

## Leaving Liaison Behind: Reflections on the Last Decade

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### Introduction

In 2008, the University of Guelph Library launched a review of its Academic Liaison program. The process began as a straightforward review of the liaison function, but we quickly realized that it was too difficult to isolate liaison activity from the rest of the library. Ultimately, it became clear that in order to review the work of liaison librarians, it was necessary to think about all of the processes and functions that make up the work of the library.

In the previous liaison structure, librarians provided a full range of library services to their assigned faculty and academic departments. Over time, librarians found that the range of responsibilities became increasingly complex, resulting in the common concern that every

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librarian was expected to do everything. Put another way, librarians felt like they had become “jacks of all trades and masters of none,” resulting in a wide but shallow focus.

Guelph’s liaison librarians reported directly to the head, Academic Liaison, but were also responsible to other functional managers, such as the head, Collections, and the head, Information Literacy, for components of their job. This reporting arrangement (also known as “matrix management”) made decision-making, priority-setting, and resource allocation more confusing. Individual librarians could complete small-scale initiatives,

but coordinating anything across the liaison team was a complex negotiation. The library was no longer well positioned to meet the changing needs of our constituents.

When reviewing the liaison program, it was necessary to confront our own notions and assumptions about librarian expertise. What expertise were we offering to campus? Was it important to our biology faculty for the liaison librarian to have a degree in biology? Did engineering students care if their liaison librarian was an engineer? Ultimately, it was concluded that the campus needs the functional expertise of librarians more than subject expertise. As a result, the library was reorganized into teams that emphasized the four primary librarian responsibilities: (1) collection development, (2) instruction and curriculum support, (3) information discovery and access, and (4) scholarly communication.

Guelph implemented its functional team model in the summer of 2009, re-assigning librarians to specific teams and aligning managers accordingly. A few adjustments to our structure have been made since then, but working in teams is still a fundamental part of working at Guelph. This article reflects on some of the benefits that were realized, some of the lessons learned, and some key questions that were asked along the way.

## **Benefits**

### *Collaborative Learning Environment*

The team structure allowed librarians to share their knowledge and expertise more easily. Over time, these internal “communities of practice” worked together to deepen their shared expertise and devise new strategies for approaching their work. Our Information Literacy team, for example, moved from sharing tips and tricks about instruction to identifying high-priority courses through a curriculum-mapping exercise; as a direct result, the team developed a coordinated

and sustainable strategy for integrating information literacy across campus. Assembling teams to focus on specific areas of expertise led to more innovative initiatives and shorter project completion times.

### *Exploration of Emerging Interests*

The new structure enabled librarians to explore emerging areas of librarianship. For example, the new model included a dedicated User Experience team, signaling the desire to look at services critically and a commitment to understanding the library from the user perspective. Similarly, the new structure afforded opportunities to grow the existing open access outreach strategy, evolve digital scholarship services, and build a sustainable pipeline for producing media content. Instead of relying on individual librarians to voluntarily take the lead in these emerging areas, teams were charged with the responsibility for initiatives that fell within their mandates.

### *Simplified Lines of Responsibility*

As described in the introduction, the previous matrix management model resulted in a situation in which librarians were responsible to different managers for different functions of their jobs. Prior to the change, a librarian making a collections decision was accountable to the head of Academic Liaison, but the decision-making authority rested with the head of Collections. The new model added clarity for both librarians and managers, ensuring that librarians reported to a single manager, and managers supervised a small group of librarians. In addition to rationalizing reporting lines, this arrangement makes it easier for teams to define shared goals and execute plans.

### *Sustainable Programs and Services*

Under the previous liaison structure, when individual librarians left their positions for other opportunities, essential skills and expertise were lost. Newly hired librarians were required to build faculty

relationships and develop their support programs from scratch. There was no incentive to share knowledge across the liaison team because it was assumed that subject expertise was the defining factor in the work of librarians; in other words, business and humanities librarians did not compare notes because it was not believed that they had anything in common. In the current team model, expertise is situated among team members, making it easier for librarians to share their workload or adjust responsibilities as needs arise. It is now possible to deliver sustainable programs, meet service-level expectations, and maintain momentum because sharing knowledge and expertise is a collective responsibility.

### *More Strategic Partnerships*

The new model signalled a move from “individual-to-individual” to “program-to-client group” activity. Instead of relying on liaison librarians to push library services through their personal campus networks, programs were developed and targeted at specific user groups. The new model also afforded the opportunity to explore strategic partnerships beyond the academic disciplines. For example, the library regularly works with other support units on campus, including student affairs, teaching and learning support, campus computing, graduate studies, and the research office. With enhanced focus on these alliances, it is possible for the library to play a more active role in contributing to larger campus initiatives.

## **Lessons Learned**

### *Training for Teamwork*

When the new model was implemented, training sessions were offered that focused on high-performing teams and the stages of team development (e.g., “forming, storming, norming, performing”). These sessions covered the general theory, but lacked an understanding of the local context. This new way of working simply did not come naturally

to all of the librarians who were accustomed to working independently. While the challenge of transitioning to team-based work was anticipated, we did not offer sustained or consistent conversations about what teamwork means at the library. If this process were to be repeated, more emphasis would be put on training librarians to work effectively in teams.

### *Decentralized Faculty Outreach*

Coordinating outreach efforts is more challenging in our new structure. For example, a faculty member might connect with an information literacy librarian about courses, a collections librarian about new electronic resources, and a research and scholarship librarian about research data management. External communications and faculty outreach strategies would need to change, but clear responsibility for such an important function in our new model was not assigned to a specific individual or team. Having identified this shortcoming, we continue to focus on coordinating outreach efforts and delivering consistent messaging.

### *Cross-functional Committees*

To avoid creating team silos a series of cross-functional committees were formed to tackle issues that were important to multiple teams (e.g., Web and Information Architecture, Evaluation and Assessment). These groups made sense in theory, but they were not effective in practice. These committees were assembled with a representative from each functional team, assuming that this would improve internal communication on key issues; however, the people at these tables did not have the expertise or authority to make decisions, so the committees were unable to address issues effectively.

### *Internal Staff Mobility*

Flexibility of roles was considered as we restructured the organization

so that librarians could move internally to other teams and pursue new opportunities; however, an effective mechanism for these types of staff transitions was not created. Rearranging librarians and librarian work required more time and effort than was anticipated. To compound matters, as the librarians settled into their functional teams, they deepened their expertise and became less likely to consider opportunities in other areas of the library.

### *Impact on Support Staff*

Since our organizational renewal began as an examination of librarian work, the subsequent effect of our new structure on support staff was not always considered. For example, when we created the Information Resources team, it was not fully considered how that change would affect our preexisting cataloging or acquisitions workflows. Similarly, a few units were left untouched during the reorganization (e.g., Library Information Technology Support), missing an opportunity to reposition these teams for the future.

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### **Key Questions**

Redesigning organizations requires acute attention to the design process itself. For example, the process employed included scoping the problem, surfacing assumptions about the work, identifying success criteria, evaluating the user experience, generating solutions, and anticipating constraints. The sections below outline some of the core questions that were used during our discussions.

#### *What Are We Trying to Build?*

This question clarifies the scope of the anticipated change, generates standard definitions and principles, and establishes early criteria for success. The ideas generated at this stage become touchstones to

return to throughout the design process and help avoid the problem of individual staff members holding different assumptions about the project.

### *What Do We Want to Retain?*

This question recognizes that there are successful elements in the current approach that the organization wants to preserve in the redesign. By starting with what is known and acknowledging what is working well, the library can prioritize what it values and bring focus to the design efforts.

### *What Is It Like to Be a Client?*

This question is essential to developing a solution that works for users—not just one that satisfies the organization’s preferences. By exploring this question, the library can discover “pain points” and suboptimal solutions in the user experience, and then work proactively to resolve them.

### *What Do We Need to Build?*

Once the organization has surfaced assumptions, committed to shared values, and identified user pain points, it can start to consider possibilities for a new model. The library might derive potential solutions from brainstorming, from investigating similar organizations, or from looking to adjacent sectors that have transferable approaches. The key is to measure all proposed solutions against pre-identified success criteria and select the most promising options.

### *What Are the Constraints to Implementation?*

It may be easy to describe the ideal solution, but, in reality, libraries have to keep the constraints of their local contexts in mind. Some options might be too expensive, some might require more staff than the

organization can support, some might require skills that are not easy to acquire, or some might require improvements to physical spaces that are infeasible. The goal with this question is to avoid selecting a solution that does not suit the context. The simple act of anticipating constraints encourages organizations to devise new solutions for overcoming them.

## Conclusion

Reimagining liaison work began nearly 10 years ago at the University of Guelph, resulting in a fundamental shift from liaison librarians to functional teams. The level of commitment required to sustain an organizational change of that magnitude should not be underestimated, and efforts continue to evolve the organization. In the years since its launch, an operational management group was created, units were reassigned to different strategic teams, and a variety of standing committees were launched. With each revision, iteration, and realignment, a little bit more is learned about what is required to meet the evolving needs of learners and researchers in our community. Moving to functional teams was a solution that suited the context at the time, but it was not solely about rearranging liaison librarians into teams. It was also about building an agile organization that can respond rapidly to changes in the environment.

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