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In This Issue

What Are We Trying to Build?

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This compilation of articles brings together ideas on the changing roles and opportunities for academic library liaisons with faculty. Five institutions share their reorganizations and redefinitions of what it means to be a liaison in today's research library in this issue of *Research Library Issues* (*RLI*). There are many commonalities across the five approaches, as well as differences based on the different contexts at the Massachusetts Institute of Technology; the University of California (UC), Riverside; the University of Guelph; the University of South Florida; and the University of Texas (UT) at Austin.

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Much has been written in recent years about the role of the library liaison.[1] The value of this particular aggregation of articles is that these institutions have shared the outcomes of some of the changes made to liaison work over the last decade, in the case of Guelph, and over shorter time periods for the other institutions. The articles reflect on not only what work liaisons are doing, but **how** that work is done. Guelph structured their reorganization of liaison work around the question, "What are we trying to build?" This is an excellent place for all of us to start as we think about the value and future of the work liaisons do on our campuses.

To begin with commonalities among the approaches contained in this issue, it is clear that values are critical to all institutions reconsidering liaison work. For the Massachusetts Institute of Technology (MIT), values are at the heart of the work they are doing. Values of openness, social justice, and diversity and inclusion are the cornerstone of the MIT approach, or as the article states, MIT Libraries "are determined to help reshape the information ecosystem so that it fosters, rather than hinders, our planet's urgent needs for expanded and inclusive education, research, access to information, and publishing—inclusiveness that accurately reflects and involves the many voices and perspectives on the human condition."

All five institutions are striving for a rebalance of activities done by liaisons to ensure that duties and responsibilities for liaisons are not just additive. As new spheres of activity emerge on our campuses, how can we ensure that we keep up without overburdening liaison staff? For Guelph, as the research needs of campus increasingly put demands on library staff or the "librarian was expected to do everything," the library needed to determine what could be given up and how to reorganize the work of liaisons. Guelph moved away from a subject liaison model in which the staff was organized by departmental and subject liaisons because this model meant they were organized to do the small stuff, not the big. In other words, "individual librarians could complete small-scale initiatives, but coordinating anything across the liaison team was a complex negotiation."

Alignment with campus priorities and efforts to, in the words of the University of South Florida article, "more effectively support the research and teaching mission of the university" is also a thread that connects these five approaches. It is clear that finding ways to support campus efforts is an area of opportunity for liaisons. For UC Riverside, this opportunity presented itself in their strategic planning process in which they identified "the needs of campus stakeholders, to develop vision and goals, and to create a road map to ensure that we continue to meet and anticipate the campus curricular and research needs." This focus on strategic alignment is not only valuable for rethinking liaison work, but also for ensuring the library is part of collective problem-solving in our institutions.

A 2016 study of library directors by Ithaka S+R noted that since 2013 there have been:

> …notable declines in the share of respondents [library directors] who agree that they and their supervisor [provost or dean] share the same vision for the library…a strong indication of the perceived division between library leadership and leadership elsewhere in the institution….[2]

This study highlights an apparent disconnect between what university administrators think about the role of the library and library staff within an institution and what library directors think about their role. However, the study found that when a library had engaged in strategic planning, the library was more apt to be in alignment with its institution's administrative leadership. Many of the institutions represented in this issue of *RLI* used their own strategic planning process as a foundation for rethinking the work of liaisons. For UT Austin, campus alignment is at the center of their reorganization. Their new overarching organizational structure is called the Academic Engagement division and consists of Teaching and Learning Services, Research Support and Digital Initiatives, and Scholarly Resources.

To the question of how we do the work we do, several institutions discuss training in this issue of *RLI*. Training comes in many forms and for much of the last decade, training for liaisons has been skill-based. We identify the new work of libraries, such as digital scholarship, copyright education, data management, project management, etc., and then offer skill-based training sessions. In an attempt to rebalance the work we do in moving away from some services, such as in-person reference or discretionary collection development, we make way for new work through skill-based training. What is innovative about some of the approaches outlined in this issue is the focus on building metacognitive skills rather than just job-based skills. This is most strongly illustrated in the work that Guelph is doing on learning to function as a team. Guelph staff have been organized into teams to enable speed and agility. They use a team development model created by Bruce Tuckman: the "forming, storming, norming, and performing" model.[3] In essence, Guelph has identified that to work differently we have to develop new habits of mind and learn to learn in new ways. This is a larger systems-based approach rather than an individual development approach. Focusing on working as a team asks liaisons to consider how their success is dependent upon interpersonal skills as well as knowledge.

One of the major differences seen across these five articles is the role of disciplinary subject expertise. For the University of South Florida, their approach combining what they call the three prevailing models—traditional, functional, and subjects teams—is built on the idea of "research platform teams" supporting specific disciplines. The teams are comprised of subject librarians with master's degrees in the target disciplines, functional specialists such as GIS librarians, and staff supporting collection building. Working closely with faculty in academic departments and schools, a team has been formed to support the School of Geoscience, for example. For this institution, subject expertise remains at the center of their approach and organization. For institutions such as Guelph, MIT, UC Riverside, and UT Austin, subject expertise is either replaced or supplemented by functional expertise.

> "Together these articles offer a road map or possible futures for institutions considering change in the area of liaison."

Additionally, the MIT model, unlike the others, acknowledges changes in liaison work that account for a more active, participatory user. Libraries are now both educating users in the digital age and amplifying the work and creations of users. Users engage in creating products and scholarship in library makerspaces, in library-based journal publishing programs, and in other innovation and experimentation activities hosted by the library. The MIT model argues for a more expansive and global definition of users—not just as consumers but producers, makers, and creators.

All articles in this issue share a focus on defining values, ensuring that the library is meeting the current and emerging needs of campus, and engaging in innovative pedagogy supporting the library's role in the educational enterprise. Together these articles offer a road map or possible futures for institutions considering change in the area of liaison.

Endnotes

1. See Rita Vine's "Selected Bibliography on Library Liaisons" on pages 76–79 of this issue of *RLI*, https://doi.org/10.29242/rli.294.7.
2. Christine Wolff-Eisenberg, "US Library Survey 2016," Ithaka S+R, April 3, 2017, https://doi.org/10.18665/sr.303066.
3. Bruce W. Tuckman, "Developmental Sequence in Small Groups," *Psychological Bulletin* 63, no. 6 (1965): 384–399, http://dx.doi.org/10.1037/h0022100.

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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 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.

> "...it was necessary to confront our own notions and assumptions about librarian expertise."

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.

"Redesigning organizations requires acute attention to the design process itself."

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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MIT Libraries Liaison Program: A Paradigm Shift

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The information ecosystem in which research, scholarship, teaching, and learning unfold has been fundamentally disrupted by digital technologies. At the same time, urgent global challenges propel innovations in research methods and spur progress toward universal, global education. In a knowledge economy, solving global problems, translating research results into practice, and achieving universal global education all take place within the disrupted, rapidly evolving information ecosystem.

The MIT Libraries stand with other mission-driven social institutions at the center of this transition—aiming to guide future development of scholarly communications and the broader information ecosystem based on principles of openness, social justice, diversity, and inclusion. We are determined to help reshape the information ecosystem so that it fosters, rather than hinders, our planet's urgent needs for expanded and inclusive education, research, access to information, and publishing—inclusiveness that accurately reflects and involves the many voices and perspectives on the human condition.

> "The MIT liaison program is initiating a paradigm shift..."

To help shape the new information ecosystem, the MIT Libraries envisions "a world where enduring, abundant, equitable, and meaningful access to information serves to empower and inspire humanity."[1] Both the MIT Libraries' strategic priorities and the recommendations in the Future of Libraries Task Force report[2] identify future directions:

- the development of globally interoperable knowledge platforms;
- re-thinking library collections and scholarly communications;
- new kinds of collaboration and partnerships in support of digital scholarship;
- addressing grand challenges through research in scholarly communications and information science; and
- promoting teaching and learning that support the MIT community in both navigating as well as influencing the information ecosystem.

The MIT liaison program is initiating a paradigm shift in response to both the external forces changing research, scholarship, and teaching and learning, as well as the directions set for the MIT Libraries by the Future of Libraries Task Force report.

We will need to change much of what we do and how we do it. Across the MIT Libraries, the changes in one department or unit will both affect and be affected by changes happening in other units. Synchronizing with others and ensuring resources for this collective change is a core part of the paradigm shift in the liaison program.

Our paradigm shift is a work-in-progress, and this paper describes our thinking so far.

What Does and What Doesn't Change

Liaisons—because of their subject expertise, relationships, and institutional knowledge—play a crucial role in advancing the MIT teaching, research, and learning mission overall. Those core functions will remain, as will the central tenet of liaison work: to make information and knowledge usable.

The paradigm shift in these core functions comes from a new understanding of what it is for information and knowledge to be optimally usable in a digitally networked world. Many of our current services were designed around a print paradigm, and need to be redesigned in light of changing contexts.

The paradigm shift also comes from considering who the usable information is for—global social justice demands that we think differently than we have in the past about the people who create, share, and use knowledge and information.

Discovery services provide a good example. Discovery, as all liaisons know, is mighty challenging. Difficulties include:

- business models in which various systems do not play well together and where users are confronted by many stand-alone search interfaces;
- systems that have privileged only some types, sources, formats and descriptions of information;
- relevant research spread across many languages;
- complexity derived from storing and describing geographically dispersed physical objects; and
- our hybrid world in which it is hard to mesh the properties of print and digital information for users.

The difficulty in just **finding** information has made reference work, library instruction, and consultations a vital part of liaison work. Shifting liaison work toward fixing the broken or inadequate parts of the system still puts liaisons at the center of helping users find and access relevant information. Through design and the affordances of technology, liaisons can help improve future discovery in powerful ways that reach well beyond some of the limits we currently face in making liaison expertise available.

Below are a few additional hypothetical examples about optimizing the use of information that begin to suggest how MIT liaisons' work will align with future library directions:

- Rather than searching for and reading single journal articles on a topic, many users want to engage with research materials computationally. If some of the discovery assistance that liaisons typically provide can be improved upon via technology, liaisons can shift some efforts towards assisting users with tools to manipulate and analyze information.
- As researchers rely ever more heavily on data or resources that are outside licensed or purchased library collections, liaisons are well positioned to develop systematic observations about what researchers use and how they use it. Liaisons will have a new role, yet to be fully defined, in helping the library incorporate these resources into a global, open-platform model, a model in which library collections are more porously understood as extending beyond what is purchased or licensed for local use.
- With a global, open-platform model, many customized interfaces can be layered on top of digital library collections. These interfaces, sometimes co-designed with users, can optimize access to specialized subsets of information or locally-produced descriptions of local information. Again, liaisons may be key intermediaries in understanding user perspectives and promoting more fair or technically improved discovery practices.
- Across all disciplines, researchers at MIT are engaged in making the world a better place by working with local communities to understand problems and find solutions. These researchers see themselves as co-designers with their global partners and therefore increasingly require that relevant information and data be accessible to their community partners. Meeting this challenge will require ongoing effort and advocacy from liaisons, as research moves from an exclusionary ecosystem to a more open one. Working with research teams, liaisons can help ensure that information is not just available to communities, but is usable by them, in ways that respect cultural norms, available technologies, local information practices, and other features that affect access.
- With researchers becoming increasingly vocal around

> information ecosystem issues such as privacy, social justice and big data, internet governance, and the like, library instruction may increasingly take shape as a program aimed at amplifying and extending the ability of community members to influence the way the information ecosystem works.

Liaisons and the Changing Paradigm for Collections—The Role of the Selector

Because selection of library materials has traditionally been a core responsibility of liaison work, it is perhaps the most high profile area in which liaison work will shift.

As described above, the context for the proposed changes in the selector/liaison role is nothing less than a technology-driven revolution in scholarly communication, comparable in significance and impact to that which occurred with the invention of the printing press in the 15th century. Greg Eow, associate director for collections in the MIT Libraries, reflected in May 2017 on the massive changes in scholarly communication that we are a part of, and how we will evolve to embrace these changes in service to our community—and the world:

> It's no secret that the world of scholarly communications is in tumult unseen in half a millennium. We often talk about how we will transform global scholarly communications toward more openness, and the way we will do it is this: rather than libraries being a constellation of organizations that purchase paywalled content for a community of local users (outside-in collections), libraries will instead become an interlinked network of organizations that capture the research output of their institutions and openly distribute this content to the global community (inside-out collections). That is how we flip scholarly communications.[3]

This call for the libraries' teaching and outreach staff to support our community in these expanded ways reflects trends that exist

> …the MIT Libraries should be a trusted vehicle for disseminating MIT research to the world.

well beyond MIT. Indeed, many voices echo Greg's, including those of Lorcan Dempsey, Susan Gibbons, and David Lewis. These experts and scholars have been articulating the challenges of the transformation of scholarly communications in the digital age for libraries, and have suggested that in this new context, universities should focus newly on making their own research and scholarship available.

Changes in the Role of the University Library and Selectors/Liaisons in the Digital Age

Lorcan Dempsey, in analyzing the impact of the digital environment on information access and the library role, has conceptualized the key shift: that university libraries need to move towards "inside-out" collections—collections of their own output and uniquely held materials.[4] Susan Gibbons has summarized this thinking:

> From the inside-out, who if not us will manage the research and other outputs of our universities? Is this not a reconceptualization of university archives? And if not us, do we just open the door for others, whether it's Elsevier or other vendors, to step into that place because we have failed to do so?[5]

Mirroring this call for universities to focus on their own outputs, the MIT Task Force on the Future of Libraries report calls upon the libraries to collect and share MIT's outputs: "In support of the MIT mission and values of openness and service, the MIT Libraries should be a trusted vehicle for disseminating MIT research to the world."[6]

The report acknowledges that the MIT Libraries have—and will continue to have—a role in purchasing and making available tools, services and products: "As an educational center, the MIT Libraries will collect and license the best tools and content, making them readily available and usable by the MIT community, and will offer training in their use to students, staff, and faculty."[7] But in the same context, the report clearly calls for the libraries to "serve as an open, authoritative, long-term repository for MIT-created content and its associated metadata."[8] To make room for this emphasis, our selection processes for commercial content will need to be more automated and streamlined and the focus of selectors needs to move towards selecting and acquiring MIT's own output.

To achieve these transformative aims, we envision a paradigm shift in the liaison/selector role—moving away from transactional and commercially focused work towards efforts focused on MIT's output and unique collections. This shift will take time—and we are just at the beginning of the journey.

Goals for Collections Work—Summary of Shifting Direction

Overall we expect a new focus of selection efforts on "inside-out" collections, with selectors engaged early in the research life cycle, and identifying which research outputs at MIT should be acquired, stored, described, and preserved.

The specifics of how this shift is carried out will vary by discipline, but overall and in general we anticipate:

New emphasis on:

- Discovering and helping to acquire inside-out collections
- Influencing collections processes that are more automated and centralized

Less emphasis on:

- Selecting commercially available materials title-by-title
- Working on the mechanics of transactionally based collections workflows

Overall the shift is:

- Moving away from widely distributed transactional approaches to more centralized and automated selection of commercial collections
- Reallocating selector time, which will allow us to grow into new and significant kinds of selection that are focused on more unique and MIT-produced materials, particularly in the growing digital scholarship and digital assets space
- Moving toward selection and outreach roles that will need to be even more collaborative and functionally team-based, working more deeply and routinely with colleagues in libraries units that focus on data, scholarly communications and collections, archives and special collections, and technology
- Leveraging synergies between the increased emphasis in the outreach role towards community engagement, including contributing to the vision of an open, global platform for sharing MIT's outputs, and participating in more information ecosystem programming and outreach—Examples of this kind of engagement could include raising awareness and catalyzing conversations with MIT students and researchers on topics such as intellectual property, data privacy, and open access, and what is at stake for members of our community as consumers, creators, and influencers in the digital information ecosphere.
- Continuing to leverage and value our strong skills in assessing and purchasing commercially available ("outside-in") materials for our collections, to meet our community's needs—And we will need to do this in a context of assertively and actively assessing the quality of these collections and how they meet users' needs:

balancing the aims of building and maintaining these outside-in collections with fostering access to MIT's unique collections and research outputs, and open access to science and scholarship, all in support of MIT's mission and MIT's current needs.

Success Scenarios, Uncertainties, and Road Maps for Instruction, Reference, and Outreach

In addition to selection work aligning with library priorities in new ways, there are some likely milestones on the road map shifting liaison work in the areas of instruction, reference, and outreach.

Instruction Changes

- A libraries-wide internal structure for this work—one that recognizes that staff across the libraries teach—and more libraries-wide focus on critical pedagogies, teaching in context, and instructional design
- A program that identifies outcomes and objectives around helping the MIT community to influence the information ecosystem, and that undertakes assessment to measure progress and impact
- A likely reframing of much of the instruction program around participation in campus learning communities, as opposed to experts offering a "service" of information skills instruction
- Actively developing a framework for balancing the range of teaching we do, including procedural (e.g., how to use a complex database), tactical (e.g., how to manage intellectual property), and ethical (e.g., how to engage in information ecosystem issues).

An example that speaks to the above points follows:

As on other campuses, researchers at MIT passionately engage in vital information-ecosystem issues, and one of the ways the instruction program at MIT will change is in joining with and amplifying these user-led efforts. A recent conference held at MIT—Data for Black Lives[9]—highlighted many ways in which big data can help or harm people of color. We are just beginning to understand these issues, and staff from very different parts of the library are joining existing groups and communities already conducting research in this field and sharing best practices. Our relationships and growing knowledge will serve to support and amplify this effort, perhaps through supporting future conferences and workshops led by others, joining research teams, changing the way data are represented or discovered in library systems, or other outputs. Efforts like this will be at the heart of the library's teaching and learning program.

Functioning effectively in a learning community requires a whole new skill set compared to the considerable skills liaisons have acquired for handling one-shot sessions and the many other kinds of teaching we are currently engaged in. As we are able to shift from helping users navigate an overly complicated and somewhat broken information ecosystem to helping users make informed decisions as creators, consumers, and influencers in the information ecosystem, we will be shifting much of our pedagogy from "sage on the stage" toward joining learning communities.

Reference Changes

- A staffing structure that recognizes the many types of expertise needed to effectively offer a service that ranges from interlibrary loan questions to requests to modify the institutional repository to advising on strategies for compiling complex data sets
- Technologies that transcend physical geography, and allow liaisons to interact with users seamlessly and effectively from any location—we have many channels for "remote" connection, and we are striving for processes and platforms that can make our virtual connections the equal of our face-to-face interactions.
- Computational means to help questioners find answers or locate experts—users express information needs in classrooms, in lab

groups, on email lists, and in many other venues. Gathering these expressions into the fold of reference help is part of the success scenario.

Liaisons have in-depth knowledge of how user communities work, share information, and support each other, and that knowledge is essential in designing systems that gather the kinds of questions and needs users have.

Clearly, the need for expertise and interpersonal skills involved in knowing how to answer questions and provide research assistance within disciplinary and interdisciplinary contexts will not diminish. The new skills needed from liaisons will be around working effectively in multiple virtual environments, and contributing systematic institutional knowledge toward service design for diverse user communities. To contribute toward service design, liaisons will need to better understand the business analysis work of the library. As the MIT Libraries systematizes the information we have about users from multiple sources, one of the challenges ahead is determining how best to feed liaison knowledge of user communities into the process.

Outreach Changes

- Defining outreach priorities—outreach can and does encompass everything from marketing library services to supporting faculty teaching and research to staffing shifts at orientation events. Given library-wide stakeholders for these activities carried out by liaisons, prioritization will necessitate library-wide conversations and decisions.
- A robust process for making decisions on library commitments to support the projects and community needs that continually surface as a result of outreach—while we pay homage to partnerships and collaborations, in reality, liaisons need much more robust tools to support anything other than fairly limited collaborative work. Most substantive partnerships require

cross-unit support from the library, and liaisons who are poised to engage this way will need an efficient and widely agreed on process to identify, vet, commit to, and support collaborations and partnerships.

- Tools to represent the variability among liaison constituencies and reveal the choices and impact of liaisons' outreach work—liaisons struggle with the question of how to balance demands on their time and focus. There's always more that could be done. Liaisons need tools that reveal their understanding of the complexity of their landscapes, the outreach choices they are making, and the areas where they hope to have the most impact. We have started to experiment with different kinds of landscape maps to visually represent these opportunities and choices.

We have traditionally relied on liaisons to use their judgment about outreach, based on the asymmetry of institutional knowledge—they know their user communities best. At the same time, we strive for ways to ensure that our allocation of effort is aligned with library priorities.

Moving from anecdotal observations and "I know my users" to more systematic ways of researching user needs has been a skills approach of the last decade. Increasingly, outreach work is moving away from the realm of "small business owner," in which each liaison either individually serves their constituencies or cobbles together temporary support from colleagues. More sustained and complex collaborations and partnerships require different skills in exploring, vetting, and shepherding project proposals toward library commitments.

Project management and portfolio management—not just within liaison programs, but library-wide—are also essential. Familiarity with complex processes like service design has become important. Not all liaisons will engage in service design, but all will need to understand and respect the complexity of committing the library to sustainable service models. And working on larger teams has brought forward the importance of developing functional expertise and working effectively with colleagues who have different roles and expertise—whether that is learning science, data management, intellectual property, licensing negotiations, coding, text and data mining, assessment, data visualization, or some other emerging form of functional expertise. Success will require highly cross-functional, team-based approaches and will need to draw upon experts in scholarly communications, digital preservation, archiving, and other areas in the libraries.

The Last Word: Change

Reframing the work of liaisons takes place within the larger changes happening across the MIT Libraries and globally in education, research, and scholarship.

Change won't happen overnight and some of it will be more gradual than abrupt. Still, we don't underplay the enormity of the changes we are facing. Seeing ourselves as part of global learning communities and committing ourselves to addressing the inequities of the information ecosystem have always been part of library values; foregrounding these concerns in a transformed landscape requires a paradigm shift in how we think broadly about the liaison and selector role.

As the research environment and the teaching and learning landscape shift, we know the means we use to accomplish our work must also change. Our ability to make effective use of new methods, new technologies, design skills, and team structures is essential to our success. We will advance our learning together, as an organization, and collaboratively with other organizations on the same path.

"We will advance our learning together, as an organization, and collaboratively with other organizations on the same path."

Moving along the path we describe here will require innovation, education, communication, and collaboration at bold new levels. We are ready, and we hope to learn from—and partner with—many others who are sharing this journey.

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The University of South Florida Libraries' Evolving Service Model: From ROLES to Research Platform Teams

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Responding to the profession-wide challenge to articulate the value and impact of academic library programs, the University of South Florida (USF) Libraries Academic Services department embarked on an ambitious exploration of the institution's need for and expectations of research and instruction services. Initiated in 2015, the study of USF's academic landscape concluded that it was time to substantively reconfigure the existing Liaison Program to meet requirements for the coming 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 to determine how the program could be re-imagined to more effectively support the research and teaching mission of the university.

In early March 2016, the assistant director for research services launched the project with a thorough exploration of the literature concerning liaison programs, and later developed a reading list of key sources to serve as a common foundation for all ROLES participants. The department's leadership team (director of academic services, the assistant director for research services, the assistant director for instructional services and the assistant director for digital learning initiatives) formulated the questions that would serve as the scaffolding for any liaison program emerging for the first time. From the initial exhaustive list, the group narrowed the questions to five 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 is the level of research in the current institutional curriculum?
5. What quantitative data is available and which data is useful for the project?

A project leader and a Steering Committee oversaw the initiative. The Steering Committee was comprised of the librarians leading each of five teams aligned with the areas of focus. These teams included:

- **Models:** Tasked with exploring the types of liaison programs currently in use at other universities and their histories, structures, strengths, challenges, and advice to others.
- **SWOT Analysis of Liaison Program:** Tasked with identifying the current liaison model's strengths, weaknesses, opportunities, and threats (SWOT).
- **Academic Needs:** Tasked with surveying the chairs and faculty in the academic departments to determine their needs from librarian liaisons with respect to research, collections, and instructional support.
- **Curriculum Team:** Tasked with examining the syllabi of academic programs to identify the level of research present in courses and assignments.
- **Data Gathering & Analysis:** Tasked with taking stock of the university to determine degree program information (program size, number of degrees awarded, trends, etc.) and faculty information (research areas, productivity, number of faculty per program, etc.)

Team members included librarians and other professionals from all departments within the library.

USF's Liaison Model: Past and Present

When the initiative began, the USF Libraries Liaison Program would best be described as traditional. This model had been adopted decades ago when there was a large Reference Services department with over 16 librarians and more than 15 graduate assistants from the School of Information. Assignments for "bibliographic instruction," as requested by department faculty, were blended with reference desk and collection development responsibilities. Librarians were individually assigned to academic departments based on one or more factors: librarian interests, academic background, or relationship to a faculty member in the department. In an environment with an essentially "flat" budget, declining personnel levels, and retirements over the last 11 years, this model proved unsustainable. Even as the USF Libraries' approach to reference and instruction services transformed into a more efficient program that applied library faculty where and when they were most needed and requested, it was clear that the traditional model had provided a beneficial and recognizable "face" or brand for thousands of faculty and students. Nonetheless, everyone understood that the Liaison Program needed to be reassessed. The goals of the new model were to preserve the "high-touch" benefit of a traditional model while exploring other models that more effectively allowed librarians to meet the changing instructional and research needs of faculty and students.

After much investigation into other models and their implementation at other academic libraries, and analysis of the strengths and weaknesses of our own program, the decision was made to combine the best aspects from each of the models studied.[1] The new model for the Liaison Program would employ the strengths of the three prevailing models described in the *ROLES Models Team Final Report*.[2] The comprehensive new model emphasized the liaison librarian as the USF Libraries' ambassador to the USF community, meeting university goals and departmental research needs through collaboration within and external to the USF Libraries. This new model, as described in the ROLES full final report,[3] would be structured to be adaptable for future needs and assessable in part or whole.

The Research Platform Team Initiative

In 2017, building on recommendations from the ROLES study and experiences from an earlier service model internally referred to as the Research Services & Collections unit, the dean of the USF Libraries launched a new service strategy that would take the bold recommendations articulated in the ROLES report to the next level. The Research Platform Team (RPT) model creates a series of librarian-led teams tasked with establishing deep relationships with faculty and graduate students in either an academic department or disciplinary cluster to provide targeted, focused, collaborative services that emphasize active participation (as opposed to support) in research, grants, teaching, and publication. Figure 1 provides a graphic overview of the concept. The RPTs will be complemented by an Academic Success Team of librarians with a primary focus on supporting the undergraduate student population.

Figure 1. Research Platform Team (RPT) concept

Each RPT employs the combined model approach to provide departments/disciplines with expertise in librarianship (for example, collection management, research support), functional expertise (for example, data management, publication support, GIS services, intellectual property), and subject expertise derived from education at or above the master's level of accomplishment. In forming the teams, the USF Libraries' leadership is committed to providing sufficient salary levels to recruit and hire librarians possessing a minimum of a master's degree in the target discipline. Additionally, each librarian leading an RPT will be complemented with one or more functional or subject experts to ensure that the level of support will meet faculty/graduate student expectations.

Each RPT will be able to draw upon a wealth of support across the organization, including seemingly disparate areas of activity as 3-D visualization services, digitization, fiscal support, intellectual property expertise, and more. The librarian lead for each RPT will also assume responsibility for collections (including the associated materials budget resources) that are unambiguously tied to the target discipline, while collections deemed general and multidisciplinary will continue to be acquired and managed by the Collections Department. The addition of responsibility for collections extends to the USF Libraries' Special Collections holdings based on the target discipline's needs. Finally, RPT members will be expected to teach credit-bearing courses within the department/disciplinary cluster, participate in grants, and engage actively in departmental research. In summary, they will be expected to become members of their departments even to the point of physically occupying space in that department or being jointly appointed.

In short, the RPT lead effectively becomes the director/head for liaison services, collections, special collections, digitization, GIS services, etc., based on the needs and expectations articulated by the faculty and graduate students in the target disciplines. Authority, budget, and accountability will all be decentralized as the RPT coverage extends across the institutional academic ecosystem. Department directors will exercise their leadership responsibilities through the articulation of broad goals/objectives for RPT leads and provide direct traditional oversight for the library's core functional areas (for example, cataloging, acquisitions) and shared services utilized by multiple RPTs (for example, GIS services, fiscal services, human resources). In this brave new world of decentralization, the USF Libraries leadership will focus on ensuring constant communication and careful coordination.

Conclusion

At the time of writing (May 2018), the first RPT has been launched. Led by a librarian with a graduate certificate in environmental studies and complemented by a newly hired ABD subject expert in geoscience education, that team is focused on the School of Geosciences (including the more traditional disciplines of geology, environmental studies, and geography). Three Research Platform Teams will be in place by fall 2018. They are the result of existing strong collaborative relationships with the departments and represent a translation of these relationships into a more formalized arrangement. The USF Libraries' five-year hiring plan includes 10 additional RPTs hired at a rate of two per year.

"The department chairs and departmental faculty (geosciences, English, and history) have expressed high levels of enthusiasm for working with the library to forge a new kind of partnership centered around increased support for faculty and graduate students."

The department chairs and departmental faculty (geosciences, English, and history) have expressed high levels of enthusiasm for working with the library to forge a new kind of partnership centered around increased support for faculty and graduate students. As the discussion progressed, the chairs from the departments circled areas of Figure 1 that were most interesting to them as an indicator of their interest in, and the importance of a service model "tailored" to specific disciplinary needs. There was no overlap in service interests. The challenge will lie in making good on each and every dimension of service we have proposed.

Acknowledgements

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Endnotes

1. After consulting with other institutions identified as USF peer and aspirant, three distinct models of liaison programs emerged: A traditional model, in which a librarian was assigned to liaison work for one or more academic departments; a functional model, in which librarians were assigned to specific library service categories but not to specific departments; and a subject team model, in which librarians assigned to specific departments were also organized by teams, usually based upon academic disciplines that were similar in their approach to research.
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Moving from Subject Specialists to a Functional Model

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Introduction

In summer of 2017 the University of California, Riverside (UCR) Library undertook a major structural reorganization of research, instructional, and collection development activities. Like many academic libraries at large research institutions, the library had been organized along a subject specialist model for decades. Each subject specialist held broad responsibilities for reference, instruction, and collection development for one or more academic departments. However, as a result of the implementation of the *UCR Library Strategic Plan*, the library made the decision to move from the subject specialist model to functional units for research services, teaching and learning, and collection strategies. In this case study we introduce the context and reasons for the reorganization, and describe the reorganization process in detail, including providing the timeline. We give an overview of the services, core competencies, staff roles, and training plans for each new department. Finally, we discuss future steps and lessons learned after eight months into the process.

> "...we would need to make some profound changes to the actual work we were currently doing...as well as in our organizational structure."

Background

Strategic Plan as Springboard

Following the appointment of a new university librarian (UL) in 2013, the UCR Library embarked on a strategic and holistic planning process to identify the needs of campus stakeholders, to develop vision and goals, and to create a road map to ensure that we continue to meet and anticipate the campus curricular and research needs. Working with an external consultant using the appreciative inquiry strengths-based approach over a seven-month period, the library facilitated meetings, workshops, focus groups, and other forums in order to surface and support insights and aspirations of the library and campus-wide stakeholders to inform the *UCR Library Strategic Plan*.

The vision and mission of the final *Strategic Plan*[2] were broad and focused on empowering positive change, accelerating academic achievement and the creation of knowledge, and energizing campus engagement in and transformation of local, national, and international arenas. This was heady stuff. It was clear to Library Administration that if we were to position ourselves to meet the lofty goals we were setting, we would need to make some profound changes to the actual work we were currently doing in research and instructional services, as well as in our organizational structure. Not surprisingly, the UCR Library had a very traditional setup of reference librarians who were also subject specialists. There were two parallel discipline-based departments in which librarians/subject specialists spent their days doing a mix of traditional reference, course-based library instruction, research-support workshops, and a smattering of collection development. Nothing significant had changed in responsibilities or structure for 10 to 15 years.

Developing Framing Questions

After the strategic planning process wrapped up in the summer of 2014, deputy university librarian Ann Frenkel initiated discussions with the reference librarians about how to meet the goals and objectives on research and teaching outlined in the *Strategic Plan*. The same external consultant from the planning process was engaged to help facilitate these meetings. Initially we held a working session where we posed the following questions to ourselves:

1. What structures and processes would enable the organization/group to get to the work that can't yet be done?
2. What is the best way to structure ourselves to best provide services and partner with faculty and students?

These discussions resulted in the identification of specific initiatives and expertise needed, including instructional design, learning assessments, a scalable instructional program, digital scholarship, geospatial information, data management, copyright consultations, and maker services.

> "...the functional structure would best address the need to focus on areas of new expertise and services in a reality of constrained staffing."

The librarians then discussed a variety of different structures and reviewed the pros and cons of the discipline-based model and the functional model, as well as a variety of hybrid and matrix structures. The librarians came to consensus around specific values within any structure that were important, including the ability to focus on user groups, to coordinate efforts, to set priorities, and to communicate value to external stakeholders.

Determining a Functional Structure

While the librarian discussions themselves did not result in consensus or a decision regarding an appropriate structural model, the content of the discussions (including the pros and the cons) were communicated to library leadership. Using the information uncovered by the librarian discussions, in early 2015 the university librarian and the associate university librarians made the decision to form a new functional structure consisting of a Teaching and Learning Department and a Research Services Department.

Library leadership believed that the functional structure would best address the need to focus on areas of new expertise and services in a reality of constrained staffing. The structure would eliminate unnecessary duplication of expertise and services between two departments that had been providing similar and parallel services. Certainly any structure requires coordination regarding disciplinary expertise, however, the specific focus on teaching and research goals in the *Strategic Plan* made the choice clear. Additionally, a functional model allows for more targeted skill development for librarians working in these units; historically, one challenge of subject specialist models has been divided attention between disparate responsibilities. The functional model would allow for focused expertise-building. Finally, subject specialist duties were not equally allocated throughout the discipline-based model; some reference librarians liaised to two departments with a handful of faculty, while others worked with multiple departments, containing hundreds of faculty. A functional model would allow for a redistribution of responsibilities, with a goal of more equal responsibilities.

Coincidentally, the UCR Library had two vacant department head positions, so after a delay (unrelated to the reorganization process itself), two job announcements were created for a director of Teaching and Learning and for a director of Research Services. Frenkel was clear that the actual forming and implementation of the model must be done collaboratively with the two positions hired and in place since the relationship between the two departments would require a certain amount of interdependence. Interestingly, the unanticipated length of time between the initial planning discussions in 2014 and the actual “boots on the ground” in May 2017 had the beneficial result of a fuller socialization within the staff of what felt to be a quite radical move away from the traditional subject specialist reference librarian model.

Reorganization Process

While the inspiration for this transition came as a result of the discussions and planning process described in the first part of this paper, the reorganization process began in earnest when the director of Teaching and Learning (T&L) and director of Research Services (RS) were hired in July 2016 and May 2017, respectively.

After completing an environmental scan of similar, large, academic libraries and current local practices, the directors of T&L and RS proposed the following major changes:

- Transition to a functional model, with teaching and instruction responsibilities handled by T&L, and research support (with the exception of course assignments) handled by RS.
- Agreement that support for undergraduate students would most often fall to T&L, while graduate and faculty level support would be most often provided by RS. We recognized that we would need to work closely together and remain flexible, as there is plenty of overlap and in some cases it is not obvious which department should take point.
- Removal of collection development responsibilities from T&L and RS librarian roles.
- Eventual transition from the librarian-staffed reference desk to a student-staffed information desk, which would be a shared service between T&L and RS.

We were cognizant that these proposed changes would impact departments across the library, particularly Collection Development Services. After discussing the changes and their implications, the associate UL (AUL) for collections and scholarly communication joined the reorganization. We began including librarians in the Collection

Development and Scholarly Communication division in subsequent meetings.

The changes proposed when the AUL for collections and scholarly communication joined included:

- Collection Development Services would be reimagined as Collection Strategies to focus specifically on proactive strategies for planning, building, and stewarding collections to support teaching and research.
- Bibliographers in Collection Development Services would become collection strategists and would place a new emphasis on data-driven decisions and assessment, and a focus on disciplines rather than departments.
- Responsibility for scholarly communication support would move from Collection Development to the Research Services department.

We had two primary mechanisms for gathering structured information to help inform our departmental visions. First, we created a service area template and asked librarians to describe the services they currently offered or worked with. Second, we created a survey that asked the librarians to describe their approach to outreach (anything that had not been covered by the service area documents or subsequent discussions). The outreach document was confidential and only shared between the directors, deputy UL, and the individual librarians. We also invited less structured feedback in other ways throughout the reorganization process, as referenced in the reorganization timeline below.

> “...the project team convened to place the librarians in positions aligned as closely as possible with their current skills, interests in professional growth, and their desired positions.”

Once the general structure and the specific positions were defined for the three departments, we initiated a reflective process where librarians were asked to complete statements in which they indicated their perceived strengths and preferred roles within the new organization structure (see Appendix). After the reflective statements were completed, the project team convened to place the librarians in positions aligned as closely as possible with their current skills, interests in professional growth, and their desired positions. All librarians were placed in one of their top three choices for positions.

We went into this process knowing that change can be extremely difficult to manage. Key aspects of our approach to the reorganization included:

- **Focus**: We felt that it was better for everyone involved if we communicated and kept to a timeline, rather than allowing the process to drag on without an end in sight. That said, we adjusted our schedule if necessary.
- **Transparency:** When we didn't know the answer to a question, or solution to an issue, we admitted it. We made clear when particular issues would require the departments to work together, rather than imposing a solution.
- **Iteration**: We sought feedback through a variety of channels—in-person and online, anonymous and not—and made adjustments to continuously improve our plan.

Reorganization Timeline

From start to finish, the active reorganization process took four months, from late May through late September 2017. We have included the timeline below.

The timeline does not include the weeks in which we did the initial information-gathering steps as described above, but we do allude to when we discussed them in group meetings.

Date	Activity Description	Details	Supplemental Information
Week 1	Meeting I: Deputy UL/ Directors only	In our first formal meeting, we drafted a project plan and transition timeline, which allowed us to map out meetings and deliverables, and consider what it would take to make the transition by the time the fall quarter began.	N/A
Week 2	Group Meeting I	In this meeting, led by the deputy UL and directors, we provided an overview of the reorganization process, reviewed the timeline, and introduced worksheets to gather information on services and liaison activities. Librarians were encouraged to ask questions and share feedback.	See Appendix for worksheet examples.
Week 3	Planning Retreat: Deputy UL/ Directors only	The directors presented initial visions for their departments to the deputy UL. Together, we discussed how the two proposed departmental structures would work together and planned activities for the first group retreat.	N/A

Date	Activity Description	Details	Supplemental Information
Week 3	Group Retreat I	This half-day retreat was focused on gathering librarian input on new directions for instruction- and research-related services. Activity 1—Where We've Been / Where We're Going Activity 2—Keep / Toss / Create Activity 3—Defining Our Values	See Appendix for descriptions of activities.
Week 5	Group Meeting II	This meeting allowed time for librarians to react to the retreat and to the exercise focused on gathering information on service areas. We reviewed next steps and introduced our plan for gathering information on how librarians approach outreach. Librarians were encouraged to ask questions and share feedback.	N/A

Date	Activity Description	Details	Supplemental Information
Week 7	Group Retreat II	The directors synthesized feedback and introduced departmental visions in 20–30 minute presentations, covering expertise needed and training programs that would be involved to get there. Librarians were encouraged to ask questions and share feedback.	N/A
Week 7	Directors present department visions to UL and AULs	At this time, the decision was made to include the Collection Development department in the reorganization process, in light of findings from the retreat, librarian feedback, and departmental visions.	N/A
Week 12	Group Retreat III	Final departmental vision and service plans were revealed. Most of the time was dedicated to dialogue between the directors and librarians. At this meeting, we asked librarians to complete a reflection statement (due at a later date) sharing their knowledge, skills, abilities, and interests and suggesting the areas/roles they were most interested in.	See Appendix for reflection questions.

Date	Activity Description	Details	Supplemental Information
Week 17*	Drafted SOPRs for the new librarian roles	The directors drafted statements of professional responsibility (SOPRs) for the librarians.	N/A
Week 18	Individual meetings: supervisor and librarian	The new roles were shared via email, followed by in-person meetings between the new supervisor and staff member to discuss the SOPR.	N/A
Week 20	Launch of new departments	By this date, the new departments were in place, and new SOPRs were finalized.	N/A

* **Note:** The gap between weeks 12 and 17 represented labor relations discussions related to the reorganization. These discussions were required as UC librarians are academic appointees who are represented by an exclusive bargaining unit. The reorganization process needed to pause until these discussions were completed.

For each new unit, the managers compiled information in four key areas: services, core competencies, roles, and training. We felt that these were some of the most important areas that librarians would want to understand and could provide feedback on. These are listed below, along with some additional context.

Teaching and Learning Department
Director: Dani Brecher Cook

Services

There are currently over 20,000 undergraduate students enrolled at the University of California, Riverside, so one major consideration for the new Teaching and Learning department had to be providing services strategically and at scale. For example, we provide instruction for the introductory writing sequence. Each section of the intermediate course is **required** to have a library session. In winter 2017, 100 sections of the course were offered, with 54 of them requesting (and receiving) library sessions. This is 54% coverage of a class where we have committed to being able to serve 100% of the courses. While we can project being able to provide in-person instruction for an additional 10%, we are limited by staff and classroom capacity, so a revised model is necessary for any growth.

With this in mind, we devised a service model focused on four key areas:

- **Undergraduate Education:** Focusing on scaffolding information literacy across the curriculum, including via course-integrated synchronous and asynchronous instruction. We are particularly interested in working with gateway courses, capstone research courses, and research-related co-curricular programs (such as prestigious undergraduate fellowships and community-engaged learning programs).
- **Graduate Education:** Preparing graduate students to both conduct their own research and teach as faculty, via partnerships with TA training, graduate success programs, and academic departments.
- **Faculty Support:** Providing consultations for instructors on syllabus and research assignment design, aid in adopting and developing open educational resources (OERs), and creating

reusable tools that can be adopted by instructors for use in courses without mediation.

- **Assessment:** Developing local metrics for information literacy competencies, creating tools for evaluation across disciplines, and participating in assessment efforts relating to Western Association of Schools and Colleges (WASC) accreditation.

These four focus areas holistically approach the student experience across the undergraduate and graduate career, and acknowledge the mixed methods required for providing meaningful learning experiences at scale.

Core Competencies

Teaching librarians can bring their unique expertise and experience to bear in the university ecosystem by focusing on their strengths in information organization, research pedagogy, and evidence-based practice. A shared, core understanding of learner-centered pedagogy, inclusive practices, and instructional design principles provides a baseline for both leading instruction and consulting with faculty on ways to incorporate information literacy into their courses. While the whole team will focus on developing and deepening expertise in these areas, individual librarians will also consider best practices and disciplinary needs among the specific user population that they serve (for example, data information literacy in the social sciences).

Roles

For the initial launch of the Teaching and Learning team, five teaching librarian positions and a staff coordinator role were proposed. Three librarian positions focus on disciplinary areas, with the intention that these roles will support courses within undergraduate majors, and would develop additional skills for supporting students and instructors working within a specific disciplinary context. One librarian position focuses on the “early experience,” working with learners who are new to the university in some way. While the user population does include traditional first-year students, this role is also tasked with supporting transfer students and graduate students in their first quarter at UCR. The final librarian position focuses on supporting co-curricular initiatives, including prestigious undergraduate fellowships, University Honors, and community-engaged learning. The six roles are:

- Arts & Humanities Teaching Librarian
- Social Sciences Teaching Librarian
- STEM Teaching Librarian
- Early Experience Teaching Librarian
- University Programs Teaching Librarian
- Teaching and Learning Services Coordinator

In addition, we proposed an instructional design–focused position for a future recruitment.

All teaching librarians will be expected to have a baseline understanding of library resources and searching, working knowledge of at least one citation management tool relevant to their user population, and more in-depth knowledge of disciplinary resources relevant to their user groups. Additionally, they are responsible for demonstrated growth in the core competency areas mentioned above.

Training

Because all of the librarians and the staff member in the Teaching and Learning department have extensive experience with “bibliographic instruction” (our still-in-use term prior to the reorganization), professional development for the first year was based around the idea of building a teaching community of practice, reflecting on previous and current teaching experiences, and approaching new skill acquisition through a lens of appreciative inquiry, building on already-held values and approaches.

To facilitate the development of a local community of practice, the team meets once per week for 30 minutes and completes a round-robin structured around two questions: What is one achievement that you would like to share from this week? What is one challenge that you faced? This provides a space for the team to continually learn from one another, with most of the discussions sparked by this round-robin related to teaching and reference interactions.

In fall 2017, the department met twice monthly for a more structured professional development series, focused around the question, "What is learning?" Methods of engagement included discussion of pre-assigned articles, reflective exercises, and seminar-style discussion. These sessions had two outcomes: (1) to develop a sense of what professional development opportunities would be most helpful over the course of the next year, and (2) to strongly develop teacher-librarian professional identities.

In winter 2018, we continued these sessions, and added two more formal and time-intensive opportunities: a two-hour discussion of best practices in teaching, facilitated by a curriculum coach, and a full-day workshop on instructional design basics. At the end of winter 2018, we met again as a team to determine appropriate next steps for development.

Research Services Department
Director: Brianna Marshall

Services

The Research Services (RS) department was designed to provide support across the research life cycle, advising on areas including:

- **Planning and conducting research projects**, including finding information, providing guidance on project planning, working with digital tools, and staying organized

- **Working with data**, including sharing best practices for finding, collecting, describing, and analyzing data
- **Publishing and sharing research**, including facilitating long-term and open access to research outputs
- **Measuring and analyzing impact**, including support for identity management and research metrics

We envisioned that RS librarians would primarily focus on supporting graduate student and faculty research needs given that Teaching and Learning librarians would be working with undergraduates in an instructional setting. However, UCR has a high number of undergraduate students who are involved in research projects that would also benefit from the type of expertise offered by RS librarians. Ultimately, it was decided that support for undergraduate research lies in a gray area and doesn't fit neatly into either department, so both directors plan to work closely together to determine how best to support these needs.

"A concerted effort was made to ensure that openness was highlighted as a departmental value. In practice, this means that RS librarians will prioritize facilitating open research..."

A concerted effort was made to ensure that openness was highlighted as a departmental value. In practice, this means that RS librarians will prioritize facilitating open research and, if possible, providing alternative solutions to closed platforms and processes. While it is not always possible (or desirable) for research outputs to be shared openly, the director felt this was an important value to have included from the earliest stage of development of the new department.

Core Competencies

We identified three areas where we felt it was critical for each librarian to have strong knowledge in order to respond to emerging research needs. There are undoubtedly concepts that overlap in each of the following areas (particularly in terms of tools and platforms) but nevertheless these seemed like useful lenses for considering the skills needed to navigate the quickly changing research landscape. Ideally, librarians will be able to layer deeper functional expertise related to their roles on a solid foundation of knowledge in the areas outlined below.

The expectation for RS librarians would not necessarily be to gain an unreasonably deep expertise in the following areas, but rather to gain enough fluency with the concepts to have conversations with researchers about their work, positioning them to be able to recognize the challenges they face and learn how the library can meet their needs.

- **Information:** Understanding how information is managed, including personal information management, data management and sharing, basic data science concepts, and relevant tools and platforms for managing information
- **Workflows:** Understanding researcher workflows, including the research life cycle, differences and similarities in researcher workflows across disciplines, researcher pressures and constraints, grants and funding, and relevant tools and platforms related to research workflows
- **Projects:** Understanding best practices for project management, including methods and approaches, applications for academic research, reproducible research, communication and collaboration, and tools and platforms related to projects

Roles

Originally, five librarian roles and one paraprofessional role were proposed as follows. In our model, each librarian acts as the point person for a particular area of expertise, serving as a functional specialist. However, these boundaries are flexible and fluid to allow for team-based consultations and open sharing of knowledge across the department.

The digital scholarship librarian takes the lead on digital project support, particularly for the digital humanities and social sciences. The open research librarian explores ways that the library can support open research and reproducibility, with an emphasis on supporting science, technology, engineering, and math disciplines. The data librarian provides expertise on research data management and data science, while the geospatial information librarian provides expertise on geospatial mapping tools and approaches. The maker services librarian acts as operations manager for the Creat'R Lab, a new makerspace in the UCR Library. Last, the Research Services assistant helps with general administrative and project support for the department.

This plan for librarian roles shifted slightly during the review process, when we opted to create a scholarly communication librarian position and proposed to hire the digital scholarship librarian at a later date. We felt that a scholarly communication librarian role focusing on support for scholarly publishing and impact would align more closely with librarians' existing skill sets and would allow us to recruit for the digital scholarship librarian, whose work would rely on an entirely new knowledge base.

Our final list of Research Services positions is as follows:

- Data Librarian
- Geospatial Information Librarian
- Open Research Librarian
- Maker Services Librarian
- Scholarly Communication Librarian
- Research Services Assistant

Given the small size of our team, RS librarians are expected to share responsibility for providing some services, including: general research skills (library databases and resources); information discovery services (finding publications, data sets, etc.); literature review support; project management support; and information management consultations and tools (for example, citation management, lab notebook organization, and collaboration platforms).

RS librarians are expected to take a proactive approach to creating opportunities to develop and share their area of functional expertise. When asked how RS librarians might measure their impact, we shared that initial broad indicators of impact could include how librarians have developed further expertise, how many consultations or projects a librarian worked on with individuals or groups, and how a librarian has engaged with the UCR community through events, workshops, or other means. Defining what success looks like for our work will undoubtedly be an ongoing conversation within the department.

Training

To support shared understanding of the core competencies, training has been planned for the 2018 academic year. The first training opportunity will be in-house training sessions led by the director of Research Services. Additionally, three librarians will join the 2018 DLF eResearch Network[3] in order to engage in the library research support community of practice.

Collection Strategies Department
AUL for Collections and Scholarly Communications Strategies: Tiffany Moxham

Services

The primary goal of the Collection Strategies department is to develop data-driven collection management strategies and communication methods that best support our teaching, learning, and research communities.

In order to achieve this goal the primary services needed are:

- **Collection Assessment**: development and maintenance of focused, data-driven print and e-resource license, acquisition, and organization
- **Access Services**: rapid response to resource access requests in support of teaching, learning, and research
- **Stakeholder Engagement in Collections Activities**: internally, predominantly through proactive communication with the Teaching and Learning and Research Departments; externally, predominantly through faculty and staff/student collaborations
- **Strategic Planning**: knowledge and proactive planning regarding developing and changing local needs and national/ international transformational collecting models

Core Competencies

- Expertise in best-practices around selection, acquisition, access, and discovery of resources
- Collection assessment skills
- Understanding of discipline area unique research, teaching, and format needs
- Proactive and reactive ability to adjust to initiatives, new pedagogies, and collecting models
- Communication skills; proactive communication skills with all stakeholders
- Building effective vendor relations
- Ability to navigate electronic resources troubleshooting
- Ability to effectively work with technologies such as integrated library management systems and platforms and statistics aggregators
- In addition, all collection strategists have at least one non-disciplinary related area of expertise around which they are expected to develop competencies.

Roles

Creating roles based around disciplinary areas assists with external communications, particularly with faculty. However, it was clear very quickly after the reorganization that it was necessary to codify certain duties as specific assignments to individuals not based around disciplinary areas. The sub-areas were added four months after the reorganization.

As part of the reorganization, Collection Strategies lost their paraprofessional and student support, requiring the need for librarians to take on additional roles. Additionally, while the previous subject-based collecting areas were reassigned under three disciplinary areas, overarching areas such as e-book maintenance and e-resource management areas were not initially re-assigned. Some of these needed areas are still under review.

As such, there is a short-term need for at least one additional team member to ensure both the ability to maintain core collection duties and in order to provide an increased level of assessment and the data-driven focus desired. This additional member would be required to focus a large amount of their time on developing visualization and assessment tools that could be utilized across disciplines and collections.

Our current list of roles (with sub-areas in parenthesis) is:

- Collection Strategist for STEM (E-resources lead)
- Collection Strategist for Social Sciences and Area Studies (Coordination of storage facilities and external shared print projects)
- Collections Strategist for Arts and Humanities (Transformational models lead)

Training

Immediately following the reorganization the Collection Strategies department went through a leadership transition, and therefore training was delayed until the spring quarter.

The initial round of training has focused on developing the e-resources and informational technology systems use by strategists who were not previously regularly and actively engaged in this area. The sessions are being led by the new STEM collection strategist, who was the previous electronic resources librarian, and are conducted in-house. The training sessions are broken down into one-hour sessions around various systems, technologies, or activity areas. The sessions are then followed up with active use of the system(s) and team collaborations to aid with learning the technologies.

The next team sessions will be based around reflective exercises and discussions of pre-assigned chapter, papers, and/or articles around the area of electronic resource management. Starting in fall, the aim is to begin more personalized training activities based on individual professional development areas. The intention is for these personalized training areas to incorporate outside engagement and collaborative activities.

Communication and Outreach

Our primary method of sharing out our internal organizational changes to the campus was via email to academic department chairs and faculty who are formal liaisons to the library. The text of the email is included in the Appendix. To our surprise, we received very little feedback from faculty (with the exception of a few departments with collections concerns). We also made significant updates to the UCR Library website to reflect the new structure. However, we anticipate that the majority of our departmental outreach will occur in fall 2018 (see the “Future Steps” section below).

Future Steps

- **Assessment**: In fall 2017, each department developed goals and strategic directions. In summer 2018, we will begin to evaluate the effectiveness of the new model, including surveying librarians in new roles, mapping accomplishments to goals, and developing baseline metrics for future assessment.
- **Departmental Outreach**: The first year of the new model has been focused on developing strategic goals for each unit and skill-building. Beginning in fall 2018, we will turn our attention increasingly outward, visiting individual academic departments and discussing new service models. We envision each visit will involve a cross-functional team, with representation from Teaching and Learning, Research Services, and Collection Strategies.
- **Reference Service Revision**: Following on the premise of the functional model that targeted services require targeted time and attention, we are currently working on a proposal to revamp our reference desk service into a student-staffed information desk model. Over 80% of the questions answered at our service points have been identified as directional, simple reference, or technology-related (for example, printer problems), and we believe a triage-style model, with well-trained students as the first point-of-contact for library users, will both free up staff time and provide a valuable learning experience for student workers.

Lessons Learned

We have several suggestions for institutions looking to undertake a similar process.

- **Develop a timeline.** We created a timeline early on, and shared the timeline with librarians in the affected departments for full transparency. We attribute much of the success we had in staying on track to this initial timeline document. Although we made several adjustments in exact dates due to foreseen and unforeseen circumstances, we were able to successfully make the transition over a four-month period. Additionally, we initiated the reorganization over the summer, which benefited us given that we weren't vying for everyone's attention during the academic year.

- **Recognize that change is difficult and that people will react in different ways.** We experienced a variety of reactions from librarians affected by the reorganization, ranging from disappointment to excitement. Regardless of their overall attitude toward the new change, we anticipated that they might still feel anxious at one point or another. We did our best to be supportive and empathetic throughout the process.
- **Be collaborative and flexible.** If we hadn't been willing to adapt our initial approach to this process, we would have missed out on the opportunity to involve the Collections unit in the reorganization.
- **Provide something for affected librarians or other library colleagues to react to.** We found it difficult to prompt useful discussion without providing documentation or a written outline of ideas so we aimed to do so when possible, even when materials were still in draft form. This is beneficial in a few ways. It help minimize uncertainty about what leadership has in mind. It can also serve as an important catalyst for discussion and feedback.
- **Work proactively with Human Resources (HR) and/or Labor Relations.** Depending on the organizational environment and HR policies and procedures, it is important to have early conversations with HR staff and labor relations (as appropriate). UCR has both librarians and staff in bargaining units, so there were specific protocols we needed to follow to revise job descriptions. In fact, we added some padding to the implementation timeline to accommodate the necessary discussions.

Conclusion

After only eight months post-implementation, and without a comprehensive or formal assessment, it is difficult to present a firm conclusion. However, at this early juncture we are overwhelmingly pleased with the effects of the reorganization on public services at UCR Library. Focused attention to specific areas of teaching and research services has produced measurable and impactful changes in current services, such as the revision of first-year instructional programs, and a robust maker services program. As the new departments continue to work and learn together, we anticipate being able to further deepen the library's impact on the campus community.

"...at this early juncture we are overwhelmingly pleased with the effects of the reorganization on public services at UCR Library."

Appendix

Information Gathering: Outreach
Information Gathering: Services
Joint Department Retreat
Reflective Statement Questions
Outreach Email to Faculty

Information Gathering: Outreach

Format: This private survey allowed librarians to provide information about the outreach methods they employed in working with different departments. Survey questions are included below for your reference.

> Librarian name
> Enter the name of one department that you are the subject specialist for.
> How would you describe your relationship with this department?

Close, distant, somewhere in between?
Please pick the response that best represents your experience.
- I attend department meetings regularly
- I attend department meetings once a year
- I attend department meetings every few years
- I’ve never attended a department meeting

Please pick the response that best represents your experience.
- I participate in departmental projects regularly
- I participate in departmental projects once a year
- I participate in departmental projects every few years
- I have never participated in a departmental project

Please describe a few of the projects that you have participated in.
Are there specific faculty, graduate students, or program groups that you work with more closely?
How often do you receive requests related to collections from this department?
Have you participated in grant applications with this department?
What grants have you participated in?
How do you work with new faculty in this department?
How do you work with new courses in this department?
What is your favorite outreach activity that you participate in with this department?
Are there requests from faculty or students in this department (or ideas that you have for outreach) that you don’t have time or resources for currently?
What are some unique ways that you support this department?
What else would you like to tell us about your outreach work with this department?
Are you the subject specialist for any other departments?

If answer is yes, survey questions are repeated for new department.

Information Gathering: Services

Format: A master document was shared on Google Drive and open to both departments. Librarians signed up to fill in information for 2-3 service areas. After their first pass, all librarians were invited to fill in any additional information they might know about the services. Introductory text and questions are included below for your reference.

> Answer the following questions as completely and accurately as possible for each service area, including any statistics that exist. You may need to consult with other librarians to get a complete picture of the service. If the service is not currently offered, write N/A.
>
> To get started, simply click on the link to the service you've been asked to work on.
>
> **Research Services**
> Research Consultations by Appointment
> Point of Need Reference and Research Assistance—Desk, Email, Chat, Text (Orbach Library)
> Point of Need Reference and Research Assistance—Desk, Email, Chat, Text (Rivera Library)
> Programming and Annual Events
> Workshops
> Collection Development
> Creat'R Lab and Maker Boxes
> Support for Patent Searching and Trademark Searching (USPTO)
> Support for Geospatial Resources and Tools
> Support for Grants / Research Funding Opportunities
> Support for Author Publishing and Publishing Metrics
> Support for Using Copyrighted or Licensed Materials
> Support for Research Data Management and Visualization
> Support for UC Curation Center (UC3) Tools (eScholarship, DASH, etc.)
> Support for Digital Scholarship Projects (including Digital Humanities)
> Support for Public Access Compliance (Federal Grants)
> Support for Open Access Mandate Compliance (UC System)

Teaching and Learning Services
ENGL 1A-B-C
CHEM 1LA
BIO 5LA
Discipline-specific course-related instruction
Undergraduate grant program support instruction (MMUF, MSRIP)
Affordable Course Materials Initiative support
Tours
Education Services teaching and programming
Orientations
Grad student coffees
International student events
Course and research guides
Online learning objects
Learning Resources Display Center
Citation management
Support for campus programs (e.g., Honors)

Questions
What is the current service?
Is there documentation or a web presence for this service? Please list any relevant links.
Who are the target users?
What do we know about our current model (data, feedback, standing with national trends, etc.)?
What is the impact?
How do users interact with the service?
What do we know about users' assessment of these interactions and their experiences?
Where is the service delivered (include physical, virtual, geographical)?
What marketing and outreach is done to advertise the service?
How is the service staffed?
What are the access requirements for using the service (e.g., technology)?

What challenges do users have with the service (gap analysis)?
What are the complementary services, co-dependencies, and/or partnerships (internal and external)?
How is the service assessed/evaluated?
Who is responsible for the assessment?
*** How can this service be improved?
*** Is there anything else you'd like to share about this service?

Joint Departmental Retreat

Format: Early in our change process, we held a joint departmental retreat scheduled outside of the library building. Our goal was to learn more about the ideas librarians had for how the new departments could best meet user needs. The schedule that we followed is included below.

1-1:15: Overview of Retreat

1:15-2:15: Activity 1: Processing Exercise (Dani)

2:15-2:30: Break

2:30-3:30: Activity 2: Keep / Toss / Create (Brianna)
- Overview and count off in groups of 4
- First groupings: 15 minutes
- Second groupings: 15 minutes
- Report back and discussion: 30 minutes

Categories
- Keep—What should we keep doing since it works really well and serves a user need?
- Toss / Change—What should we toss or significantly change? What doesn't work well or no longer has impact?
- Create / Adapt—What do we need to create to meet the needs of

today and have greater impact on our users?

3:30-3:45: Break

3:45-4:30: Activity 3: Departmental Values (Dani/Brianna)
- Individual reflection: No more than 10 minutes
- Group discussion

Reflective Statement Questions

Format: This survey invited librarians to give information about their strengths, interests, and preferences. Survey text and questions are included below for your reference.

This survey will allow you to give information about your strengths, interests, and preferences.

The deadline for filling out the survey is **August 11, 2017** at noon. Please make sure you submit your survey by that date and time.

The survey will automatically save your responses which allows you to work on this over time-- as long as you have not clicked the submit button. To revise or add text, just return to the link you were sent in email. Click submit when you have finalized your responses.

Your responses will not be shared with departmental colleagues.

Q1. Your name:

Q2. Please describe the strengths, skills, abilities and expertise you have as a librarian or library staff member.

Q3. As a librarian or library staff member, are there areas of responsibility you are interested in growing into, or increasing your expertise in? Please describe.

Q4. Please indicate the roles or positions in which you have strong interest (you may indicate more than one).

Template Outreach Email to Faculty

Format: The following email was sent to faculty library liaisons to communicate our new structure.

Dear Professor <name>,

Over the last several months, the library has been engaged in a process to identify ways to most effectively meet the goals and objectives in the UCR Library Strategic plan to better provide teaching and research support, through our services and collections.

We are contacting department chairs and faculty who have been liaisons from departments to the library. Please pass this information on to your departmental colleagues.

The library is implementing a new organizational structure designed to provide more focus and in-depth support for all disciplines, for teaching and learning, for research, and for improving the library's collections. Librarians will work in three new units, and in new roles reflecting the new structure. Services to faculty and students provided by these units will include:

Teaching & Learning (led by Dani Brecher Cook, Director of Teaching and Learning)
- Facilitating course-related library instruction sessions
- Developing tools for teaching information literacy skills
- Providing consultations and support for research assignment design

Research Services (led by Brianna Marshall, Director of Research Services)

- Offering research and reference consultations
- Providing in-depth research support, including on data management, open access publication and copyright, and geospatial resources
- Managing and supporting programming for the Creat'R Lab makerspace in Orbach Library

Collection Strategies (led by Ann Frenkel, Deputy University Librarian)
- Enhancing the library's circulating collections in the arts and humanities, social sciences and area studies, and STEM disciplines
- Building research collections supporting UCR's distinctive contributions to research

Your primary contact for instructional sessions and services will be:
<insert librarian name, title, and contact information>

Your primary contact for library collections will be:
<insert librarian name, title, and contact information>

For research services, you may contact any of the librarians in the department.

If you are not sure where your question belongs, no matter who you contact, we will get your question to the most appropriate librarian to help you.

This is an ongoing process. We know that there will be adjustments and further refinements, and we look forward to constructive conversations regarding your experience with this new model of service and support over the coming months.

Warm regards,
Ann Frenkel, Deputy University Librarian

Endnotes

1. In late September 2017, former associate university librarian for collections and scholarly communication Alison Scott left UCR for UCLA, although she stayed through the first weeks of implementation. Assistant university librarian Tiffany Moxham started as of January 1, 2018. The project team consists of the authors of this case study and Alison Scott.

2. UCR Library, *UCR Library Strategic Plan*, developed academic year 2014–2015, revised for 2016–2017, accessed June 7, 2018, https://library.ucr.edu/sites/default/files/UCR%20Library%20Strategic%20Plan%202015-04-21.pdf.

3. Digital Library Federation, "DLF eResearch Network," accessed June 7, 2018, https://www.diglib.org/opportunities/e-research-network/.

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Iterative Evolution of the Liaison Librarian Role: A Brief Case Study

Jenifer Flaxbart, Assistant Director of Research Support and Digital Initiatives, The University of Texas Libraries at the University of Texas at Austin

Recognizing a need to evolve subject liaison responsibilities and related skill sets with an emphasis on digital research and pedagogy, The University of Texas Libraries (UTL) at the University of Texas at Austin has reorganized its Academic Engagement division and related approach to liaison work twice in the past two years.

The first iteration (in August 2016) established a large Research department comprised of four subject-specific liaison teams, still reflected in the four core collections foci of arts and humanities; global studies; science, technology, engineering, and mathematics (STEM); and social sciences. These four teams were led by staff who were also liaisons themselves. The Research department also included Collections and associated staff managing print and electronic monograph, journal, and database subscriptions at the UT Austin and UT System levels. The Teaching and Learning Services department added service-point coordination and related staff to its team of instruction-focused functional experts. A newly created Digital Scholarship Team, comprised of functional experts aligned with the research life cycle, rounded out the Academic Engagement division. While aspects of this arrangement worked well, the Research department was too large and there was limited cross-collaboration between and communication among liaisons on the four subject-specific teams.

As of fall semester 2017, UTL created multidisciplinary "Engagement Teams" comprised of liaisons with individual subject-based portfolios working together with a particular focus. This transition aligned liaisons with similar strengths and interests, including teaching, data and digital approaches to research, and collection management, while commingling disciplinary portfolios to reflect the interdisciplinary nature of modern research. Teaching and Learning Services took on an Engagement Team, a new department called Research Support and Digital Initiatives was created and took on two Engagement Teams in addition to the Digital Scholarship Team, and a new Scholarly Resources department was created for oversight of core, distinctive, and UT System-level collections workflows.

There are three Engagement Teams, each reporting to a team lead who is also a subject liaison:

- **Arts, Humanities, and Global Studies Engagement Team**, within the Research Support and Digital Initiatives department—eight liaisons focused on Digital Humanities/Digital Scholarship (DH/DS), working with collections as data, digital projects and exhibitions of born-digital/digitized collections content
- **STEM and Social Sciences Engagement Team**, within the Research Support and Digital Initiatives department—seven liaisons focused on digital methodologies, working with data, digital projects
- **Teaching and Learning Engagement Team**, within the Teaching and Learning Services department—six liaisons focused on pedagogy, information literacy, digital fluency

Additionally, four subject liaisons with particularly strong collection stewardship skills were placed within the Scholarly Resources department, and each is charged respectively with core collections coordination for:

- Arts and humanities
- Global studies
- STEM
- Social sciences

The three departments mentioned—Teaching and Learning Services, Research Support and Digital Initiatives, and Scholarly Resources—are led by assistant directors, and these departments comprise the Academic Engagement division, led by the director of Academic Engagement.

Each of the three departments, while hosting an Engagement Team of liaison librarians or individual liaisons who work collaboratively, as in Scholarly Resources, also include other groups of staff who are not liaisons but rather are assigned to specific initiatives. Teaching and Learning Services has a team of five focused on Information Literacy, First-Year Programs, and Learning and Assessment. In Research Support and Digital Initiatives, the five functional experts on the Digital Scholarship Team support aspects of the research life cycle, specifically scholarly communication, research data management, GIS and DH/DS project work. (See pages 4–15 pertaining to Academic Engagement in the UT Libraries organizational chart, accessed May 23, 2018, at https://legacy.lib.utexas.edu/d7/sites/default/files/ut-libraries-org-structure.pdf.)

“...the Engagement Teams approach serves to align areas of affinity and encourage interdisciplinary collaboration.”

As mentioned, the Engagement Teams approach serves to align areas of affinity and encourage interdisciplinary collaboration. And it allows subject liaisons to focus on projects suited to their interests and strengths (digital learning object creation, text mining or digital exhibitions, or print and electronic collections work) while working with others across Engagement Teams to develop alliances for load-balancing by sharing teaching, digital-focused projects, and collection development responsibilities.

This iterative evolution of roles and organizational relationships requires ongoing discussion, assessment, and adjustment. In the midst of these changes, we are also monitoring our budget and needs for expertise and capacity that we lack, all of which factor into decisions we make to support both our faculty and students as well as our staff.

Questions about this model are welcomed by the author at jflaxbart@austin.utexas.edu.

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