Liaison Roles and Responsibilities

BASELINE STANDARDS FOR BIBLIOGRAPHER / FACULTY LIAISON

Faculty liaison activities represent an important component of the UCI Libraries' outreach, communications, and public relations efforts. As such, liaison activities and the following baseline standards rest on the following shared principles and assumptions:

- Bibliographers represent the UCI Libraries in their liaison activities.
- Bibliographers impart clear and accurate information about the UCI Libraries to faculty and others.
- Bibliographers bring information about schools, departments, and programs back to the libraries.
- Bibliographers have primary responsibility for sharing information and responding to queries about collection development and the management of the Libraries' collections.

Baseline standards represent liaison activities in which all bibliographers should engage, regardless of disciplinary differences among academic activities. In most instances, the standards can be met whether or not an individual faculty member is responsive to bibliographer requests for meetings or other consultation. The following, however, are not designed to be prescriptive; different situations dictate different responses. Rather, they are intended to serve as both general standards against which bibliographers might measure their level of liaison activity and as a checklist of possible liaison strategies.

1. Maintain current and accurate lists of faculty names, phone numbers, and e-mail addresses.

2. Keep current about the academic program, including curricular changes, new research initiatives, development efforts, computing trends, etc. When appropriate, bibliographers will share this information with colleagues, including the University Librarian, the AUL for Collections & Access Services, other AULs, the Development Director, and the pods.

3. Be aware of changes in faculty (arrivals, departures, visitors.)

4. Develop mechanisms for ongoing communication with faculty about library issues (e.g., collection development, special programs and projects, serial cancellations, CDL, etc.)

5. Develop a professional relationship with a contact person in the department (AA, secretary, faculty member, etc.) who can provide:

    - Information on incoming faculty and other academic appointees
    - Numbers of students and other relevant student demographic data

- Course syllabi
- Information on recruitment
- Information on department programmatic review cycles and activities.

6. Keep current on faculty research and publications using such resources as updated CV's, department or school publications, department web sites, etc.

7. Prepare faculty interview form on all incoming faculty, as well as on other faculty when the opportunity arises.

8. Develop and maintain an information packet for distribution to new faculty.

9. Maintain a list of graduate students (and their dissertation or research topics) working with faculty.

10. Develop a plan for establishing and maintaining a "presence" in the academic department.

College Liaison Librarians (approved by Z group 12/12/06)

Introduction: College liaison librarians provide traditional and innovative library services to the campus community primarily through working with students, faculty and staff in the colleges and departments.   The liaisons are expected to understand the information needs of the academic units with which they work and to represent those needs in appropriate forums within the library. At the same time, the liaisons are expected to be knowledgeable about library products and services so as to represent these effectively to students, faculty and other constituents.

The liaison librarians are expected to be informed about the Libraries' collections, services, policies and resources, interpreting and promoting these to faculty and students in the academic units. The liaisons are also expected to be knowledgeable about the nature of the teaching and research conducted by the academic units with which they work, particularly with regard to changes in pedagogy and scholarly communication within each discipline. Liaisons collaborate with teaching faculty to ensure that relevant information access skills and tools are incorporated into academic programs. The general responsibilities of this position will fall under the following areas: Collection Development, Instruction, Institutional Repositories and On-Site Services.

Collection Development: College liaison librarians are responsible within a college for a range of collection development activities associated with one or more subject areas. They arrange and monitor access to information resources that support the instructional and research missions of the colleges and departments with which they work. They work collaboratively with Collections and Contract Services in the Libraries on collection development issues and projects. These responsibilities include the following duties:

- Develop and maintain a comprehensive knowledge of information resources in subject areas within the scope of their assigned college.
- Monitor purchase plans and refine profiles as necessary. Initiate orders for materials not included on the purchase plans.
- Select, evaluate and monitor appropriate electronic and Web resources.
- Notify faculty in their assigned college about library services, materials of potential interest and issues concerning scholarly communication.
- Maintain an awareness of expenditures for library materials within the confines of budget guidelines.
- Participate in consortial projects for developing shared collections.
- Participate in the formulation of collection development policies.
- Collaborate with the library development officer, along with the colleges and other academic units, on increasing funding to enhance the library's access to information resources.
- Evaluate collection strengths and weaknesses.

Instruction: Working collaboratively with the Instruction Unit, college liaison librarians provide instruction in library resources to students, faculty and staff in assigned colleges and to members of the general campus community. This includes the following duties:

- Promote instruction in library resources to students and faculty in colleges, departments and other academic units.
- Deliver in-person instruction sessions to students in courses within assigned colleges.
- Deliver in-person instruction sessions for courses within the general campus community.
- Integrate information literacy standards into instruction sessions.
- Work with faculty to integrate information literacy standards into the curriculum for courses.
- Create appropriate Web-based subject resources for faculty, students and researchers.
- Incorporate appropriate technology, such as class research Web pages, tutorials or other tools, into instruction presentations for students, faculty and other audiences.
- Provide one-to-one research assistance to students and faculty from assigned colleges and departments.
- Assess librarian teaching and student learning in cooperation with the Instruction Group.
- Collaborate with the Instruction Design faculty member and the Research and Development Group to develop appropriate technology for subject specific instruction.
- Provide ongoing training in subject specific bibliographic tools to library staff, particularly those staffing service points.

Institutional Repositories: College liaison librarians will actively participate in identifying collections in their assigned colleges and departments that may be appropriate for inclusion in the institutional repository. Working collaboratively with personnel in the Digital Services Division, Outreach Librarians lend their expertise to planning, development, promotion, and evaluation of digital repository services. Specific responsibilities include:

- Work to identify potential digital projects and members of the campus community in the colleges and departments who would be interested in collaborating on such projects.
- Serve on task forces or matrix teams for specific digital projects as appropriate.
- Communicate digital project /institutional repository philosophies, news and opportunities to the colleges and departments with which they work.

- Promote the importance and uses of digital projects, particularly the institutional repository, to the university community.
- Assist in the design and development of user interfaces to digital collections.
- Provide input in the development of training, tools, service models, guidelines and policies for digital projects.
- Participate in the evaluation and assessment of digital projects as appropriate.

On-Site Services: College liaison librarians will provide expertise, both subject based and general, in meeting the information requirements of students, faculty, staff and community users. Specific duties include:

- Provide referral support for the information desk in areas of subject expertise.
- Provide general referral support for the information desk as appropriate.

Specific Assignments: The college liaison librarians will use this section to list individual assignments.

Research and Service: As faculty members, college liaison librarians are expected to perform in research and service as well as librarianship. Research and service expectations are covered in the tenure and promotion criteria.

EMORY
LIBRARIES

▪ Chemistry ▪ Math & Science Center
▪ Music & Media
▪ Special Collections & Archives ▪ Woodruff

Role of a Subject Liaison

The subject liaison is a multi-faceted role, the concept of which is rooted in an understanding of the current needs and future directions of academic departments or programs. As they constantly scan the environment surrounding the areas they support, subject liaisons apply what they learn to all relevant aspects of their jobs. Subject liaisons articulate a plan that includes existing and anticipated academic department and program needs and the actions that will meet those needs. They are the direct interface of the library to their academic department or program. They provide the collections needed through their participation on the Collection Management Team (CM), and they provide the services needed through participation on the Research and Instructional Services Team (RIS). Subject liaisons work closely with the leaders of both groups to assure delivery of needed collections and services. As core activities, subject liaisons:

- learn about and keep abreast of scholarship in the field(s) they support;
- learn about and keep abreast of Emory programs in the field(s) they support through a high level of contact with faculty, students, and staff, among other means;
- learn about and keep abreast of information resources relevant to the field(s) they support including what is available and how resources are produced and supplied;
- learn about, understand and keep abreast of users' behavior and attitudes in incorporating information resources in their work, teaching and study;
- participate actively in campus life.

An important aspect of the subject liaison role involves not only promoting the programs of Research and Instructional Services and Collection Management but all services that the library offers to academic departments and programs. Within the General Libraries, the subject liaison shares department and program needs with appropriate library teams beyond CM and RIS, and also with the Market Councils.

Every liaison shares a common goal: to articulate, anticipate, and meet academic department and program needs. Each liaison may find that needs vary between departments and programs, so that the emphasis needed to meet these needs may not be consistent across all departments and programs. In addition, needs may be seasonal or fluctuate from year to year. Successful subject liaisons use the facets of each role (outlined below) as a foundation to build a library program that meets the individual needs of a department or program.

The **collection manager facet** of the subject liaison role includes, for the subject area(s) supported, activities such as:

- evaluate and initiate purchase of new information resources;
- manage monetary allocations;
- communicate to faculty, staff, and students about the collection;
- assess collection strengths and weaknesses;
- document the state of collections and create strategies and plans for continuous improvement;
- participate in activities related to the overall work of the CM Team such as space management for physical collections, approval plan management, gift management, preservation efforts, etc.
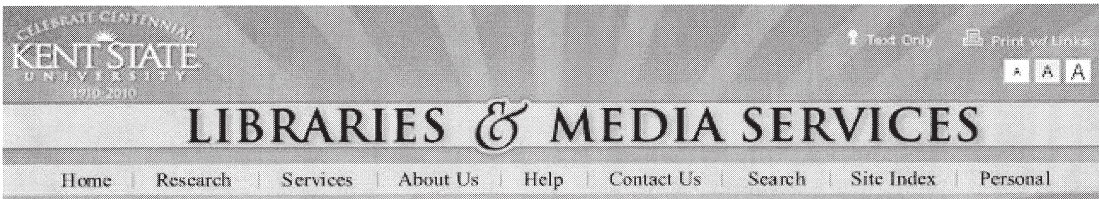
The **research and instructional services facet** of being a subject liaison includes activities such as:

- foster, promote, and be responsible for the delivery of library instruction for students and faculty within their supported subject area;
- create, develop, and manage user tools, such as web research guides, tutorials, and bibliographies as needed;
- provide specialized subject assistance in meeting information/research needs;
- provide training and continuing education for other staff members;
- collaborate with other liaisons to meet interdisciplinary information/research needs;
- participate in activities related to the overall work of the Research and Instructional Services Team, such as general orientations, workshops and tours, and creation of general tools such as tutorials, videos, and web pages.
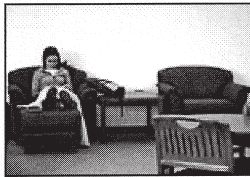
As members of the RIS and CM Teams and citizens of the library as a whole, subject liaisons collaborate:

- to meet the needs of subject areas which may not have the support of a specific subject liaison due to vacancies, staffing shortages, or the emergence of new areas of program emphasis.
- to meet demands that exceed staff resources assigned to any other subject area. This will at times require individual subject liaisons to work outside of their specific areas of subject expertise for the benefit of maintaining adequate levels of support for programs and services.

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ASK A LIBRARIAN

Collection Development

Liaison Librarians

Selection of Liaision Librarians

Liaison Appointments are made by the Dean of Libraries and Media Services. A librarian is asked to work with one or more academic units based on the following criteria:

- the librarian's educational experience
- the librarian's job-related duties
- the librarian's job-related workload
- the demands of an academic unit placed on the Libraries

In general, assignments are made to best match a librarian's expertise with a given academic unit. However, intervening variables may include changes in library staffing, a desire to maintain some level of continuity in liaison assignments, or the lack of required expertise among the Libraries' staff.

Role of Liaison Librarians

Liaison librarians are expected to establish and maintain regular and frequent contact with the academic units to which they are assigned. The foremost purpose of this relationship is to assist in effectively and appropriately expending an academic unit's library allocation. The liaison librarian's primary contacts should be the unit's library representative and the chair or director. Liaison librarians should attempt to keep academic units informed of the Libraries' policies and procedures.

A liaison librarian's responsibilities could include some of the following major activities: monitoring an academic unit's allocation; assisting library representatives with bibliographic verification, selection, and ordering; reviewing approval shipments, approval forms, Choice cards, publishers' catalogs and fliers, gift items, and damaged materials; collaborating with other liaisons in related disciplines; conducting informational sessions for members of academic units; and working with academic units on special projects, such as serials cancellations and/or ordering, remote storage selection, accreditation reviews where information about library resources is required, etc.

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Icon Legend/Key: ☐ Off-Site Link ☒ PDF File ✱ Required Form Field

http://www.lib.utk.edu/colldev/sl-role.html

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Role of Subject Librarian

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WHAT IS A SUBJECT LIBRARIAN?

A subject librarian is a library faculty member who has been formally assigned to be the primary contact person between the University Libraries and a particular academic group (department, college, school, center, program). This document describes the various functions a subject librarian may carry out, though a particular librarian's role will vary depending on the Libraries' resources and academic department's needs. The subject librarian is expected to understand the information needs and scholarly communication patterns of assigned disciplines. Using that knowledge subject librarians, communicate with their assigned UT groups in order to evaluate, develop, and provide appropriate library services and collections.

The essence of the subject librarian's role is to foster two-way communication between the libraries and the university's academic programs. Subject librarians accept responsibility to make themselves known and readily available to faculty and students. Each subject librarian functions as a member of a subject team and may call on resources and personnel within and outside the team when needed. Subject coordinators strive to have an overview of needs among faculty and students and work with subject librarians to negotiate activities they will carry out.

Communication between the subject librarian and the academic unit regularly occurs in a variety of ways, including through the designated library faculty representative or departmental library committee, by visits to individual faculty and groups, through printed and electronic channels, by periodic participation in faculty meetings, and by attendance at academic symposia and colloquia. Formal and informal on-site contacts outside the libraries are encouraged. Equally important communication occurs within the library, as subject librarians share information about departments with colleagues and in team meetings so that library policies, collections, resource allocations, and services are dynamic and respond to the interests and changing needs of the academic community.

WHAT ARE THE RESPONSIBILITIES OF THE SUBJECT LIBRARIAN?

Depending on the needs of faculty and students in particular departments or programs and the availability of a subject librarian's time and resources, the subject librarian provides many of the following services:

Liaison With Assigned Departments

> The overall responsibility lies in fostering a close relationship between the University Libraries and academic departments and programs to ensure that library resources are used most effectively in support of teaching, research, and service. More specific responsibilities include:

> Identify courses and programs in assigned departments that require information resources to support research. Work with faculty members responsible for these courses and programs to incorporate bibliographic instruction activities as appropriate.

> Work with faculty members to identify department expectations for student competencies and the role that the library might play in achieving them. When appropriate, seek opportunities to assist departments who are incorporating competencies in information gathering and analysis into their curricula.

> Identify patterns of faculty and graduate student research. Develop UT Libraries collections to facilitate research and take advantage of relationships with institutions in the Knoxville and East Tennessee area or the University of Tennessee system.

> Facilitate current awareness services for both faculty and students through appropriate activities.

> Provide support for program and accreditation review processes, new academic program establishment, and grant proposal preparation.

Participate in needs assessment activities such as conducting focus group sessions or surveys.

Collection Development and Management

The overall responsibility lies in making judgments about subject collections in the University Libraries which support teaching, research, and service missions of the University. Time spent participating in collection management work will vary with individual positions. Specific responsibilities for assigned subject areas include:

In consultation with appropriate faculty, develop and regularly update collection policy statements.

Review and prioritize orders submitted by faculty.

Review books received on approval plans in appropriate subject areas and make recommendations when needed in the subject profile.

Initiate orders for materials not received on approval plans.

Maintain ongoing review of serials subscriptions and options for alternative access.

Review gift materials.

Identify material for transfer, withdrawal, or conservation treatment.

Select, evaluate, and monitor Internet resources, and create appropriate subject pages for LibLink.

Evaluate collection strengths and weaknesses.

Monitor expenditures in assigned subject areas; stay within budget allocations in all categories including firm orders, periodicals, and approvals.

Work cooperatively with subject groups or other subject librarians to address to interdisciplinary needs.

Reference Services and Instruction

Subject librarians participate in a range of public service activities. Librarians perform some or all of the following services:

Provide services at public desks which may include telephone and electronic mail transactions.

Consult with students and faculty and provide advanced research assistance.

Develop guides to sources and services.

Participate in offering course-specific instruction to appropriate groups and classes.

Participate in mediated database searches, either as the primary searcher or as a consultant in the subject in cooperation with an experienced searcher.

Offer research counseling appointments for students and faculty members in assigned disciplines for extended assistance on research projects or papers.

last updated 7/25/97

The Task Force on the Public Service
Expectations of Library Liaisons
Report
August 2005

EXECUTIVE SUMMARY

The library liaison to academic departments and programs is a vital link in the chain of communication, services, and collections activity between the Libraries and its various user groups in the University community. The major areas of public service responsibility for liaisons are identified as collection development and management, reference & consultation, instruction, web development, and communication. While the report recognizes the diversity of subject specialties and their information needs, an incomplete and non-prescriptive discussion of best practices is offered from the Task Force's readings and consultations.

The single most important factor in a liaison's ability to perform these public service responsibilities effectively is establishing and maintaining personal contacts with faculty members, students, and staff of the academic departments and programs. Being visible in the department/program, determining communication methods that suit the preferences of individual departments/programs, involving faculty in important decisions regarding collections or library ambience, connecting faculty and departments with specialized services of the Libraries such as the University Archives or Digital Initiatives, and awareness of faculty scholarly interests is essential to build value and recognition of the Libraries among the faculty. Liaisons must work to gain the respect of faculty by demonstrating knowledge of current information resources and basic aspects of the field.

Additional recommendations in the report address:
- system wide coordination of the public service liaison role;
- evaluation of the liaison role in personnel processes;
- developing orientation and training materials for the various aspects of the liaison role;
- developing a web-based repository to pull together resources into a "Liaison Toolkit"; and
- marketing the library and liaison services to various user groups by the Libraries as a whole as well as by individual liaisons.

The nomenclature we use to identify the liaison role remains unclear both internally and to our primary users. Subject Librarian, Selector, Liaison are all terms used interchangeably during Task Force deliberations. For clarity of internal communications and for consistency of communications to our primary users the Task Force recommends that terminology be clarified and standardized so that it is the most descriptive without being unwieldy.

INTRODUCTION & COMMITTEE CHARGE

The Task Force on the Public Service Expectations of Library Liaisons (hereafter "Task Force") began its meetings in January 2005, and continued its work until June of the same year. Committee members included Jessica Albano, Linda Di Biase, Randy Hertzler, Alan Michelson, Theresa Mudrock, Carole Svensson, Martha Tucker and Anne Zald (chair).

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Paul Constantine, Associate Director of Libraries for Research and Instructional Services, charged the committee to establish "a set of expectations and guidelines for the public service roles and responsibilities of Liaisons." He continued, "These roles include, but are not limited to: reference, instruction, consultation, curricular development, participation in faculty research projects, and presence/participation in life of the academic unit, etc." To study these aspects of the liaison's role, he asked that the committee "consult widely within the Libraries and with users." Efforts have been made during the committee's tenure to assess systematically UW librarians' own perceptions of their roles and to determine the needs and expectations of faculty and students.

COMMITTEE PROCESS

Task Force members began by reviewing relevant material such as the internal document, "Role & Responsibilities Relating to Collection Development & Management" Draft April 1, 2003 (Appendix B), published articles and professional guidelines (Appendix C), as well as data from the 2004 Triennial Library User Survey (Appendix D). The Task Force conducted a survey of library liaisons to identify their public service activities and priorities (see Appendices E & F). Survey results were discussed with each fund group for clarification (see summary Appendix G). Task Force members attended a meeting of the Faculty Council on University Libraries to gather information about faculty perceptions of the liaison role. For additional information on the committee's activities, see Appendix A.

KEY FINDINGS FROM CONSULTATIONS

The March 2005 Public Services Liaison Survey was sent to the selector@lib list (109 list members, response from 65, response rate 59.6%). Survey results confirmed anecdotal information about the current and future priorities for the liaison role. There was strong alignment among the areas that liaisons report performing "on a regular basis" and the importance of those areas to the role of liaison. The highest rating was given, generally by the highest number of respondents, to the following areas of activity: reference & consultation services, collection development, instruction, web development, and communication (both to disseminate information about the libraries and to gather information about the academic department/ program). While agreement upon priorities for liaison responsibilities in five-year's time was less emphatic (48 respondents selected the highest scoring item collection development & management, in comparison with 65 respondents for previous questions) the areas of activity generally followed the same hierarchical order. The Task Force determined that other high scoring items on the survey are, in fact, methods of achieving these core responsibilities and can be considered as examples of best practices, e.g. attending library and disciplinary conferences, participating in the life of the academic department/program, library or disciplinary scholarship, advising on issues of scholarly communication, participation in the organization or preservation of digital scholarship, etc.

To share and discuss the survey results, Task Force members met with each of the fund groups. If one common thread could be identified in theses discussions it is that there is no "one size fits all" model. The over-riding commonality among the disciplinary areas represented by the fund groups is that personal contact is the most consistent factor to the effectiveness of the liaison role. How that contact is achieved and sustained varies widely from coordinated PR campaigns to informal interpersonal contacts, from instruction-centered to collection-focused interactions. These discussions elicited a great deal of information which is reflected, in part, in the best practices portion of this report. A more complete thematic summary of these discussions is provided in Appendix G.

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RECOMMENDATIONS: LIAISON ROLES & RESPONSIBILITIES RELATING TO PUBLIC SERVICES

The subject liaison is responsible for a number of public service activities designed to best meet the needs of his or her primary user group (usually the faculty and students of a given school, department or program). We recognize that the specific nature of the public service role will differ from liaison to liaison given differences in individuals' position responsibilities as well as the size, culture, and needs of the academic departments/programs. The liaison's public service role is comprised of five interrelated responsibilities: collection development, reference and consultations, instruction, web development, and communications. Examples of the specific duties in each of these responsibilities are provided below. The examples provided here are not prescriptive, nor do they represent a complete listing of the possible elaborations of each area of responsibility.

Collection Development

The subject liaison usually has responsibility for collection development and management (exceptions are primarily in the Health Sciences Library) and those responsibilities have been previously described (see Appendix B). In their survey responses liaisons ranked collections among the most important aspect of their public service responsibilities. Collections are, for many of our users, a primary linkage to the Libraries; therefore the public service responsibilities of the liaison in relation to collections are vital. Ongoing communication between the liaison and academic departments/programs ensures that collection development policies are continually aligned with the research and teaching interests of the faculty and also serves to inform review of approval plans, selection of materials in all formats, and interactions with donors. Building collections, whether print or digital, of appropriate departmental materials such as working papers, preprint collections, award-winning student work, digital scholarship, primary research data, etc. is another important role the liaison can play. By connecting departments or individual faculty with appropriate library departments or staff, we can ensure that these materials benefit from the Libraries' expertise with organization, access, and preservation.

Reference & Consultations

Reference is a vital professional service that connects users with knowledge and draws upon the subject expertise of the liaison. It also serves to inform the liaison of how the collections are being used and by whom. The subject liaison has responsibility for providing specialized reference help for those conducting research in their subject area(s). This may include providing reference assistance at a public service desk, via email or chat, or providing individual consultations by appointment.

Instruction

The subject liaison should be familiar with the curricula and the learning objectives of the academic departments and programs within his or her responsibility. The subject liaison is responsible for providing instruction in the information research methods and tools of the discipline. This may include course-integrated library workshops, credit-bearing classes, or individualized instruction (see Reference & Consultations), consultations with faculty on assignment or course design, and the integration of information literacy learning outcomes into departmental curricula. Liaisons may also play a role in faculty development with regard to evolving information resources, information management tools, and other information services.

Web Development

The subject liaison has responsibility for creating and maintaining the subject-related pages on the UW Libraries' web site, using style and format as recommended by the Web Steering

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Committee and the Browse-able Resource Discovery Group. This includes maintaining the intellectual content on the subject resource page and making available the liaison's contact information. Additionally, this may also include creating course-related resource pages or other pages dealing with the discipline.

Communication

The subject liaison has the responsibility for communication both within and outside the Libraries. Within the Libraries specific communication duties include (but are not limited to): participating in fund group and other collections-related meetings; sharing information about interdisciplinary resources; participating in reviews of electronic resources relevant to the subject; sharing successful strategies for building effective liaison relations in any or all of these areas; participating in the teaching and learning culture of the Libraries by sharing instructional strategies and materials and/or providing peer feedback for instructional skill development; and sharing information about departmental and disciplinary uses of and needs for information resources. Outside the Libraries specific communication duties include (but are not limited to): notifying departments of new resources and library policies; connecting individual faculty, academic departments, or student groups with library services and departments such as E-Reserves, University Archives, Digital Initiatives, etc.; consulting faculty about serials cancellation; regularly gathering information from faculty (whether formally or informally) about their scholarly and professional pursuits, including teaching and research interests, editorial offices held, grants received, departmental information service needs, etc.; responding to faculty and student research and operational queries; and presenting on issues such as scholarly communication at faculty meetings.

BEST PRACTICES FOR LIAISON PUBLIC SERVICE ROLES & RESPONSIBILITIES

The most important factor by far in a liaison's ability to perform his or her public service responsibilities effectively is establishing and maintaining personal contacts with faculty members and staff of the academic departments and programs. How this is done will vary depending upon the preferences and creativity of the liaison as well as the culture of the academic department/program and the habits of individual faculty members. Following is a compilation of recommended "best practices" for the consideration, adaptation, and elaboration of individual liaisons.

Establish Ongoing, Two-Way Flow of Communication with the Department

- Use Email strategically. Some academic departments have a faculty email list but its effectiveness for liaison communications will depend upon who has permission to post messages and individual faculty habits of reading email. Some liaisons have found that addressing an email to themselves and using the BCC field for the departmental address can be more effective since when the message is received it appears to come to an individual, not to a group, address.
- Create newsletters and new book lists as a means of sharing good news from the Libraries about services, facilities, and collections.
- Present at departmental meetings to promote library services, resources, or topical issues such as scholarly communication, Digital Initiatives, DSpace, etc. Staff from relevant library departments or committees may be available to partner in such presentations.
- Provide the collection development policy as a link from the appropriate subject resources web page and/or the liaison's web page.
- Identify, or work with department/program chairs to appoint, faculty members to serve as department/program liaison to the Libraries. These people can be an important touchstone for gathering information about the department and may be of assistance with disseminating

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information to their colleagues. Some librarian liaisons work with a department/program library committee.

- Track significant departmental initiatives, e.g. working papers series, preprints collections, student projects, awards, etc. which may be appropriate for organization or preservation through ContentDM, DSpace or other efforts underway in Digital Initiatives.

Establish ongoing methods of collecting information about individual faculty and department/program activities using direct and unobtrusive methods.

- Unobtrusive methods include regular review of department/program, faculty, and course websites; faculty curriculum vitae; faculty and department/program publications, etc.; Ask to be added to departmental mailing lists (electronic or paper) where appropriate and feasible.
- Direct methods may include judicious use of survey questionnaires to collect feedback; conduct scripted interviews or focus groups to elicit contextual and qualitative information to inform interpretation of triennial survey results; make individual contacts with faculty members to update knowledge of research and teaching interests, research methods, resource needs, editorial commitments, professional service commitments (grant review boards, association offices, etc).
- While time constraints of both the faculty and the librarian will prohibit annual meetings with all department members, meeting with some faculty each year could be manageable.
- Track the retirement or relocation of faculty members and notify the University Archives for the transfer of appropriate papers and research materials.

Get Out of the Library
We can learn a great deal from our colleagues working in branch library locations who have the physical proximity to their users which breeds familiarity and interaction on a wide array of issues.

- Maintain Office Hours – some liaisons have regularly scheduled time each week that they spend in the academic department. While the experience has not necessarily resulted with being inundated by individual students or faculty seeking assistance, there are other ways to use the time other than waiting, i.e. walking the halls, checking in with office staff, and doing other work in a departmental office or lab space.
- Take Part in Departmental Activities – attendance at departmental events, e.g. candidate interviews, colloquia, guest speakers, student showcase programs, disciplinary conferences, are opportunities both to gather information about the department and to nurture personal contacts with faculty and graduate students. Identifying oneself as a participant in the department is an important component of faculty recognition of the liaison role.

Marketing the Libraries and Liaison Services
Marketing efforts by the Libraries as a whole must be ongoing and reinforced through individual actions by liaisons with particular user groups. Resources (money or in-kind items) made available for use by liaisons and other library staff will improve the Libraries' visibility and serve as tools to supplement communication efforts.

- Active participation in the Faculty Fellows program each fall introduces new faculty to their liaison librarian and to the Libraries. Introduction of the $100 book voucher in 2004 encouraging new faculty to recommend purchase of any library material is one example of resources to support marketing library and liaison services.
- The preservation mug program is another example of resources devoted to promoting the library in creative ways.
- Some liaisons currently purchase bookmarks, affix personal contact information to them using labels, and then mail them to their faculty each fall. If the Libraries would make available to liaisons items such as cards with the library image on them for informal

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correspondence, or library logo items such as magnets, mugs, bookmarks, or pens/pencils these could provide ongoing placement of the Libraries in our users' daily lives.
- Connect specific library services and staff with academic departments or individual faculty as appropriate to their research, teaching, or publishing activities, e.g. Digital Initiatives (ContentDM, DSpace), University Archives, E-Reserves, etc.

IMPLEMENTATION OF TASK FORCE RECOMMENDATIONS

Coordination of the Public Services Liaison Role
A coordinated approach that takes into account the full range of liaison responsibilities is essential in implementing the recommendations of this Task Force. With its stated mission of "assist[ing] in the further integration of information/knowledge resources and user services", the Information Resources Council (IRC) may be responsible for the public services aspects of the collection development role. The Associate Director for Research & Instructional Services retains ultimate authority for the coordination of the public services role of liaisons. Further discussion is necessary to achieve a comprehensive approach to liaison training and support. In addition to the all-selector meetings which have been conducted under the auspices of IRC, another venue for sharing strategies for effective public service by liaisons is the monthly Public Services Forums.

Liaison Evaluation, Orientation, and Training
Evaluation of liaison performance is inconsistent in personnel processes. This may be, in part, due to inconsistency in the definition of liaison responsibilities. Each liaison should clarify in writing as an addendum to their position description, with their supervisors and/or fund group manager, their specific responsibilities from among those noted in this document and the companion document on collection responsibilities. Each liaison can then establish specific and relevant goals for these responsibilities as part of their annual review.

Orientation and training for new hires or those new to liaison responsibilities is spotty at best for collection development and management, and nearly non-existent for public service components of liaison responsibilities. Delegation of the development of orientation and training materials for the various liaison areas of responsibility, in both collection development and public service arenas, should be an initial and ongoing project of a committee drawn from the liaison roster and reporting to the IRC and/or RISG.

Liaison Toolkit
The committee also sought information about what resources would assist the liaisons in performing their public service responsibilities. The notion of a web-based "Liaison Toolkit" which could grow incrementally through collaborative effort, and coordinated by a committee charged with liaison training, surfaced in our discussions. Possible elements of a Liaison Toolkit might include:

Available Now:
- UW Libraries Faculty Handbook - http://www.lib.washington.edu/about/faculty04.pdf
- Libraries Assessment data – prepared and disseminated by the Assessment Committee http://www.lib.washington.edu/assessment/
- Scholarly Communications resources – compiled by the Scholarly Communications Committee http://www.lib.washington.edu/scholcomm/
- Selector/Liaison section of the CMS website http://staffweb.lib.washington.edu/Cms/
- Innovative/Millenium training, e.g Create Lists

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- Workflow for Digitization Projects: Liaison Responsibilities – http://digital.lib.washington.edu/sv/Liaison_Workflow.htm
- ContentDM or DSpace? – http://digital.lib.washington.edu/sv/CdmoreDSpace.html
- Instructional support materials including
  - *The Quick Guide To Teaching Resources for UW Librarians* prepared by the Information Literacy Steering Committee - http://staffweb.lib.washington.edu/InfoLit/Guide/
  - Research 101 and UWILL - http://www.lib.washington.edu/uwill/
  - CIDR Resources, Consulting, etc. - http://depts.washington.edu/cidrweb/index.html
  - Catalyst instructional materials for technology tools - http://catalyst.washington.edu/home.html

Not Yet Available (or inconsistently available):
- Web development tools
  - A wizard or templates for subject and/or class web pages.
  - Access to web editing software.
  - Training (available from C&C or CTLT – promote in the liaison context more effectively).
- Training on how liaisons might mine the Libraries' Assessment data to identify service or collection improvements to specific departments/programs.
- Repository for training materials
  - Training materials that address collection development and management component of liaison responsibilities
  - Means for sharing and elaborating upon best practices for public services responsibilities of liaisons
- A forum for highlighting successful liaison public service strategies or tools for use or adaptation in other areas.
- Resources, whether financial or in the form of useful objects, for marketing the Libraries and 'brand placement'.

QUESTIONS REMAINING

What's in a Name?
Many terms are used to designate this role. *Liaison*, *Subject Librarian*, and *Selector* are terms the Task Force has used interchangeably throughout our deliberations. In reviewing triennial survey data and in conversations with the Faculty Council on University Libraries, it remains unclear whether any of these terms communicate the service orientation of this role to our primary users. While communications with external audiences may always use locally relevant terminology, clarification of terminology within the Libraries through a broad discussion between the Libraries Administration and those functioning in this role would be beneficial.

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" myLibrarians" Liaison Program Charge for Pilot Project

This program would put into place an organizational structure that would reflect the organizational structure of the UW-Madison. Its purpose would be to strengthen the relationship between users and libraries by providing them with information and services that would be tailored to their interests and needs as students and faculty within an academic department or program.

The "myLibrarians" program would be a way to formally strength the connections between students, researchers, and faculty and library resources, services, and staff. A team of two librarians would be assigned to serve as "myLibrarians" for an academic department or program. These librarians would include a public services librarian and the collection development librarian for that department or program. As the library liaison team for an assigned department or program, they would serve as the personal gateway for all library-related questions and concerns of faculty, staff, and students within that department or program.

· Liaison activities would include the following: Ongoing assessment of departmental needs related to library services and resources.· The development and implementation of a plan to promote library services and resources regularly within each department or program. Emphasis should be given to establishing ways for regular face-to-face, in person communication with faculty and students within a department or program.· Provision of public services (e.g., reference, instruction, document delivery, ILL, etc.) to each department or program, including referrals to existing services.· Assessing and responding to collection needs of the department. · Working collaboratively with faculty in each department or program to provide information literacy instruction for majors and graduates in that department or program.

Immediate Goals:

1. Develop a pilot "myLibrarians" program working with a number of targeted departments or programs. The pilot would be a one-year project that would develop a model that could be expanded to include all departmental liaisons once the bugs are worked out and the infrastructure and customizable resources (e.g., communication mechanisms, instructional materials, assessment mechanisms) have been developed.

2. Library staff should be assigned to specific academic departments or programs. Once in place, each assigned librarian would be one of the "myLibrarians" for that department or program.

3. As part of the pilot, "myLibrarians" teams will create and share with other teams options for doing ongoing assessment of departmental needs related to

library services and resources. They also will develop mechanisms for periodically soliciting feedback from the departments on the effectiveness of the "myLibrarians" project in meeting departmental needs.

4. As part of the pilot, "myLibrarians" teams will create and share with other teams options for regularly promoting new library resources, changes in library policies and services, etc. to students and faculty within the department or program. Special emphasis would be given to creating options for regular in-person communication with students and faculty within the department or program.

5. As part of the pilot, "myLibrarians" teams will create and share with other teams options for regularly providing public services (e.g., reference, instruction, document delivery, ILL, etc.), including referrals to existing services, to students and faculty within the department or program.

6. As part of the pilot, "myLibrarians" teams will serve as information literacy advocates within the department or program and collaborate with faculty and administrators to ensure that their majors and graduates learn how to find, evaluate, manage and use information within the context of their discipline.

7. As part of the pilot, "myLibrarians" teams will create and share with other teams options for responding to the resource needs of students and faculty within the department or program.

8. As part of the pilot, "myLibrarians teams will assess the "myLibrarians" model in terms of both costs and benefits. As part of that assessment, the teams will make recommendations regarding where the model is most successful and where it might be used most effectively if the program were to be expanded.

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