

5-22-2017

## USFT Services Assessment ROLES Report Recommendations 20170522

USF Libraries

Follow this and additional works at: [https://scholarcommons.usf.edu/usf\\_lda\\_data](https://scholarcommons.usf.edu/usf_lda_data)

---

### Scholar Commons Citation

USF Libraries, "USFT Services Assessment ROLES Report Recommendations 20170522" (2017). *All Assessment Data*. 72.

[https://scholarcommons.usf.edu/usf\\_lda\\_data/72](https://scholarcommons.usf.edu/usf_lda_data/72)

This USF Tampa Library is brought to you for free and open access by the USF Libraries Data and Assessment at Scholar Commons. It has been accepted for inclusion in All Assessment Data by an authorized administrator of Scholar Commons. For more information, please contact [scholarcommons@usf.edu](mailto:scholarcommons@usf.edu).

# **Re-Imagining Our Library Engagement Services (ROLES)**

## **Final Report and Recommendations**

May 22, 2017

**Project Leader:** Jennifer Friedman  
**Administrative Liaison:** Nancy Cunningham

**Steering Committee**  
Jennifer Friedman, *Chair*  
Maryellen Allen  
Susie Arieu  
Jason Boczar  
Nancy Cunningham  
Bonita Pollack  
Drew Smith  
Nora Wood



## Table of Contents

<b>Project Description</b>	<b>5</b>
<b>Project Process</b>	<b>5</b>
<b>Steering Committee Teams, Charges and Highlights</b>	<b>7</b>
<i>Steering Committee</i>	7
<i>Academic Needs</i>	8
<i>Curriculum</i>	8
<i>Data Gathering &amp; Analysis</i>	9
<i>Models</i>	9
<i>SWOT</i>	10
<b>The New Model</b>	<b>11</b>
<i>Traditional</i>	12
<i>Functional</i>	14
<i>Subject Team</i>	16
<b>Management in the New Model</b>	<b>18</b>
<b>The Role of the Liaison Librarian</b>	<b>19</b>
<b>Assessment of the New Model</b>	<b>20</b>
<b>The Liaison Program Framework</b>	<b>21</b>
<b>The Liaison Toolkit</b>	<b>23</b>
<b>Succession Planning</b>	<b>24</b>
<b>The Library Research Assistant Program</b>	<b>25</b>

<b>Recommendations</b>	<b>26</b>
<i>Personnel</i>	26
<i>New Liaison Model</i>	26
<i>Projects</i>	27
<i>Liaison Toolkit</i>	28
<i>Marketing &amp; Communications</i>	28
<i>Reference Services</i>	29
<i>Metrics</i>	30
<i>Outreach</i>	31
<i>Project Management</i>	32

<b>Works Consulted</b>	<b>33</b>
------------------------	-----------

<b>Appendices</b>	<b>Appendix Binder</b>
<i>Reading List for Liaison Program</i>	A
<i>ROLES Committee and Team Members</i>	B
<i>Academic Needs Team Final Report</i>	C
<i>Curriculum Team Final Report</i>	D
<i>Data Gathering &amp; Analysis Final Team Report</i>	E
<i>Models Team Final Report</i>	F
<i>SWOT Analysis Team Final Report</i>	G
<i>Infographics for New Model</i>	H
<i>Liaison Assignments for Academic Departments</i>	I
<i>Liaison Assignments for Administrative Units</i>	J
<i>Informatics Librarian Job Posting</i>	K
<i>Liaison Program Framework</i>	L
<i>Liaison Toolkit Outline</i>	M

## Project Description

In 2015, the USF Libraries Academic Services department determined that the research and instruction landscape at the University had changed over time, and it was time to review and reconfigure the Liaison Program to meet the research and instruction needs of the University for the next five to seven years. The Re-Imagining Our Library Engagement Services (ROLES) project began in March 2016 and teams were created to examine various aspects of the Liaison Program and how the Program could be re-imagined to effectively support the research and teaching mission of the University.

## Project Process

Discussion of the project began in early March 2016 after the recently hired Assistant Director (AD) for Research Services had acclimated to the Academic Services department. The AD for Research Services researched the literature about liaison programs and developed a reading list of key articles together with chapters from the book *Assessing Liaison Librarians: Documenting Impact for Positive Change* about liaison programs (see *Appendix A*). The Director of Academic Services, AD for Research Services, AD for Instructional Services and AD for Digital Learning Initiatives met and brainstormed what questions they would ask if they were crafting a liaison program. From the initial exhaustive list, the group narrowed the questions down to four main areas of focus:

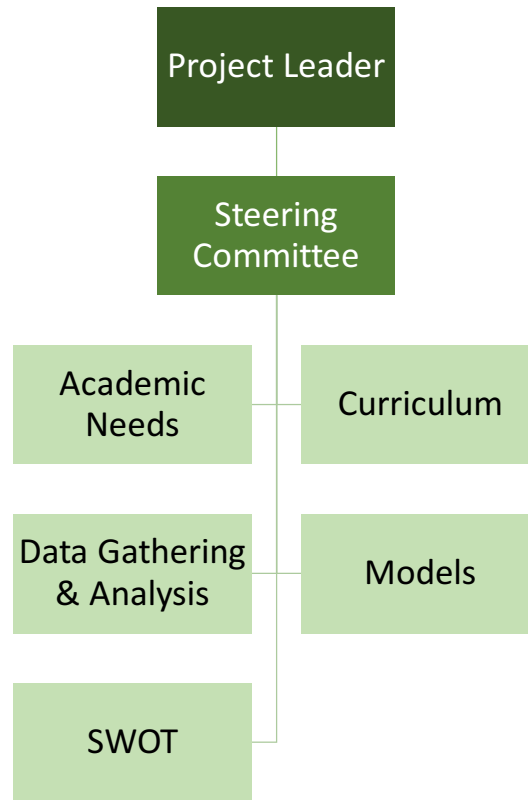
1. How are liaison programs in other universities structured and how do they work?
2. What are the strengths and weaknesses of the current liaison program at the USF Libraries?
3. What are the research and instructional needs of the faculty and students?
4. What quantitative data is available and which data is useful for the project?

The project was structured with the AD of Research Services serving as the Project Leader. A Steering Committee would oversee the project under the direction of the Project Leader. Four teams were developed based upon the main areas of focus above:

- Models (1)
- SWOT Analysis of Liaison Program (2)
- Academic Needs (3)
- Data Gathering & Analysis (4)

However, it quickly became apparent that the research and instructional needs of the faculty and students represented too large a scope for the Academic Needs team alone, and as a result, two separate teams were developed: Academic Needs and Curriculum. Each team would be led by a member of the Steering Committee.

## ROLES Project Structure



The structure was deliberately created to be a team process that involved all librarians and selected staff in Academic Services, as well as librarians in Academic Resources and Digital Scholarship Services. We recognized early that it was important to involve all librarians in the Academic Services department and utilize their skills and interests. By including other departments, we created opportunities for us to learn more from each other about how our work is related. Each team, with the exception of Curriculum, had at least one librarian from Academic Resources and/or Digital Scholarship Services on it (see *Appendix B*).

The Steering Committee met first, reviewing the charges of each team and setting the expectation that Steering Committee members who were also team leaders would act as facilitators for their teams. The Steering Committee determined that the online project management tool Trello would be used to keep track of each team's progress so that information would be transparent to everyone involved in the project. Boards in Trello were created for each team to put their work. It was agreed that agendas, minutes, team questions and action items would be tracked on the boards. Library Administration also requested that milestones be developed for each team to track its progress, which were also posted on Trello.

While the Steering Committee was developing its work, everyone involved in the project was assigned readings to complete for discussion in the weekly Academic Services meetings. The readings helped everyone develop an initial knowledge base of liaison program trends and challenges. By mid-April, each of the Teams had started its meetings. Each Team met to discuss its charge and brainstorm the questions it would use to guide its work. After each Team developed its questions, the Steering Committee met to discuss potential overlap between teams and ensure that teams would not replicate each other's work.

From April 2016 through April 2017, each of the Teams worked on its charge and produced final reports for the Steering Committee. After the final reports were completed, the Director for Academic Services, AD for Research Services and the AD for Instructional Services met to discuss a new model, which was presented to the Steering Team and approved. The Steering Team also reviewed the final reports and made recommendations for the project, which are presented later in this document.

## Steering Committee, Teams, Charges and Highlights

The Steering Committee and each Team were charged with investigating various aspects of the liaison program, with the Steering Committee overseeing the project. Below are the charges and highlights of each Team's work:

### Steering Committee

#### Charge

The *ROLES Steering Committee* will lead the effort to re-imagine the liaison program at the USF Libraries. Members of the committee will lead teams focused on different aspects of information gathering and analysis for the re-imagining process. Working to involve members of the department in the process, the committee will share information about team progress, and engage the department with activities such as directed readings and discussions. The committee will also ensure that the department and the Libraries are kept informed about the project as it progresses. The committee will analyze and discuss the reports from the different teams and create a report with overall recommendations for a liaison program for Libraries Administration.

#### Team Highlights

- Managed work of individual teams to avoid duplicate work
- Kept Committee updated on each Team's work
- Shared information to assist other Team Leaders in their work
- Developed a guiding Framework for the Liaison Program
- Developed new model and final recommendations for the project



## **Academic Needs**

### Charge

The *Understanding USF Academic Department Needs* team will gather and analyze qualitative data about the needs of USF academic departments, focusing on faculty, graduate and undergraduate needs. The team will develop methods to unearth information about department needs, including those that already use the Libraries and those that do not currently use the Libraries. The team will develop a report detailing their findings with a focus on ensuring that the needs of faculty, graduate students and undergraduate students from different departments are well-represented.

### Team Highlights

- Define academics needs as the research and teaching needs of the USF faculty and students.
- Developed rubric for analyzing department websites
- Created questions for interviewing academic administrators
- Interviewed academic administrators
- Analyzed information interviews for insights into academic needs

## **Curriculum**

### Charge

The *Curriculum Team* will gather and analyze data regarding the presence of course assignments that require information literacy skills within college and departmental curricula using available academic departmental resources, with a focus on course syllabi. The team will identify methodologies that will inform the ROLES steering committee about the levels of need for students with respect to information literacy instruction. The team will develop a report detailing their findings with a focus on ensuring that the instructional needs of faculty, graduate students and undergraduate students from different departments are well-represented in both online and face-to-face environments.

### Team Highlights

- Established a methodology for analyzing syllabi to determine the extent of research involving library resources in the curriculum
- Developed a rubric to analyze individual syllabi
- Evaluated over 1,000 courses from the College of Arts and Sciences
- Analyzed the results of the course evaluation

## **Data Gathering & Analysis**

### Charge

The *Data Gathering & Analysis* team will look at all data that is available that is already being collected in the Libraries as well as data from the University that is available to the Libraries. The team will analyze the data to determine which data provides useful insights into how the USF community uses the Libraries as well as where USF and the academic departments currently stand and where they are moving towards in the future. The team will develop a report detailing the data available, which data was useful and what insights they learned from the data that will help inform how to structure a forward-looking liaison program.

### Team Highlights

- Created a list of 40 questions to guide their process
- Reviewed over 40 spreadsheets and 5 University strategic reports
- Cataloged data available from both the USF Libraries and USF
- Analyzed the data to determine which data would be useful for the Liaison Program, individual Liaison Librarians or both
- Provided summaries of data, including limitations and level of usefulness for the project

## **Models**

### Charge

The *Models for Liaison Programs* team will investigate different liaison models that are currently being used in institutions. The team will look at institutions with a similar librarian/student ratio to USF, as well as other institutions small and large. The team will develop a report detailing different liaison models that may work for USF, providing the strengths and weaknesses of each model. The team will ensure that succession planning is analyzed in the different models.

### Team Highlights

- Reviewed literature on liaison program models and implementations
- Developed list of libraries and a representative staff person at each library to interview
- Created questions to ask each library
- Team members interviewed at least one representative at 13 libraries
- Defined current models in use and their advantages and disadvantages
- Presented strengths and weaknesses of each library's implementation
- Developed list of challenges and lessons learned from other libraries' liaison programs

## SWOT

### Charge

The *SWOT Analysis of Current Program* team will analyze the current program, reviewing strengths, weaknesses, opportunities and threats. The team will develop a report detailing their findings and how those findings will help determine how to develop a new liaison program that supports USF now and in the future.

### Team Highlights

- Reviewed the current Liaison Program
- Developed measures for strengths, including a Skills Inventory, Subject Expertise Inventory and Liaison Self-Assessments
- Acknowledged areas of improvement for the Liaison Program
- Uncovered opportunities for the Liaison Program
- Identified challenges for the Liaison Program

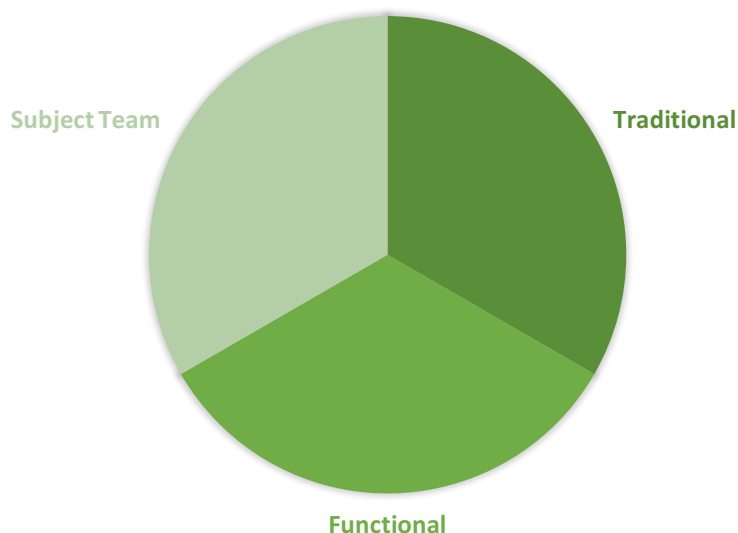
Each Team's final report can be found in *Appendices C-G*.

## The New Model

The current model of the USF Libraries Liaison program is traditional. The model at the Libraries was created decades ago when there was a very large Reference Services department with over 16 librarians and over 15 library school graduate assistants. Duties for “bibliographic instruction,” as requested by department faculty, were blended with reference desk and collection development assignments. Librarians were individually assigned to academic departments based on one or more factors: their interests, academic background, or relationship to a faculty member in the department (for example, several librarians became liaisons to departments where their spouses were department chairs). Over the last decade this model became unsustainable because of the loss of librarians due to retirements and budget constraints to cover over 62 academic departments. In addition, the Libraries’ approach to reference and instruction services had transformed to become more effective and efficient and apply current librarian faculty where they were most needed. While the Libraries recognized that the traditional model had provided a recognizable “face” to its thousands of faculty and students, the Liaison Program needed to be reassessed. The goals of the new model were to preserve the “high-touch” benefit of a traditional model and explore models which more effectively allowed librarians to meet the changing instructional and research needs of faculty and students.

After much investigation into the models, their implementation at other academic libraries and analysis of the strengths and weaknesses of our own program, the decision was made to take the best from each of the models under study. The new model for the Liaison Program will use the strengths of the three prevailing models detailed in the Models Team Final Report. The new model is a comprehensive program where Liaison Librarians are ambassadors to the USF community, meeting University goals and departmental research needs through collaboration within and external to the USF Libraries (see *Appendix H* for infographics). The new model is structured to be flexible, adaptable for the future and able to be assessed in parts.

### LIAISON PROGRAM



## Traditional

### Advantages: Traditional

- Departmental chairs, faculty, and students know the appropriate librarian with whom they communicate.
- Librarians can develop close working relationships with departmental chairs, faculty, and students.
- Librarians are able to gain a strong understanding of how research is conducted within the department and focus on understanding each department's curriculum.

The **Traditional** part of the model preserves the close relationships Liaison Librarians have developed with faculty and focuses on increasing relationships with the departments strategically. Liaison Librarians will still be designated for each department. There are some assignment changes to align librarians' subject expertise with departments and to resolve the specific issue of one Liaison Librarian assigned to 17 departments. Assignment changes will occur during the summer of 2017. The changes are as follows (a comprehensive list of liaison assignments can be found in *Appendix I*):

College	Department	Previous Liaison	New Liaison
CAS - School of Humanities	History	Andy	Tomaro
CAS - School of Social Sciences	Zimmerman School of Advertising and Mass Communications (Mass Communications)	Drew	Barb
CAS - School of Humanities	Communication	Drew	Kayt
CAS - School of Social Sciences	Zimmerman School of Advertising and Mass Communications (Advertising)	Drew	Nora
CAS - School of Social Sciences	School of Public Affairs	Drew	Susan S.
CAS - School of Social Sciences	SIGS - Government and International Studies	Drew	Susan S.
College of Engineering	Chemical & Biomedical Engineering	Matt T.	Drew
College of Engineering	Civil & Environmental Engineering	Matt T.	Drew
College of Engineering	Computer Science & Engineering	Matt T.	Drew
College of Engineering	Electrical Engineering	Matt T.	Drew
College of Engineering	Industrial & Management Systems Engineering	Matt T.	Drew
College of Engineering	Mechanical Engineering	Matt T.	Drew
College of Engineering	Medical Engineering	Matt T.	Drew
Muma College of Business	Information Systems Decision Sciences	Nora	Drew
College of Behavioral and Community Sciences	Communication Sciences & Disorders	Susan S.	Claudia

In the **Traditional** part of the model, some Liaison Librarians will also serve as liaisons to administrative units on campus, such as Career Services and Veteran Services. The Undergraduate Success Librarian is one such liaison, working with academic departments, but also working with several of the units in Student Affairs and Student Success. Details of administrative unit liaisons can be found in *Appendix J*.

## Functional

### Advantage: Functional

- Librarians can focus on developing their skills in a single functional area.

The **Functional** part of the model allows the USF Libraries to plan for the future to address the evolving nature of scholarship and research needs, by planning for the future and adding faculty lines to be funded within the Liaison Program.

New faculty lines are proposed for hybrid librarians with a combination of functional specialties in digital scholarship with liaison and subject experience. The new librarians will be paired with Liaison Librarians in strategic areas. These strategic pairs will be focused on specific colleges and departments.

The new positions within the Liaison Program will be titled *Informatics Librarians for <Discipline Area>*. An example job description for the position can be found in *Appendix K*.

The Steering Committee recommends that the Informatics Librarians should be placed in the Liaison Program. One of the lessons learned from the Models report was that when Liaison Librarians and functional specialists reported to different departments, communication and competing priorities were a constant issue. The Informatics Librarians are not just functional specialists. These librarians will have a blend of subject expertise and informatics expertise based upon their subject expertise. Since their priority will be to support a focused set of departments, these positions would benefit from working in the same directorate as the Liaison Librarians as their goals align, alleviating the issues seen in several implementations from different libraries.

Initially, three new faculty lines are proposed with a focus on Natural Sciences, Business and Anthropology/History. A chart with the proposed faculty lines follows on the next page.

## Strategic Pairs

### Liaison Librarians

### Informatics Librarians

#### Natural Sciences

Torrence



#### Informatics Librarian for Natural Sciences

Librarian with science subject expertise specialized in data management plans (especially for grants), metadata standards and data analysis.

#### Business

Wood



#### Informatics Librarian for Business

Librarian with business subject expertise specialized in statistical analysis, data management services and market research methods.

#### Anthropology & History

Taylor



#### Informatics Librarian for the Humanities and Social Sciences

Librarian with humanities and/or social sciences subject expertise specialized in digital research methods, such as data visualization and text mining.



## **Subject Team**

### Advantages: Subject Team

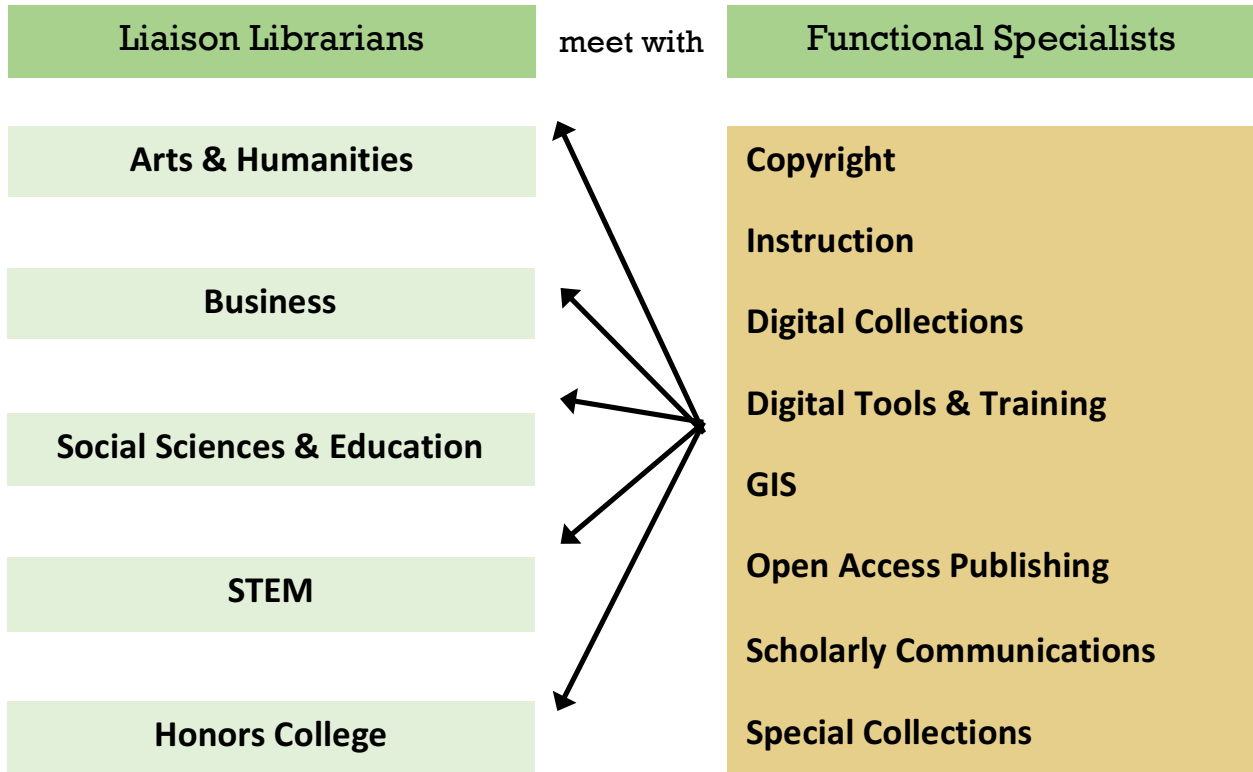
- The model helps to address situations where a Liaison Librarian is unavailable and a service needs to be provided by a backup librarian.
- Liaison Librarians may feel that they have colleagues handling similar disciplines with whom they can collaborate.
- Team model may better support interdisciplinary work among departments within a large and broad discipline, such as social sciences.

The **Subject Team** part of the model ensures that the Liaison Program is collaborating with functional specialists within the USF Libraries to effectively meet the research needs of the USF community. In the current environment, Liaison Librarians and functional specialists may work with the same departments and/or faculty, but they may be unaware of each other's activities. Subject Teams will help alleviate the issue of communication between Liaison Librarians and functional specialists. The Teams will also allow Liaison Librarians and functional specialists to plan each semester to maximize their efforts to support research and teaching at USF.

Subject Teams will be comprised of librarians supporting broad disciplines and the functional specialists who interact with those broad disciplines. Each team will meet at the beginning of the semester to share information about the departments within the broad discipline and plan activities for the department for the semester. The teams will meet as appropriate during the semester and at the end of the semester, the teams will review and assess the activities done during the semester in support of the departments.

The **Subject Team** part of the model follows:

## Subject Teams



## Management in the New Model

Librarians in Academic Services in the Liaison Program will report to either the AD for Instructional Services or the AD for Research Services. Depending on the blend of instruction and research activities of the liaison's departments, the liaison will report to the corresponding AD. For instance, if the liaison does more instructional activities with their departments, they will report to the AD for Instructional Services.

The recommended reporting lines are as follows:

### AD for Instructional Services

1. Katherine Ahnberg
2. Susan Ariew
3. Audrey Powers
4. Matt Torrence
5. Nora Wood

### AD for Research Services

1. Claudia Dold
2. Susan Silver
3. Drew Smith
4. Tomaro Taylor
5. Library Research Assistants
6. Future Informatics Librarian positions

## The Role of the Liaison Librarian

The role of the Liaison Librarian is to serve as an ambassador for the USF Libraries and all of its services and resources. Their primary duty is to work with their assigned departments to understand the department's culture, teaching and curriculum and their research environment. Once a Liaison Librarian gains an understanding of the department's research and teaching needs, they can provide instructional and research support services in addition to referring faculty and students to other functional specialists as needed. Liaison Librarians are the nexus of collaboration for the USF community and the USF Libraries.

It is the job of a functional specialist, such as the Digital Scholarship and Publishing Librarian, to understand their specialty and how it may apply to a wide variety of academic needs, while it is the job of a Liaison Librarian to understand the department and its research and teaching needs. It is similar to having a general practitioner (GP) for medical needs. The GP understands the patient and their concerns and refers the patient to the appropriate specialist to resolve the issue. Liaison Librarians' value is that they serve the department's needs and act as the conduit between the departments and the USF Libraries for specialized needs beyond their individual skills.

## Assessment in the New Model

The model was developed in three parts, which makes it easier to assess each part instead of the model as a whole. The assessment plan is as follows for each part of the model:

### **Traditional**

At the end of the 2017-2018 academic year, the Traditional part of the model should be assessed. The department should discuss the new assignments and this part of the model in group departmental meetings starting in May. A smaller subgroup of librarians should also meet to create a liaison self-assessment (similar to what was done in the SWOT Team) for liaisons to use to evaluate their experiences with new departments to determine what worked well and what may need to be improved.

### **Functional**

This part of the model should be assessed through the self-assessments of activity and impact on the assigned academic departments by both librarians in the Strategic Pairs. The Strategic Pairs will meet with the AD for Research Services at the end of each semester to determine what worked well and what may need to be improved.

### **Subject Team**

At the end of the Fall semester of the 2017-2018 academic year, the Liaison Librarians and functional specialists should meet to discuss how the process went for the semester and determine what worked well and what may need to be improved. Assessment should be built into the Subject Team process as part of its ongoing procedures.

## The Liaison Program Framework

One of the challenges to the current Liaison Program is the lack of an agreed upon set of liaison activities among the Liaison Librarians and between this group and Library Administration. Liaisons were not working from a commonly understood set of activities from which to communicate to department faculty. Often it was left up to the Liaison to determine their activities with the academic department with little oversight, guidance or mentorship. Department faculty did not understand what to expect from a Liaison Librarian in terms of skills and services.

To resolve this, the Steering Committee developed the Liaison Program Framework based on an assessment rubric in chapter two of the book *Assessing Liaison Librarians: Documenting Impact for Positive Change* and used it as a starting point. Different departments have different research and instruction needs and the framework was designed to be able to guide the program forward while maintaining flexibility for each liaison, depending upon their liaison assignments. The Liaison Program Framework will help the program develop and it will help individual liaisons to improve their skills to support the varied needs of different departments.

Using the original rubric from the book, the Committee re-categorized expectations, removed expectations that were not applicable for our USF Liaison Program and added additional, more relevant expectations for activities.

Liaison librarians were consulted and the final Framework can be found in *Appendix L*.

The Framework has six categories: Engagement, Research Services/Scholarly Communications, Instruction, Assessment, Collection Development and Professional Development. In each category, there are three columns:

Expectations	The skill or activity the Liaison Librarian is expected to perform
Role of Library Management/Administration	What library management will do to help Liaison Librarians perform the expectation
Individual Activities	Individual activities that Liaison Librarians can do to meet the expectation

The Framework will be used in several ways. It is important to note that the Framework is not intended as a checklist for Liaison Librarians to complete, nor is it expected that librarians should score a 5 out of 5 in every expectation during the performance evaluation period. It is understood that librarians will work towards excellence in the expectations, but in a manner that makes sense for each of the librarians on an individual basis.

First, the Framework will be used to guide the Libraries' Liaison Program towards its goals. Each semester, the librarians will meet to select a goal that every librarian will strive to meet. The librarians met in April 2017 and determined that the goal for both Summer and Fall 2017 semesters will be "1B: Conduct an environmental scan of assigned colleges and departments and develop user-centered strategy for engagement." It was agreed that in order to maximize our efforts to effectively meet the needs of the departments, we must first understand our departments and how they work.

Secondly, the Framework will be used by individual librarians to set goals for each semester for their liaison work. Each librarian will review the Framework and select which will be set forth as goals. Lastly, the Framework will be used to craft job descriptions and first-year plans when new Liaison Librarians are hired.

The Framework will also be the basis for the Liaison Toolkit.

## The Liaison Toolkit

In the work done for the Liaison Program Framework, it was noted that there were many different activities a Liaison Librarian could do to meet an expectation. For some expectations, the list could have been very long, resulting in an unwieldy Framework. As the Teams were working to complete their final reports, the creation of a toolkit was suggested by different groups for various areas, such as communication and assisting the USF faculty with tenure & promotion. The Steering Committee determined that one toolkit with multiple sections would be useful for Liaison Librarians for their work.

The Liaison Toolkit is meant to be a guide for various aspects of liaison work, from methods for marketing services to departments to effective instructional pedagogies to ways to improve subject expertise. The Steering Committee developed the outline for the Liaison Toolkit, found in *Appendix M*. As the different parts of the model and recommendations are implemented, the relevant parts of the toolkit should be developed. For example, since the current Liaison Program goal is to complete environmental scans, the Environmental Scan section of the Toolkit should be one of the first sections to be developed.



## Succession Planning

The Steering Committee recommends that the USF Libraries implement the succession planning method used by the UCF Libraries in the case of a librarian leaving or retiring. One of the Liaison Librarians is assigned to the departing librarian's departments shortly after it is known that the librarian is leaving. The departing librarian will train the proxy Liaison Librarian on each of their departments, the research and teaching needs of those departments and status of relationships built by the departing librarian. The proxy Liaison Librarian will serve on the search committee for the vacancy. Upon filling the position, the proxy Liaison Librarian will train the new hire on each of the departments, the researching and teaching needs of those departments and the status of relationships with the department.

## The Library Research Assistant Program

The Library Research Assistant Program (LRA) is a valuable part of the Liaison Program. The work done by LRAs allows librarians to have more time for their liaison responsibilities. LRAs provide basic and intermediate reference service at the Library Services Desk, which allows librarians to be on-call for advanced reference questions. LRAs work on the weekends and evenings, furthering the reach of Research Services, allowing librarians to be available during the week when faculty are more likely to be on campus.

LRAs also provide support to Liaisons and Research Services via project work. The LRA Program, despite its small number of student workers, has expanded its responsibilities in the last year. The LRAs have done significant work learning the LibGuides system and cleaning the assets database to prepare for the Metalib transition as well as preparing the data so that it can be reported on effectively. The LRAs have successfully started teaching the “Learning the Library” Library 101 workshop for the LILO workshops series. In the last year, their project work has been a strength for the program and below are some of the projects they have worked on:

- *ROLES data projects*
  - List of faculty and staff by department and college
  - List of master degree programs and degree requirements
  - Pilot project to test methodology and estimate time requirements for creating a list of faculty publications by faculty, department and college
- *Assets Database Project*
  - Identified links in LibGuides (over 8,000) in preparation for the Assets Database project from the LibGuides Committee.
  - LRAs were trained on using LibGuides and cleaned up the Assets database, merging over 4,000 records (each record required anywhere from 5 to 500 steps)
- Analysis of last three years of Research Consultation Request Wufoo forms
- Creation of a list of Centers, Institutes and Labs on campus

Increased funding of the LRA Program would give the librarians more time to focus on their liaison responsibilities and allow the Libraries to offer expanded research services, including longer hours at the Library Services Desk and evening and weekend chat hours. The LRAs would also be able to work on more projects to assist the Liaisons Librarians in their duties and assist the Liaison Program in meeting its goals.

## Recommendations

**Time Frame:** Academic Year 2017/2018

### Personnel

- A1. Create strategic pairs of Liaison Librarians in key strategic areas: Natural Sciences, Business and Anthropology/History. Hire three Liaison Librarians with strengths in data analysis, etc.:**
  - Informatics Librarian for Natural Sciences
  - Informatics Librarian for Business
  - Informatics Librarian for Humanities and Social Sciences
- A2. Expand the number of Library Research Assistants from four to 12.**
- A3. Re-align Liaison Librarian assignments to academic departments based on ROLES data and adjust supervisor as necessary.**

### New Liaison Model

- B1. Create a communication plan for the new tripartite model for the Liaison Program.**
- B2. Develop meeting schedule and goals for Liaison Librarians and Functional Specialists.**
- B3. Implement the use of the new Liaison Program Framework by liaisons to identify goals to improve performance.**

## Projects

### **C1. Environmental Scans**

As described above in the Liaison Program Framework section, liaison librarians will be trained to start conducting environmental scans. Environmental scans allow librarians to review the structure of a department, its communication styles, its research and teaching strengths, its demographics and more to help the liaison prepare approaches and strategies to working with the department in a way that is effective for that department. Training will be needed so that scans are conducted using the same methods and a way to capture the information that each liaison learns about the department needs to be developed. The LRAs will be available to assist with capturing demographic data for the project.

### **C2. Continuation of Syllabi Review**

Liaison librarians will use the syllabi assessment rubric developed by the Curriculum Team to determine where library research (as defined by the Curriculum Team's report) happens within a department's curriculum. This assessment will be used to help determine instructional goals for each department.

### **C3. Case Management Planning**

Case management planning is an important initiative at USF, helping the university to meet its 4-year graduation and FTIC retention rates. The AD for Research Services and the Undergraduate Success Librarian will be involved in assigning referrals from the case management system in Appian for research consultations to the appropriate librarians, as well as following up to ensure that the information from the consultation is entered into Appian.

### **C4. Publishing and Presentation Plan**

Under the direction of the AD for Research Services, librarians will meet to discuss which librarians will work on publishing which parts of the team projects they completed. It will be determined to what journals librarians will submit articles so that the group is not targeting just a few journals. The same will be done for conference presentations.

### **C5. Department Chair Interviews**

The information from the interviews with department chairs was insightful and very valuable for both the Liaison Program and individual liaisons. Due to scheduling conflicts, the list of interviews was unable to be completed. The Academic Needs Team will continue its work and interview department chairs to help the Liaison Program understand the research and teaching needs of the faculty.

## Liaison Toolkit

### **D1. The Liaison Toolkit will begin development.**

As described above in the *Liaison Toolkit* section, development of the toolkit should begin, starting with the Environmental Scan section. The Toolkit should be discussed in a departmental meeting to determine which section should be next, with volunteers solicited for the development of the next section.

## Marketing & Communications

### **E1. The Director of Academic Services and the AD for Research Services will work with the Dean of the Libraries and the AD of Communications, Marketing and Web Development to:**

**A. Develop a marketing plan to communicate liaison changes to affected departments for implementation for the Fall 2017 semester.**

**B. Develop an internal marketing plan.**

An internal marketing plan will be created to inform the other departments in the USF Libraries what is being changed as a result of the ROLES project, including new department assignments and recommendations.

**C. Develop quick and simple plans for face-to-face marketing.**

Elevator speeches and/or talking points will be developed to better articulate library resources and services to faculty when attending department events, talking with faculty in other meetings or running into faculty on campus. Faculty can be clear about our services if all liaisons are communicating similar messages.

**D. Include liaisons as stakeholders in messages sent to the faculty and USF community.**

Liaisons have well-developed relationships with their departments and often know the most effective ways to communicate with a department. However, these relationships and knowledge of how departments communicate has been overlooked when communications are sent from the Library to the faculty. Communications that affect liaisons have not been coordinated with the liaisons. Depending on the message, it may be more beneficial for the liaisons to send the message to the faculty. Going forward, communications that affect faculty and students should be a collaborative process that include the liaisons.

## Reference Services

### **F1. Library Research Assistants replace librarians at the Library Services Desk and in chat service.**

Librarians will need more time to work on expectations from the Liaison Program Framework as well as projects resulting from ROLES. Currently, librarians are assigned to the desk or local chat for reference for five or six hours weekly. Going forward, the LRAs will be responsible for desk reference. The LRAs are being trained starting June 2017 on chat reference and will staff expanded evening chat reference hours for the Fall semester. The level of difficulty for the majority of desk and local chat reference is low and can easily be handled by the LRAs.

If the LRA program is expanded, the AD for Research Services will investigate LRAs staffing chat reference during the day. LRAs will continue their current practice of referral to a liaison librarian when a question is beyond their capability. Librarians can still be called by the Library Services Desk or LRAs during working hours. Slack will be investigated as the messaging system for communication between the librarians and the Library Services Desk and LRAs. Librarians will continue to staff Academic Chat eight hours per week with the expectation that eight librarians will be assigned one hour of Academic Chat each.

## Metrics

### **G1. Identify methods for demonstrating impact.**

Demonstrating the impact of our services remains a priority. Librarians must continue work to determine how to communicate our impact and value for the USF community. The statistics from the Research Consultation Form and Library Engagement Form will be used to demonstrate qualitative impact, as will instructional data. Assessment methods to uncover information that the Liaison Program can use to tell the story of its impact should continue to be investigated.

### **G2. Investigate customer relationship management (CRM) systems.**

Currently, there is not a method for communicating our interactions with faculty and students so that each department in the Libraries has a holistic view of their work with faculty and students and liaisons can see all the ways their faculty interact with the Libraries beyond the work that is done by liaisons. In April 2017, the AD for Instructional Services and the AD for Research Services began work on integrating targeted research and instruction interactions with students in the Libraries with the Appian software the University has invested in for student relationship management.

The current work is passive, with data planning to be uploaded at the end of each semester. Moving forward, active CRM should be investigated. The Models Team final report indicated that CRM was a growing trend for libraries, with several libraries implementing systems for tracking interactions with faculty and students. The investigation into CRM will include discussion with those libraries to see how their implementations went. CRM for the Libraries would also possibly resolve some of the communication issues between departments in the Libraries.

## Outreach

### **H1. The Director of Academic Services will focus on developing a closer relationship with the Global Citizenship Project.**

Global Citizenship Project initiatives are an opportunity for liaison librarians to increase their skills in global awareness and research. Developing a closer working relationship with the offices that work with global citizenship may help create opportunities to further both the Libraries' goals and the University's goals to graduate "well-educated global citizens."

### **H2. Liaisons will coordinate with the departmental Outreach Committee to create events for faculty and students.**

Liaisons will conduct create targeted events for graduate students, faculty and departments in coordination with the departmental Outreach Committee. For example, the *Women's & Gender Studies Film Fest* was successful with connecting faculty and students in the WGS department with library resources and services. Additionally, the department was pleased with the number of non-WGS majors that were drawn to the event, which helped them to market their major and classes. Targeted events help a liaison to develop relationships with faculty and students in their departments, which helps them to have a deeper understanding of the needs of the department and faculty. This opens the way for more opportunities to promote their services in ways that respond to specific needs within the department.

Sometimes, a liaison's work with a department may create a great opportunity for the Libraries to partner with the department to sponsor an event. The Libraries would benefit from being involved in events that focus on student and faculty success, such as Academic Initiatives and its Faculty Fellows program in housing and residential education, New Student Connections, the Campus Conversation and events from ATLE, such as the ATLE Teaching Symposium. The Steering Team recommends that a fund for co-sponsored events be set aside to take advantage of such opportunities.

### **H4. The Liaison Program will work with Academic Resources on a collection management strategies and how to communicate those strategies to faculty.**

As collection management has changed over time, liaisons have not always communicated similar messages to faculty about collection management or they may have been reluctant to discuss the topic with their faculty. A well-defined collection management strategy can serve as a framework that synthesizes library strategic mission, collection management, technology-communication, collection management skills sets and library liaison practice and communication with faculty. The strategy would include information relating to professional responsibilities of librarians in relation to collections. The responsibilities would help define benchmarks for competencies and skills-sets needed for collection management practice. A better-defined collection management strategy would provide also provide a framework for more effective communication between library liaisons and departmental faculty.



## Project Management

- I1. The USF Libraries will use a single system for project management.**  
Currently, the USF Libraries use Basecamp, Trello and Asana for project management. The Steering Committee recommends that the Library Leadership Council discusses project management systems and selects one for the Libraries to use.

## Works Consulted

- Andrade, R., & Zaghoul, R. (2010). Restructuring liaison librarian teams at the University of Arizona Libraries, 2007-2009. *New Library World*, 111(7/8), 273-286.
- Arendt, J., & Lotts, M. (2012). What liaisons say about themselves and what faculty say about their liaisons, a US survey. *portal: Libraries and the Academy*, 12(2), 155-177.
- Brown, J. M., & Tucker, C. (2010). Using multiple data sources to develop a liaison agenda. *College & Undergraduate Libraries*, 17(4), 365-385.
- Carpan, C. (2011). The importance of library liaison programs. *College & Undergraduate Libraries*, 18(1), 104-110.
- Cooke, L., Norris, M., Busby, N., Page, T., Franklin, G., Gadd, E., & Young, H. (2011). Evaluating the impact of academic liaison librarians on their user community: A review and case study. *New Review of Academic Librarianship*, 17(1), 5-30.
- Cramer, S. M., Bernhardt, B. R., Crumpton, M. A., Harris, A. L., & Ryckman, N. B. (2012). Great expectations: New organizational models for overworked liaisons based on the UNCG Libraries Liaison Collections Responsibilities Task Force. In *Accentuate the positive: Charleston Conference Proceedings* (pp. 278-291).
- Crossno, J. E., DeShay, C. H., Huslig, M. A., Mayo, H. G., & Patridge, E. F. (2012). A case study: The evolution of a 'facilitator model' liaison program in an academic medical library. *Journal of the Medical Library Association*, 100(3), 171.
- Henry, J. (2012). Academic library liaison programs: Four case studies. *Library Review*, 61(7), 485-496.
- Jaguszewski, J., & Williams, K. (2013). *New roles for new times: Transforming liaison roles in research libraries*. Washington, DC: Association of Research Libraries.
- Kenney, A. R. (2015). From engaging liaison librarians to engaging communities. *College & Research Libraries*, 76(3), 386-391.
- Koffel, J., Magarrell, K., Raber, E., & Thormodson, K. (2013). Liaison connection: Building a better community. *College & Research Libraries News*, 74(10), 534-536.
- Mack, D. C., & White, G. W. (2014). *Assessing liaison librarians: Documenting impact for positive change*. Chicago, IL: Association of College and Research Libraries.

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.

Pasek, J. E. (2015). Organizing the liaison role: A concept map. *College & Research Libraries News*, 76(4), 202-205.

Miller, R. K., & Pressley, L. (2015). *SPEC Kit 349: Evolution of library liaisons*. Washington, DC: Association of Research Libraries.

Shreeves, E., Magarrell, K. L., Walton, L. J., & Barton, H. (2009). *Iowa Framework for Liaisons/Subject Librarians*. Iowa City, IA: The University of Iowa.

Tennant, M. R., Cataldo, T. T., Sherwill-Navarro, P., & Jesano, R. (2006). Evaluation of a liaison librarian program: Client and liaison perspectives. *Journal of the Medical Library Association*, 94(4), 402.

Williams, J., McCrillis, A., McGowan, R., Nicholson, J., Surkis, A., Thompson, H., & Vieira, D. (2014). Leveraging technology and staffing in developing a new liaison program. *Medical Reference Services Quarterly*, 33(2), 157-166.