make time to “jumpstart” creativity. We drew ourselves at work with crayons, played charades, and more—all to take ourselves out of the day-to-day and become more open to new ideas.
- Think beyond time and resources limits.
Breaking Patterns (cont’d)

To discuss desired outcomes, we asked:

Imagine you had the best year ever as a liaison. What does that success look like? This is imagination so don’t worry about the very limited time and resources we face in reality. List your top 3-5 indicators for discussion.

This allowed us to explore what success as a liaison should look like without worrying about practicalities. In the end, many indicators judged unrealistic at first, actually seemed reasonable. Furthermore, all individual ideas fit within a spectrum developed during discussion.

Set things into motion

- Make it actionable. There were previous discussions and time-consuming projects that ultimately didn’t lead to action. It was important the process resulted in actionable goals.
- Individual librarians used all of their work on the canvas to set key activities for their year.
- Document everything. We captured as much of the process as possible in order to reflect and identify areas for departmental support.

‘What does Liaison success look like?’
To craft our future we developed a model:

- Define
- Operationalize
- Assess
- Evolve

Define

- Developed a shared definition of academic outreach.
- Created inventory with university and library data by academic department for a better understanding of students and faculty. Improved onboarding process.
- During the course of the canvas work, we integrated four new librarians into the process.

Operationalize

- Developed liaison campaign with eye catching, subject-related collages and language connecting liaison expertise to subject specific research needs.

Liaison PR Campaign Sample Poster (right)
& Postcard (below)
Assess

- While we did not resolve larger liaison assessment issues, we did explore what liaison success looks (or should look) like.
- Some experimented with tracking faculty interactions as an individual goal.
- We took time to share and assess progress on individual key activities, as well as offer supportive feedback to each other.

Evolve

- It is not enough to do this once. We need to continue evolving and adjusting our strategies.
- What we learned will help us continue to make decisions about how to best spend our time.
- We are looking for ways to listen more to students.
- Efforts largely focused on students, but we also want to explore faculty services.
- We want to take a closer look at how to assess and articulate liaison impact.

Canvas Progress Check Madlib

I did ____________________________
______________________________
______________________________
______________________________
______________________________
______________________________
in order to ______________________
______________________________
______________________________
______________________________
______________________________
It went ________________________
______________________________
______________________________
______________________________

More details about how things went:

______________________________
______________________________
______________________________
______________________________

I learned ______________________
______________________________
______________________________
______________________________

______________________________
reflection

My next steps are __________________
______________________________
______________________________
______________________________
______________________________
______________________________

______________________________
action
Liaison Model Canvas Case Study

Janet Reid
Business Research Librarian

Communication Channels + Goals Mindmaps

- Communication Channels
  - Increase Awareness and Use of Liaison and Services
  - Communication Options
    - Update Personal Knowledge
      - Canvas Graphics
    - Support Project + Overarching Goals
      - Collaboration Goals
    - Personalized Engagement
      - Student Engagement Goals
    - Event Partners
      - Library Services Focus Group on SEO
    - Meet with 10 Business Student Organizations
    - Intro to Academic Advising Office
    - GIS Day
    - Nobel Peace Prize Event
    - Fall in Love with Your Favorite Database

-计划 for Expanding Communications
  - Find Key Contact Summer 2019
  - Fall Implementation 2019
  - Key Partners
    - Student Engagement Office
    - Academic Advising Office
  - Key Resources
    - Library Marketing Materials
    - Event Themed Treats

Individual Canvas

- Key Activities
  - Student Engagement Events
  - Library Services Focus Group on SEO
  - Meeting with 10 Business Student Organizations
  - Intro to Academic Advising Office
  - GIS Day
  - Nobel Peace Prize Event
  - Fall in Love with Your Favorite Database

- Progress Check Made

  - I did (key activity)
    - Increased communication with faculty and students through participation and visibility via orientations, forums, pop-up hours, consultations, learning activities, surveys, and department meetings.
    - Increase awareness and use of the business librarian and library services and establish an outreach strategy.

  - In order to (goal)
    - Increase awareness and use of the business librarian and library services and establish an outreach strategy.

  - It went (adjective)
    - Well for a beginning.

  - More details about how things went:
    - Each activity showed me new ways to connect, the process for getting things done and people who want and need help with the library.

  - I learned (reflection)
    - Each step leads to opportunity to do more, connect more and deepen the partnership and value of the library.

  - My next steps (action)
    - Involve building on the steps taken thus far because these actions primarily scratched the surface of what could be accomplished. Additionally, I want to find ways to establish points of need marketing for faculty and students on a regularly scheduled basis during the semester. For example, directed at assignments and research needs.