2019

**Life after reference: Casting a new liaison model**

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**The Question**

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
The Reality Check

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.

Your research pain points

Need: paper, markers, and 20 minutes

1. Think about your last research project. (3 mins)
   - What was it?
   - What were the roughest spots, your pain points?
   - Write them down!

2. Pair up and share your challenges. (7 mins)
   - Discuss possible solutions.
   - Take notes.

3. Report to group and discuss. (10 mins)
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.
**Breaking Patterns (cont’d)**

**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.

![Brainstorm Mapping](image)

Communication Channels
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.
Forging Ahead (cont’d)

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 ________________________
_______________________________
goal ____________________________
It went _________________________
More details about how things went:
_______________________________
_______________________________
_______________________________
I learned ________________________
_______________________________
reflection _______________________
My next steps are __________________
_______________________________
_______________________________
_______________________________
The Liaison Model Canvas

**Key Partners**
Identify the partners you need to be successful.
- What internal and external partners do you need to offer your key activities and reach your segments?

**Key Activities**
Identify the activities that will allow you to reach your goals.
- What activities does your value proposition require?
- What new things can you do to build relationships?

**Value Propositions**
Identify the value you deliver to each of your segments.
- What problems are we trying to solve?

**Relationships**
Describe the relationships with our segments.
- What type of relationships do we want?
- What type of relationships do our segments want?

**Segments**
Define the groups we serve.
- For whom are we creating value?
- Are there segments with different needs and problems?

**Channels**
Communicate with and reach out to segments.
- How are we reaching them now?
- How should we be reaching out?
- What works best?

**Cost Structure**
Determine the most important costs.
- What are the most important resources required for your model to be successful?

**Outcomes**
Move beyond transactions.
- What should success look like?
- What should it look like for students/faculty/library administration/other stakeholders?
Canvas Graphics (cont’d)

Liaison Model Canvas Case Study | Janet Reid Business Research Librarian

Communication Channels + Goals Mindmaps

- Increase Awareness and Use of Liaison and Services
  - Communication
    - Email alert
    - Meetings
  - Options for Communication
    - Social Media
    - Website
    - Email Alerts

Options for Communication

- Academic Advising
- Faculty/Instructors
- Student Events

Plan for Expanding Communications

- Find Key Contact Summer 2019
- Fall Implementation 2019
  - Evaluate Class Participation
  - New Research Guides
  - Collection Development
  - Support Department Events
  - Promote Office Hours

Individual Canvas

- Key Activities
  - Student Engagement Events
  - Library Services Focus Group with 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
- Key Partners
  - Student Engagement Office
  - Academic Advising Office
- Key Resources
  - Library Marketing Materials
  - Event Themed Treats

Progress Check Madlib

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 more ways to connect, the process for getting things done and people who want and need to partner 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 point of need marketing for faculty and students on a regularly scheduled basis during the semester. For example: directed at assignments and research needs.