

Reconceptualizing Liaisons: A Model for Assessing and Developing Liaison Competencies to Guide Professional Development

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Abstract

In an effort to reconceptualize its liaison program, the FSU Libraries initiated a three-phase, grassroots effort to develop a set of core values and competencies, conduct a self-assessment based upon those competencies, and create a strategic training program based upon the results. It was determined that defining liaison values guides practice, particularly with a hybrid model of liaisons collaborating with functional experts to engage users. The results of the self-assessment indicated that liaisons felt competent in teaching and research services, but less confident engaging faculty members in areas related to scholarly communication and digital tools. Our core competencies and best practices provide benchmarks for superior service and structure for an intentional training program.

Introduction

As in many academic libraries, Florida State University (FSU) Libraries' liaison program was conceived as one of outreach from the Libraries to the academic departments. Initially, expectations for liaisons focused on communication, collection development, research assistance, and instruction. Additional expectations for new areas of involvement, such as scholarly communication, were added along the way, but as new services emerged, technology changed, and teaching and learning in higher education evolved, those expectations needed a substantial revision. Over the past two years, FSU Libraries have engaged in an effort to reconceptualize its program for liaisons, to establish a set of core values and competencies and to design a training program to better equip librarians to carry out their roles in engaging with faculty and students.

The FSU Libraries liaison program began in 2002 when librarians were first assigned to serve as liaisons to academic departments. As the program developed, there was an effort to assign librarians based on academic degrees or subject knowledge, though in some cases librarians were assigned to an academic department different from their own subject background. To clarify the role of library liaisons for academic departments, they are marketed to the campus as *subject librarians*. The two terms - liaisons and subject librarians - will be used interchangeably throughout this article.

While there is a coordinator for the subject librarian program, the program is decentralized. Subject librarians come from a broad range of departments and report to the heads of those units and not to the program coordinator. Each librarian has a percentage of their job responsibilities devoted to liaison work, but there is no formal assessment of this work.

A document outlining expectations for library liaisons is used as part of the orientation for new liaisons. All librarians in the program are expected to attend monthly meetings, which have traditionally been opportunities for training, internal announcements, and idea sharing. Programs for the monthly meetings have been based on perceived needs, current issues and trends, but not on data.

Even without data, it was evident that there were uneven skill sets among liaisons. In part this was due to different levels of experience, subject expertise, technology skills, and opportunities. For a number of librarians, liaison responsibilities were not the primary focus of their job, and the time they had to devote to learning about new issues, products or skills, creating materials, and developing relationships within their assigned departments was limited.

At the same time that there was consideration of ways to address these uneven skill sets, the Association of Research Libraries (ARL) published *New Roles for New Times: Transforming Liaison Roles in Research Libraries*, a report on the changing roles of liaisons.¹ This seemed like an optimal time to reevaluate the expectations for library liaisons and to chart a new course for the coming years in a way that can be a model for other libraries undergoing a similar transformation.

Literature Review

In the past five to six years, a significant amount of library literature has been focused on the changing role of the liaison librarian. Professional organizations have conducted research on liaison trends and university libraries have restructured liaison programs with newly required competencies and skills. The idea of competencies is not new, however. In the 1990's, the business world wrote extensively on the subject of competencies. Prahalad and Hamel defined "core competencies" as those broad bundles of practices that are the hallmark of the organization - skill sets that make an organization unique and competitive.² Consistently, the business literature characterized values and competencies by an interdependent relationship. Collins and Porras defined core values as "the organization's essential and enduring tenets".³ According to these authors, values are the principles that guide practice. Cheetham & Chivers assert that values ought to have an explicit place within an organization's competencies because values clearly influence practice and practice is the application of those values.⁴

In order to improve upon the competencies of the liaison librarian, the Association of Southeastern Research Libraries (ASERL) proposed the creation of a professional development program for liaisons in 2009.⁵ Unfortunately, the program never gained support; however, the intent of the program was significant: transitioning from the collections-focused role to an engagement and

collaborative model with a professional development focus on digital libraries, institutional repositories, scholarly communication, data services, e-science, and interdisciplinary research partnerships.

In 2012, ARL produced a scenarios report in which the authors describe the future librarian as a “broker of deep collaboration with others”.⁶ In addition to subject and IT expertise, the report suggests that librarians develop competencies in collaboration, entrepreneurialism, project management, and leadership. It was followed a year later by the *New Roles for New Times* report.⁷ The authors describe the shift from the original bibliographer and liaison models to the engaged model in which the liaison plays both advocate and consultant, participating “in the entire lifecycle of the research, teaching, and learning process”.⁸ Jaguszewski and Williams argue that the ability to collaborate within and across institutions, to make connections and referrals, and to build teams of functional experts is fundamental to the new liaison role.

That same year, in her closing keynote address at the ASERL Summertime Summit, Lorraine Haricombe encouraged liaisons to actively insert themselves into the “researcher’s space”.⁹ This active approach to engagement is also discussed by John Bales, who calls for liaisons “to do more than ‘liaison’ with faculty”.¹⁰ Bales uses a methodology called “Moves Management” to strategically develop and document “new forms of relationship building” with faculty members.¹¹

The 2015 ARL *SPEC Kit 349: Evolution of Library Liaisons* documented the evolutionary changes of the liaison role from collection-centered to engagement-centered.¹² Miller and Pressley report that 90% of the 72 survey respondents indicated departmental outreach, reference, collections development, instruction, and scholarly communication education as part of their core liaison duties. However, more than half stated that additional services such as assistance with scholarly impact, promotion of institutional repository, open access consultations, data management support, and new literacies education have now become part of their responsibilities.

Several university libraries recently documented their processes for restructuring their liaison programs.¹³ Duke University, Ohio State, UC Berkeley, University of Minnesota, and the University of Washington libraries all adopted new core competencies to support an engagement-centered model with an emphasis on collaborating with functional specialists in copyright, digital initiatives, scholarly communication, and data services. Ohio State defined *engagement* as a “deepened involvement with the academic community,” as well as “positioning subject librarian expertise within the workflows of users”.¹⁴ Similarly, Duke University defined the role of the liaison as “an essential partner in research, teaching and scholarly communication”.¹⁵ The University of Minnesota now requires “baseline expertise” in scholarly communication for all liaison librarians.¹⁶

Building on many of these university initiatives, Columbia University, Cornell University, the University of Toronto, and ARL hosted a library liaison institute in 2015.¹⁷ Discussions focused on the transition from the traditional liaison work of instruction, reference and collection development to a greater focus on training, collaboration, and partnering with library users in their research. The institute encouraged liaisons to shift their mindset from thinking about what they do to the impact they make on the research and learning process.

Library literature has recently identified the values of engagement and collaboration as the foundation of liaison practice.¹⁸ However, Kenney states that most liaison programs “are informal, fluid, with no dedicated funding, no formal training, no assessment tools, and no measures of performance”.¹⁹ Kenney makes a case for training to build competencies across a broad range of scholarly issues.²⁰ Therefore, there is a need for assessment tools and measures of performance to be developed and tested so they can be shared among academic libraries to evaluate new liaison competencies and roles. Self-assessment tools, in particular, can help liaisons become aware of their growth areas and inform training and professional development activities.

Background

Florida State University (FSU) is a Carnegie RU/HV (Research I) institution with a total of 41,773 students enrolled in Fall 2014. In Fall 2014, there were 2,408 full and part-time faculty members.²¹ Most of the FSU campus is served by FSU Libraries, which consists of the Robert M. Strozier Library, Paul Dirac Science Library, and the FAMU-FSU College of Engineering Library. In addition, there are campus libraries serving the Colleges of Medicine, Law, Music, and Communication and Information. Of the 41 librarians in FSU Libraries, 20 have responsibilities as subject librarians.

Development Of The Core Competencies

Developing a set of core competencies for the FSU subject librarians would provide strategic direction for training, professional development, assessment, and hiring. It was anticipated that clearly articulated competencies would better align the library with the university’s mission and performance funding initiatives.²²

In the fall of 2013, several librarians initiated a three-phase project to (1) develop a set of values and core competencies for the subject librarians, (2) conduct a self-assessment based upon those competencies, and (3) create a strategic training program based upon the self-assessment results. Approved by library administration, the project was introduced to the subject librarian program and a call was made for volunteers to join a working group.

Throughout the spring 2014 semester, a group of nine librarians reviewed literature on the changing roles of liaison librarians, discussed the concept of *core competencies*, and drafted a competencies document.²³ The working group identified three central values of the liaison program, and flowing out from those values, five core competencies. The group recognized that its organizational values helped to define a common identity and culture, as well as form the guiding principles for professional practice. While not everyone is expected to be an expert in all of the competencies, the values—engagement, advocacy, and collaboration—are expected to be a priority of all liaisons. It is noteworthy that the three defining values emerged from more of a grassroots *necessity* than from predefined organizational values. For example, collaboration and engagement have become

increasingly critical as digital scholarship has evolved, and although advocacy has been a traditional librarian value since the profession's inception, the current practice of advocacy at FSU is a response to the need to speak for student and faculty resources, open access opportunities, and author rights.



Figure 1: Liaison Values are at the center of the figure influencing each of the five competency areas.²⁴

The core competencies—research services, scholarly communication, use of digital tools, teaching, and collection development and access—are the practical benchmarks for superior practice and service. They are the skill sets that make liaisons distinctively unique on campus. Again, it is not expected that every liaison be an expert in every area; however, values encourage liaisons to partner with other areas of expertise to meet the research and teaching needs on campus. Similar to what is stated in *New Roles for New Times*, FSU Libraries employs a hybrid model where subject liaisons collaborate with functional specialists who are experts in areas such as digital scholarship, data, assessment, and scholarly communication to engage with faculty and students.²⁵ These experts do not necessarily have subject assignments or library degrees. While all liaisons are expected to have a baseline level of competency in all areas, the competencies and their accompanying best practices are something for each liaison to work towards; they provide the liaison program with a structure for goal setting, assessment, services, hiring, and training.²⁶

The three overarching values are:

Engagement: Liaisons are active partners in the academic community, take initiative to develop relationships with faculty, and are deeply involved in the entire lifecycle of research, teaching, and learning.

Advocacy: Liaisons intelligently and persuasively advocate for important issues within the research community.

Collaboration: Liaisons embrace the diverse skillsets of others, and are committed to networking with other professionals to build effective research and learning teams.

The five core competencies are defined as:

Research Services: Liaisons actively participate in the research of their assigned departments. They engage faculty and students throughout the entire research lifecycle. Liaisons know what constitutes successful research and they develop a strong understanding of the research development processes and output in assigned disciplines.

Scholarly Communication: Liaisons function as both advocates and consultants for changes in academic publishing, including shifts toward open access, expanded understanding of author rights, and the practical implications of research compliance related to dissemination of research.

Use of Digital Tools: The liaison promotes the use of subject-specific information resources and services to meet user needs and expectations, utilizing current technologies and digital information tools.

Teaching: The liaison collaborates with colleagues within and beyond the libraries to implement strategic information literacy instruction that supports university curriculum and student research.

Collection Development and Access: The liaison develops and manages collections and works to provide on-demand access to content to support research and teaching in assigned subject areas.

The core competencies document was presented to the subject librarian group for discussion, feedback and editing before it was finally adopted. Upon acceptance of the document, an additional call was made to assist with the second phase of the project: developing a self-assessment tool based upon the newly adopted values and competencies, and their best practices.

Self-Assessment

Methodology

The group, comprised of both liaisons and functional specialists, decided that a self-assessment of competencies would be the best approach to give librarians an opportunity to reflect on their strengths and areas in which they needed to improve their skills and knowledge. The results of this exercise would then inform training needs. In the fall of 2014, a self-assessment survey was created and distributed to the 22 liaison librarians. There was a high response rate with 20 librarians completing the survey. Respondents rated a total of 28 statements. The assessment began with general descriptions of each of the five competency areas followed by a sliding scale to rate how competent liaisons perceived themselves for each one, based directly from the language of the competencies document. See Appendix A to view the self-assessment.

The survey instructions ensured participants' anonymity and results were aggregated so that supervisors would not be able to map the responses to their employees. Participants were instructed at the beginning of the survey that their responses would be combined in "order to develop an overall liaison training program, not to evaluate individual performance." The intent was to encourage an honest self-appraisal for the collective benefit of liaisons overall. An email containing a link to a Qualtrics survey was distributed to all FSU Libraries liaisons.

Results

The first item asked liaisons to rate themselves on the following statement: "I feel competent to perform these duties" for each of the five competencies: 1=minimum perceived competence to 5=perceived high level of competence. On average, liaisons rated themselves with a score of 3 or above for each competency. See *Figure 2*

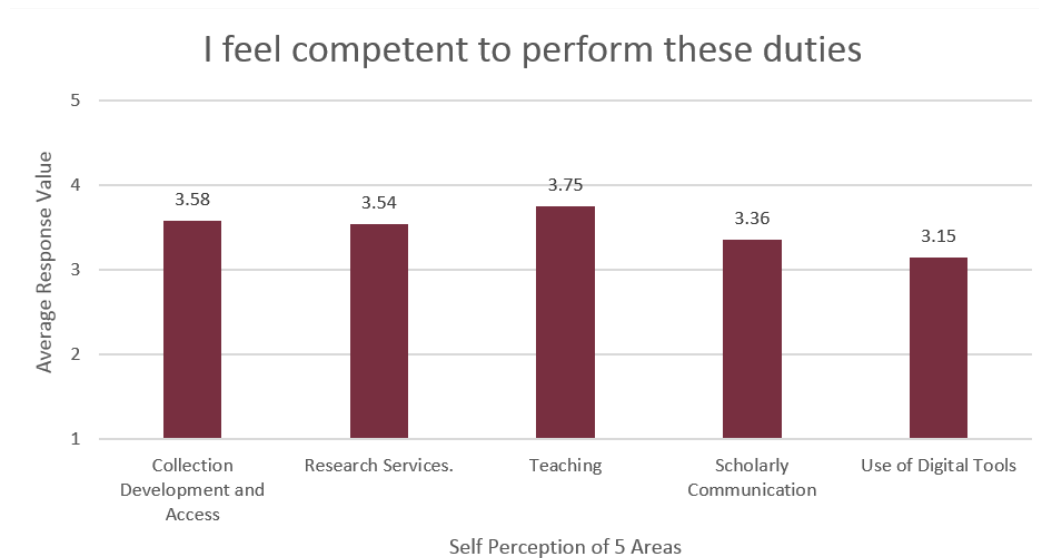


Figure 2: Average mean self-perception response to “I feel competent to perform these duties” for each of the five competencies

Average liaison perceptions of their own performance in each competency fell between a rating of 3 “slightly disagree” and 4 “slightly agree.” This overall rating at the beginning of the survey generally reflects how they collectively responded to each group of competency statements throughout the survey. There are a handful of liaisons that responded with a 5 “agree” or 6 “strongly agree” for some statements within each competency area. A One-Way ANOVA test was conducted to compare the effect of different competency areas on the liaison perceptions of their own performance. There were no significant differences at the $p < .05$ between the means of how liaisons self-rated themselves among all competencies [$F(4, 92) = 1.01, p = 0.4071$]. See Table 1. An eta squared (η^2) test was then implemented to examine the effect size of the One-Way ANOVA, in other words, used to determine how insignificant the means are from each other. As a result, only 4% of the variance is accounted for by the differences, which confirms and aligns with the results from the One-Way ANOVA test. See Table 2.

Table 1. One-Way Analysis of Variance of liaison perceptions of their own performance					
Source	<i>df</i>	<i>Sum of squares</i>	<i>Mean square</i>	<i>F</i>	<i>p</i>
Between groups	4	4.1966	1.0492	1.01	0.4071
within groups	92	95.6840	1.0400		
Total	96	99.8806			

Table 2. Proportion of Variation Accounted for liaison perceptions of their own performance	
Eta Squared (η^2)	0.04

Breakdown of each Competency

Appendix B illustrates the mean responses for each set of statements related to each of the five competencies. Each survey statement related to each competency, and its mean response, is displayed with a rating scale of 1= “strongly disagree,” 2= “disagree,” 3= “slightly disagree,” 4= “slightly agree,” 5= “agree,” to 6 = “strongly agree.” While descriptions showed that the average response for each category ranged between “slightly agree” and “agree,” there were outlier liaisons who did express that they “strongly agreed” or “strongly disagreed” with a competency statement in each area.

Collection Development & Access

Four out of the five statements rating competencies in collection development and access were answered by liaisons between a 4 “slightly agree” and 5 “agree.” On average they “slightly agree” that they are competent to collaborate to support cooperative collection development (4.3) and are aware of research trends/projects within their assigned discipline (4.35). Overall, liaisons stated that they “slightly agree” that they communicate often with faculty about opportunities to order materials (4.25), and that they collaborate with resource sharing professionals to provide users immediate access (4.8). The only statement rating that averaged below a “slightly agree” to “slightly disagree” was for familiarity with the library collection, approval plan, and ordering process (3.95).

Research Services

On average, liaisons perceived their ability to provide in-depth, specialized research consultations between “slightly agree” to “agree” at an average mean of 4.65. The collective competence rating for their abilities to create, refine, and assess research and information services and programs in multiple formats (this can include creating and assessing instruction, research guides, blogs, etc.) was at a mean of 4.7. Research services is the only competency to have no items with a mean of response below 4; therefore, liaisons “slightly agree” to “agree” on average that they consistently collaborate with functional specialists (4.05), partner with individuals and groups of faculty outside the library (4.1), and often create or contribute to research guides and video tutorials (4.2).

Teaching

Liaisons agreed on average that they were competent to create and deliver alternative learning opportunities and to teach strategic information literacy (5). They “slightly agree” to “agree” on average that they understand basic principles of instructional and assignment design (4.8), have the skills and abilities to engage with faculty members (4.45), and develop and execute strategic plans to embed library instruction within particular courses (4). However, on average they “slightly agree” to “slightly disagree” that they regularly assess what students learn (3.75).

Scholarly Communication

The only best practice response related to scholarly communication that received an average rating over 4 “slightly agree” was the perception that liaisons felt competent in understanding issues and trends in that area (4.35). Every other response was a rating of competence between 3 “slightly disagree” to 4 “slightly agree”: monitoring faculty publishing habits (3.6), advising users on copyright matters (3.75), informing and educating faculty about scholarly communication issues (3.95), and promoting the institutional repository (3.95).

Use of Digital Tools

On average, four out of the six statements related to digital tools received a rating over 4 “slightly agree,” with the highest rated response for promoting the use of subject-specific information resources and services (4.5). The two practices that received an average rating between 3 “slightly disagree” to 4 “slightly agree” were for providing consultation and referrals for interdisciplinary research teams (3.6) and promotion of data management tool usage (3.8).

Comparing the Overall Means of the Responses of Each Competency

Comparing the overall means of the responses of each category shows which competencies are perceived as weaker or stronger than others (see figure 3). Overall, liaisons are comfortable with their teaching abilities, but less confident in regards to scholarly communication and digital tools. Four of the five total scholarly communication statements have a mean response value below 4 (“slightly agree”). However, when responses to individual statements for each competency were analyzed separately, a more refined understanding of specific training needs emerged. For example, though liaisons rated digital tools as their lowest competency area in statement one, they actually rated themselves higher when it came to specific digital tool best practices. Teaching had two statements with mean response values of 4 or below even though it had the highest overall mean response. Research services is the only category to have no responses with a mean of 4 or below, and had the second highest overall mean. A One-Way ANOVA test was also conducted to compare the effect of different competency areas on the overall means of the responses of each competency. Again, the overall means in each area are not significantly different from each other [$F(4, 95) = 1.168, p = 0.33$]. See Table 3. Another eta squared (η^2) test was implemented to examine the effect size of the One-Way ANOVA on the competency areas. As a result, only 5% of the variance is accounted for by the overall means of each competency. See Table 4.

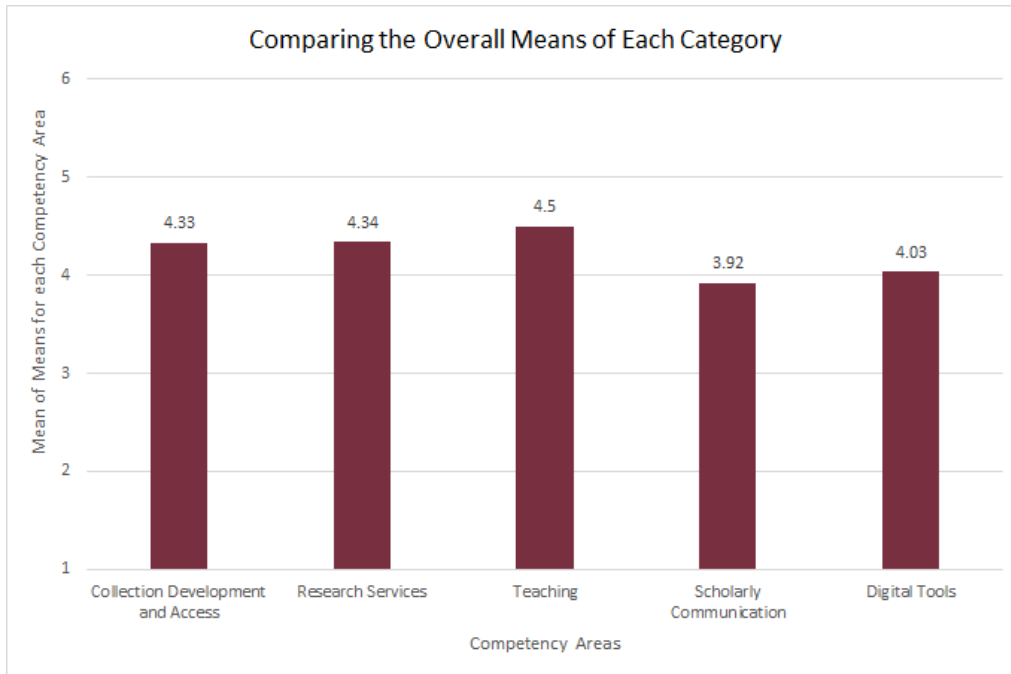


Figure 3: Comparing the Overall Means of Each Category.

A One-Way ANOVA test was conducted to compare the effect of different competency areas on the liaison perceptions of their own performance. There were no significant differences at the $p < .05$ between the means of how liaisons self-rated themselves among all competencies [(F(4, 92) = 1.01, $p = 0.4071$].

Table 3. One-Way Analysis of Variance comparing the overall means in each competency

Source	<i>df</i>	<i>Sum of squares</i>	<i>Mean square</i>	<i>F</i>	<i>p</i>
Between groups	4	4.59	1.1482	1.168	0.33
within groups	95	93.37	0.9829		
Total	99	97.96			

Table 4. Proportion of Variation Accounted for regarding overall means in each competency	
Eta Squared (η^2)	0.05

Comparison of Mean Response Values of 4.0 and Below

For developing a training program, it was important to identify the items for each competency that had a mean of four (“slightly agree”) or below for each of the five competencies. See Appendix B and chart labeled *Items with a Mean Below 4.0*. Scholarly communication was rated with four of its five items having a mean response value below 4. Liaisons rated themselves lower on promoting both the institutional repository and educating/informing faculty of open access issues (3.95). There was even less perceived competence in the area of advising faculty and students on “basic copyright matters.” (3.75), and an even lower mean of 3.6 for “monitoring faculty publishing habits to proactively advocate for open access.” There were two statements having to do with the use of digital tools with a response below the 4 mean threshold: liaisons felt less competent to promote data management tools and provide referrals for interdisciplinary research teams. Interestingly, five of the nine statements with means below 4 have to do with direct faculty interaction. These low self-ratings of engaging faculty in areas of scholarly communication and digital tools were also reflected in the research findings cited in *New Roles for New Times*.²⁷

Validity and Reliability of the Self-Assessment

Using a bivariate correlation matrix, construct validity was tested for the instrument’s five scales which found expected empirical groupings between items in the self-assessment scales in all areas. To test these associations further, a Cronbach’s Alpha was deployed.

Cronbach’s Alpha measures the internal consistency of a self-assessment instrument with the alpha score falling between zero and one, where one represents the highest level of reliability between items. Testing for internal consistency in this study revealed that all scales in the instrument had alpha scores of $\alpha \geq 0.75$. The individual alpha scores for the five-item scale for Collection Development was $\alpha = 0.75$; the five-item scale for Research Services was $\alpha = 0.81$; the six-item scale for Teaching Services was $\alpha = 0.89$; the five-item scale for Scholarly Communications was $\alpha = 0.93$; and the six-item scale for Digital Tools was $\alpha = 0.85$.

Summary of Results

Overall, liaisons were modest about the perceptions of their competencies. Collectively, it was evident that liaisons felt more competent in areas of teaching, collection development and access, and research services. However, there is a definite push to evaluate teaching and measure student learning in the classroom. Liaisons reported not feeling as competent in the areas of scholarly communication

and use of digital tools. While liaisons understood scholarly communication issues, and were more competent in the use of digital tools than perceived, liaisons reported feeling less equipped to engage directly with faculty where promotion, referral, consultancy, and advocacy are needed.

Outcome of Self-Assessment

Once the results of the self-assessment were compiled, a final call was made for subject librarians to participate in the analysis, and to draft a report with training recommendations to address the needs of low-scoring results. At this time, the Subject Librarian Steering Group was formed to implement the recommendations and map a strategic program to support the core competencies.

Implementation Of A Training Program

The Subject Librarian Steering Group created a Google spreadsheet to map the content and direction of the subject librarian training. The spreadsheet displays the title and description of the training event, the date, and the corresponding competency. In this way, the Steering Group can clearly see which competencies and best practices are being addressed and which are not, and make intentional decisions about future development opportunities.

The link to the spreadsheet is posted on the subject librarians' intranet page, and everyone has permission to add and edit; therefore, anyone who organizes or hosts a training or professional development event can track the event in the spreadsheet. The objective is that all subject librarians assume ownership of the training program and participate in its ongoing development and assessment.

All training and professional development opportunities for subject librarians are recorded in the training map (the spreadsheet), whether the events are designed and hosted by the Subject Librarian Steering Group, the University Libraries, or an outside vendor. The objective is improvement of the core competencies regardless of who provides the training. If a training opportunity addresses an identified need from the self-assessment, and relates to one of the core competencies, then it gets recorded in the spreadsheet.

For example, the Subject Librarian Steering Group planned numerous training opportunities for digital tools (a low-scoring competency) in the monthly subject librarian meetings. These training opportunities (e.g., using Zotero, Trello, NVivo, the institutional repository, creating a data management plan, etc.) were all recorded in the training map. The Steering Group also planned and hosted an all-day retreat with sessions addressing digital tools, teaching, and research services. Each of these sessions were included in the training map, while at the same time, seminars hosted by the Office of Scholarly Communication on academic publishing trends, as well as webinars on the Association of College and Research Libraries' Information Literacy Framework²⁸ and ProQuest databases were also included.

The original goal was to track training opportunities with their corresponding competencies over the next two years, intentionally structuring the program based upon the assessment results, and then follow up with a post-assessment to evaluate growth and improvement.

Practice

The implementation of the liaison competencies and the accompanying self-assessment began in 2014 and seemed to coincide with a 300% increase in internal training from 2013 to 2014 (from 83 sessions in 2013 to 333 sessions in 2014). Also notable, is that by 2014, with the hybrid model in operation there are over 160+ reference liaison collaborations, along with an increase in instructional collaborations from 140+ in 2015 to over 155 in 2016. Using a hybrid model that combines liaisons and functional specialists expands the expertise that can be leveraged to more effectively serve the community. In addition, the following examples illustrate how these core competencies, combined with the basic values of engagement, advocacy, and collaboration, are now guiding practice.

- There has been a concerted effort to develop partnerships between liaison librarians and functional specialists who have primary responsibilities for areas such as scholarly communication, assessment, digital scholarship, data management, and distance learning. In some cases, these specialists join liaisons at faculty meetings, in research consultations, in classes or workshops, and in writing articles and presenting at conferences.
- Liaisons partner with the Scholarly Communication Librarian to engage with faculty and students about open access, author rights, and other scholarly publishing issues in orientations, workshops, and informal conversations. They also work together to solicit faculty publications for DigiNole, FSU's research repository, and to provide advice and assistance with questions about publishing and contracts. These partnerships were key in advocacy efforts that led to the Faculty Senate's unanimous passage of an open access policy.
- Data services is a fairly new area for FSU Libraries, and through their contacts with academic departments, liaisons have helped to promote these services and have included the Data Services Librarian in workshops, orientations, and meetings with faculty. In disciplines where data management plans are required as part of grant applications, the Data Services Librarian works with liaisons and faculty on drafting these plans.
- Some liaisons and functional specialists are collaborating on the creation of digital tools. One librarian recently brought together a programmer, the Data Services Librarian, Metadata Librarian, Digital Archivist, and the Digital Scholarship Coordinator to develop an archaeological database with the Anthropology Department.

- The Criminology Librarian co-teaches with a faculty member to embed information literacy instruction in an introductory class for first-year criminology students. A longitudinal study found that students who took the course had higher cumulative GPAs and four-year graduation rates than criminology majors who did not.²⁹ Recently, this course was renamed “Foundations of Research & Inquiry” as a liberal studies course open to all first-year honors students. Liaison librarians from a variety of disciplines co-teach the class.
- Some liaisons are part of research teams with disciplinary faculty and contribute by conducting literature reviews, systematic reviews, and grant applications.
- Library-sponsored boot camps involve multiple liaisons with expertise in different areas. A boot camp for humanities graduate students included special collections librarians presenting on searching for primary resources, a librarian discussing literature searching, and another offering instruction on citation management tools.
- Increasingly, librarians have collaborated on writing articles and presenting at conferences. Liaisons representing the arts, humanities, social sciences, and sciences worked with the Assessment Librarian to analyze the results of an ethnographic study of graduate students and consider ways in which this data might inform decisions about library spaces for graduate students.³⁰ The Data Librarian, Digital Scholarship Librarian, and Scholarly Communication Librarian recently presented on their team approach to providing data services.

Discussion

Diversity of Expertise Required

The shift from focusing on librarian roles to user needs throughout the academic research cycle has broadened the expectations and responsibilities for the liaison librarian. As a result, an equally expansive set of new tools and skills are required - technical as well as interpersonal and leadership skills. As a result of the necessary training, liaisons begin to see themselves as authoritative partners at strategic points in the research process; however, the diversity of expertise required contributes to more demands that liaisons will have to meet.³¹ This raises a number of questions, such as how to deal with increased demands and expectations while still maintaining previous responsibilities. Should there be concern about liaison burn-out by being spread too thin? Or, does the hybrid model make it possible to assume new responsibilities?

Because the subject librarian role is expanding within the organization, core competencies and best practices must also remain in a state of evolution and refinement. At this time, the adopted values and competencies remain central to organizational identity and strategic initiatives, and do not need to be revised; although, they may need to be modified in the future if the educational environment

requires change. Best practices for each of the core competencies, however, did require updating and were recently refined.

Recommendations to those using this model:

- It is helpful to conduct an environmental scan of what other libraries have adopted as competencies, but be aware that you need to consider the unique context of your own institution.
- Invite your larger group of liaisons to review the documents and allow them to give input, ideas, and pose questions in an open forum. This also can facilitate consensus on the competencies themselves. Be prepared to compose multiple drafts of your competencies as they evolve.
- Remind everyone that the competencies are guideposts and best practices, and that no one is expected to be an expert in all areas.
- Keep the questions of the self-assessment consistent so that you can measure whether self-perceptions of competencies improve from one administration to the next.
- Gather experts who can advise and collaborate on the creation of competency best practices and the corresponding assessment questions.

Importance of Assessment in Liaison Work

As roles and expectations expand, assessment of liaisons, both internally and externally, is necessary to determine if training is required.³² Self-assessment is one assessment tool to use, and in this case, proved to be an appropriate tool to encourage individual reflection on competencies as they related to liaison professional development.³³ However, the self-assessment results from this study were subject to respondent bias. For example, what do the modest answers mean? With self-assessment, participants tend to either naturally over-rate their abilities in some areas and under-rate them in others.³⁴ One way to address blind-spots in the future is to externally assess the liaison program by surveying faculty perceptions of liaison competencies, or to set up peer-to-peer evaluation in addition to the self-assessment instrument. It is also likely that faculty may not be aware of the expanding roles of liaison librarians, and an assessment of faculty perceptions and expectations would help determine both of these.³⁵

Future Directions

This study has prompted a number of ideas for follow-up and additional research. First of all, a post assessment to understand if liaison self-perception has improved as a result of the new training initiatives is planned, though it will be difficult to directly link gains made from training initiatives alone. This will also provide a baseline assessment of the competencies of recently-hired liaisons. There were some confusing aspects to the original survey, and so the Subject Librarian Steering Group will review

both the survey instructions and statements/questions, and revise as needed. Plans also include an assessments of faculty members in order to understand external perceptions and expectations of liaison competencies.

Finally, discussions have revolved around developing a rubric to show levels of competencies (i.e., baseline, intermediate, advanced). While not everyone is expected to be experts at all of the competencies and their best practices, there is a need for greater clarity and structure when discussing professional performance. A rubric might add that clarity, as well as aid liaisons in both formal and self-evaluation.

Conclusion

The adoption of a set of defining values and core competencies helped to reconceptualize the liaison program at FSU Libraries. Values guide practice and the core competencies provide benchmarks for superior service and structure for training and development. In particular, the hybrid model of liaisons and functional experts collaborating on research projects has improved engagement with students and faculty in the “entire lifecycle of the research, teaching, and learning process”.³⁶ The self-assessment oriented FSU liaisons to the values and competencies, and informed the development of a strategic training program. Continued assessment and mapping of the training program will ensure alignment with those values and competencies.

Finally, it should be pointed out that a total of thirteen different subject librarians participated in some manner throughout the duration of the three-phase project, and that the larger liaison group was involved in multiple conversations. It was believed that involving subject librarians in the creation of the core values, competencies, and training initiatives would lead to greater ownership and engagement. At each stage in the project, updates were given at subject librarian meetings where there were opportunities for dialogue and feedback. These meetings provided an avenue for librarians to join working groups in each subsequent phase of the project, encouraging maximum representation of the different areas within the library. This grassroots initiative was managed by a diverse group of liaisons seeking to improve services and provide clarity and strategy to their training, development, and goal-setting. It is an example of a process for reconceptualizing liaison roles that could be applied in other university library settings.

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Appendix A

FSU Libraries Liaison Librarian Self Assessment*

*Note that subject librarians were formally called “liaisons” during the survey implementation.

Instructions:

Read each of the five liaison competency descriptions. Then, hover and select the blue slider button (indicated by the red arrow) and slide it to best reflect your perception from 1 -5 (1=perceive little or no competence to 5=perceive high competence in this area) for each competency area.

Liaison competencies

Research services: liaisons actively participate in the research of their assigned departments. They engage faculty and students throughout the entire research life cycle. Liaisons know what constitutes successful research and they develop a strong understanding of the research development processes and output in assigned disciplines.

Scholarly communication: liaisons function as both advocates and consultants for changes in academic publishing, including shifts toward open access, and expanded understanding of author rights, and the practical implications of research compliance related to dissemination of research.

Use of digital tools: the liaison promotes the use of subject-specific information resources and services to meet user needs and expectations, utilizing current technologies and digital information tools.

Teaching: the liaison collaborates with colleagues within and beyond the libraries to implement strategic information literacy instruction that supports university curriculum and student research.

Collection development and access: the liaison develops and manages collections and works to provide on-demand access to content to support research and teaching in assigned subject areas.

I feel competent to perform these duties (slide from 1 minimum perceived competence -5 for high perceived competence for each of the five areas)

(slider scale provided in qualtrics) set to one decimal.

For the next set of questions please rate your perceived level of competency using a sample list of best practices for each area. Refer to the descriptions for each area provided above:

Collection Development and Access BEST PRACTICES

1. I communicate often with faculty members about opportunities to order materials.

strongly agree

agree

slightly agree

slightly disagree

disagree

strongly disagree

2. I am familiar with the library collection, approval plans, and the ordering process.

strongly agree

agree

slightly agree

slightly disagree

disagree

strongly disagree

3. I am aware of research trends and projects within my assigned discipline.

strongly agree

agree

slightly agree

slightly disagree

strongly disagree

4. I collaborate with others to support cooperative collection development.

strongly agree

agree

slightly agree

slightly disagree

disagree

strongly disagree

5. I collaborate with resource sharing professionals (UBorrow/ILL) to provide users with immediate access to content.

strongly agree

agree

slightly agree

slightly disagree

disagree

strongly disagree

Research Services BEST PRACTICES

1. I can create, refine, and assess research and information services and programs in multiple formats (this includes) creating and assessing instruction, research guides, blogs, etc.

strongly agree

agree

slightly agree

slightly disagree

disagree

strongly disagree

2. I often provide in-depth, specialized research consultation and reference to students or faculty for assigned subject areas:

strongly agree

agree

slightly agree

slightly disagree

disagree

strongly disagree

3. I partner with individual or groups of faculty outside the library on collection development projects, initiatives for teaching and learning, or grants and research projects

strongly agree

agree

slightly agree

slightly disagree

disagree

strongly disagree

4. I consistently collaborate with functional specialists (e.g. data, technology, copyright specialists) to provide more in-depth research services on research teams.

strongly agree

agree

slightly agree

slightly disagree

disagree

strongly disagree

5. I often create or contribute to research guides, video tutorials, research blogs, or other unique learning objects.

strongly agree

agree

slightly agree

slightly disagree

disagree

strongly disagree

Teaching BEST PRACTICES

1. I am competent in teaching strategic information literacy that supports university curriculum and student research.

strongly agree

agree

slightly agree

slightly disagree

disagree

strongly disagree

2.I understand basic principles of instructional and assignment design appropriate to information literacy instruction.

strongly agree

agree

slightly agree

slightly disagree

disagree

strongly disagree

3.I have the skills and abilities to engage with faculty members to integrate information literacy into the curriculum.

strongly agree

agree

slightly agree

slightly disagree

disagree

strongly disagree

4. I am able to create and deliver alternative learning opportunities via research guides, consultations and video tutorials.

strongly agree

agree

slightly agree

slightly disagree

disagree

strongly disagree

5. I regularly assess what students learn and use that information to improve my teaching.

strongly agree

agree

slightly agree

slightly disagree

disagree

strongly disagree

6. I am confident in my ability to develop and execute strategic plans to embed library instruction within particular courses in assigned subject areas.

strongly agree

agree

slightly agree

slightly disagree

disagree

strongly disagree

Scholarly Communication BEST PRACTICES:

1. I am competent in understanding issues and trends in Scholarly Communication.

strongly agree

agree

slightly agree

slightly disagree

disagree

strongly disagree

2. I inform and educate faculty about scholarly communication issues including: author's rights, benefits of open access, metrics and measurement, ease of open access archiving, research data management and the changing structures of academic publishing.

strongly agree

agree

slightly agree

slightly disagree

disagree

strongly disagree

3. I promote DigiNole Commons and refer faculty and students to appropriate staff who can assist with depositing materials into the institutional repository.

strongly agree

agree

slightly agree

slightly disagree

disagree

strongly disagree

4. I monitor faculty publishing habits in my liaison areas and proactively advocate for open access archiving and its benefits.

strongly agree

agree

slightly agree

slightly disagree

disagree

strongly disagree

5. I advocate for sustainable models of scholarly communication, including open access.

strongly agree

agree

slightly agree

slightly disagree

disagree

strongly disagree

6. I advise faculty and students on basic copyright matters related to academic publications.

strongly agree

agree

slightly agree

slightly disagree

disagree

strongly disagree

Digital Tools BEST PRACTICES:

1. I am competent in promoting the use of subject-specific information resources and services to meet user needs and expectations, as well as, in utilizing current technologies and digital information tools.

strongly agree

agree

slightly agree

slightly disagree

disagree

strongly disagree

2. I promote new online learning and digital tools to place the library more deeply into the flow of teaching, learning and research.

strongly agree

agree

slightly agree

slightly disagree

disagree

strongly disagree

3. I engage in the coordination and integration of online tools in support of teaching, learning and research.

strongly agree
agree
slightly agree
slightly disagree
disagree
strongly disagree

4. I collaborate with functional specialists within the libraries and beyond to provide effective digital tools for assigned subject areas.

strongly agree
agree
slightly agree
slightly disagree
disagree
strongly disagree

5. I provide consultation and referrals for interdisciplinary research teams.

strongly agree
agree
slightly agree
slightly disagree
disagree
strongly disagree

6. I promote the use of data management tools to faculty, researchers and students.

strongly agree

agree

slightly agree

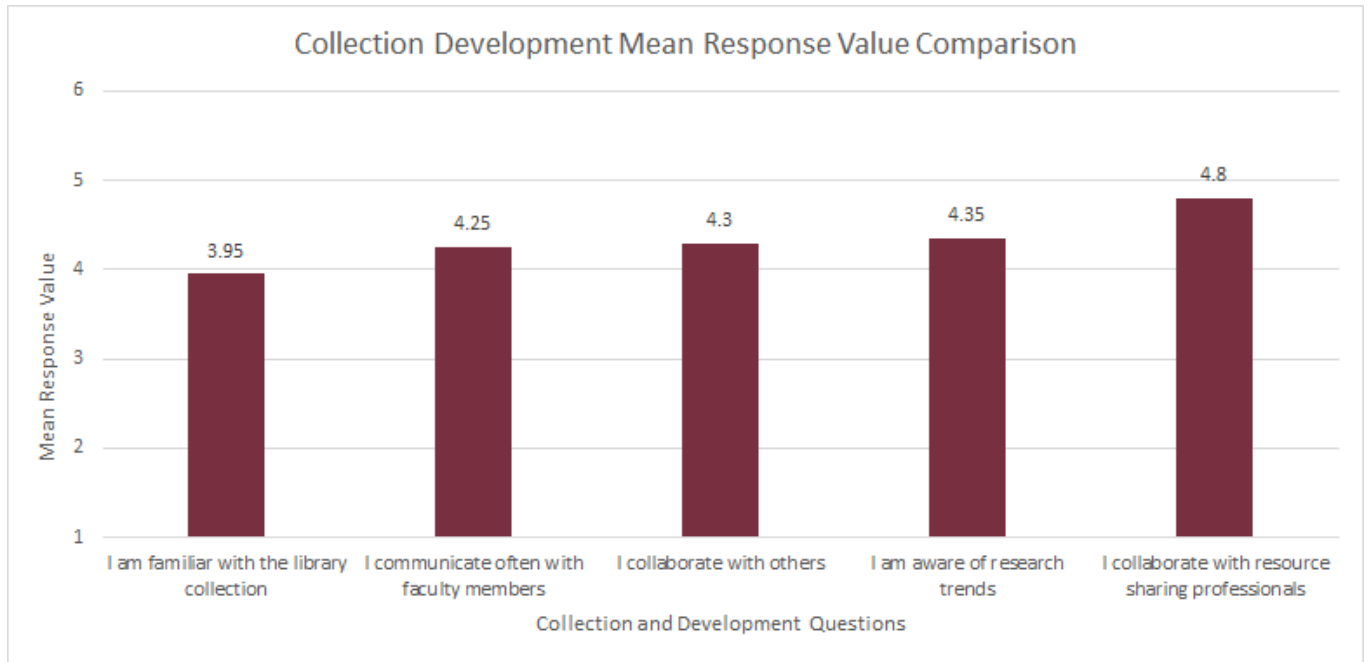
slightly disagree

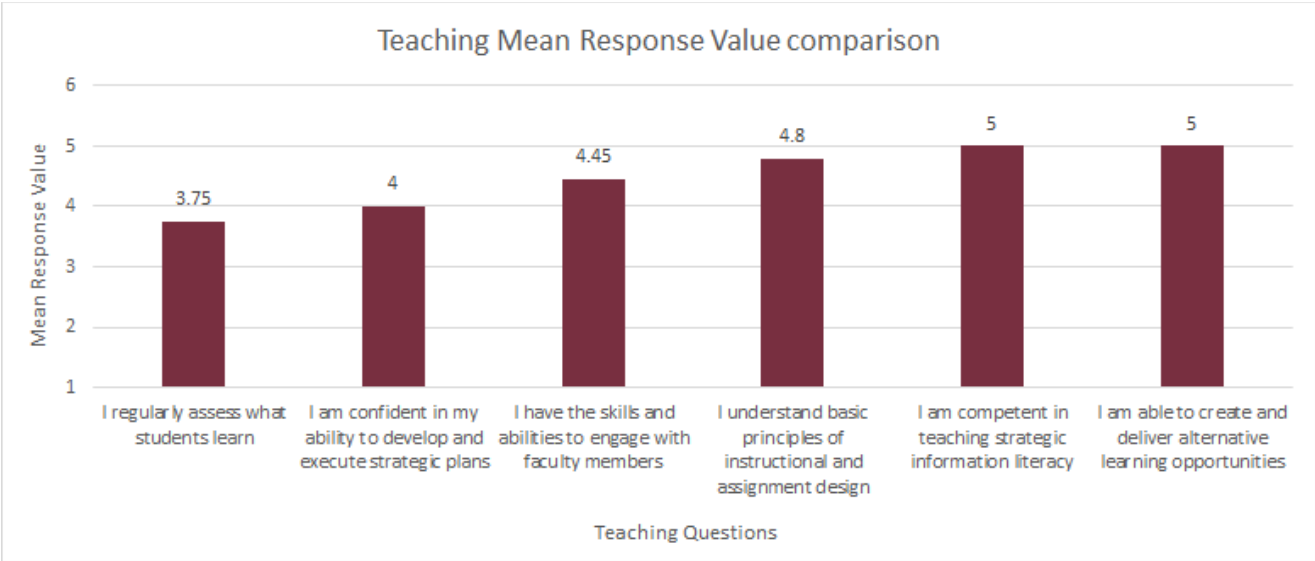
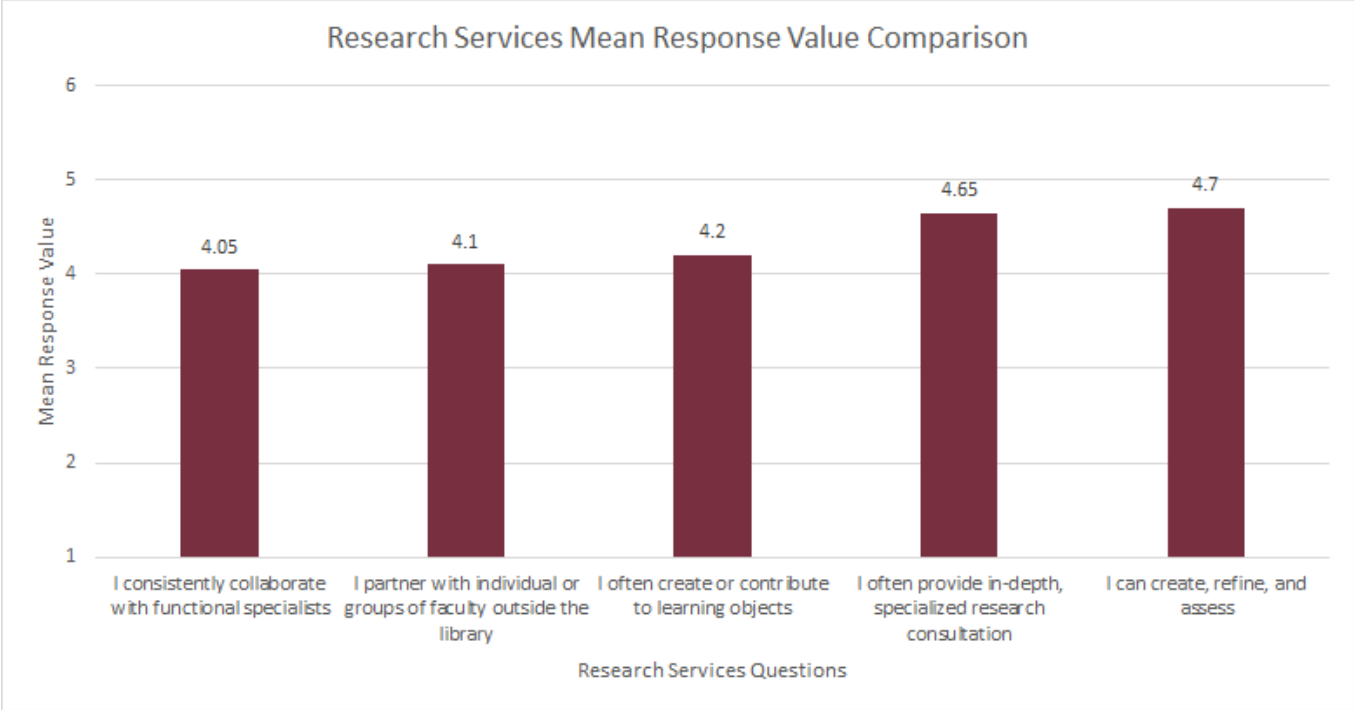
disagree

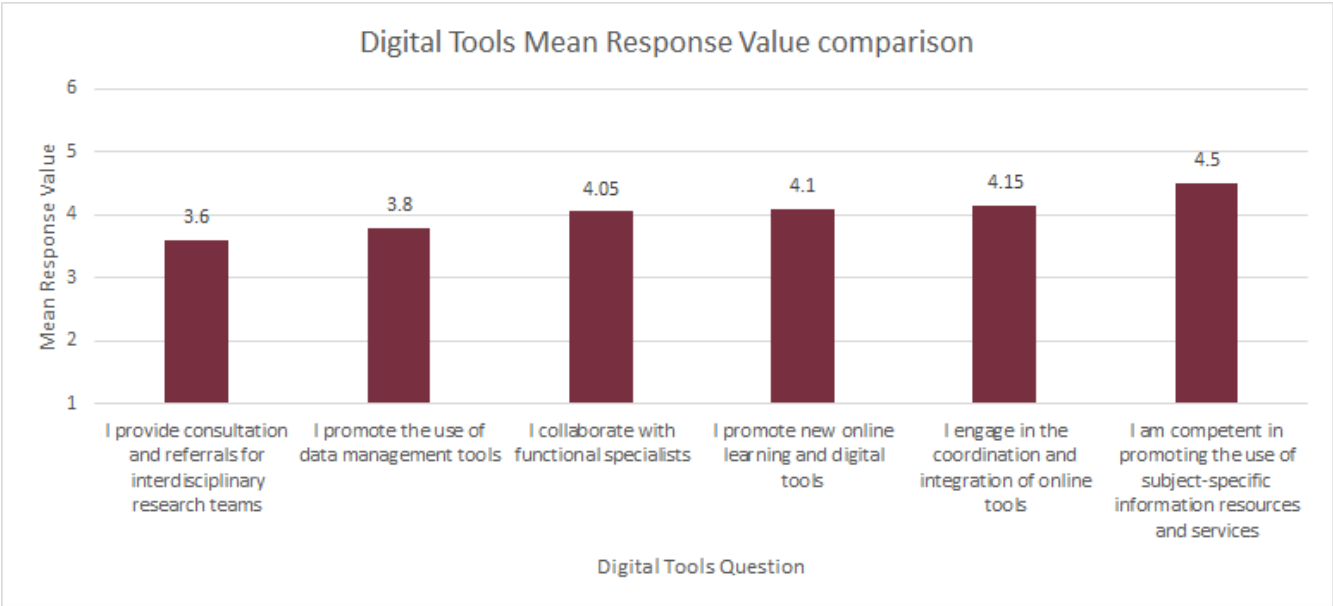
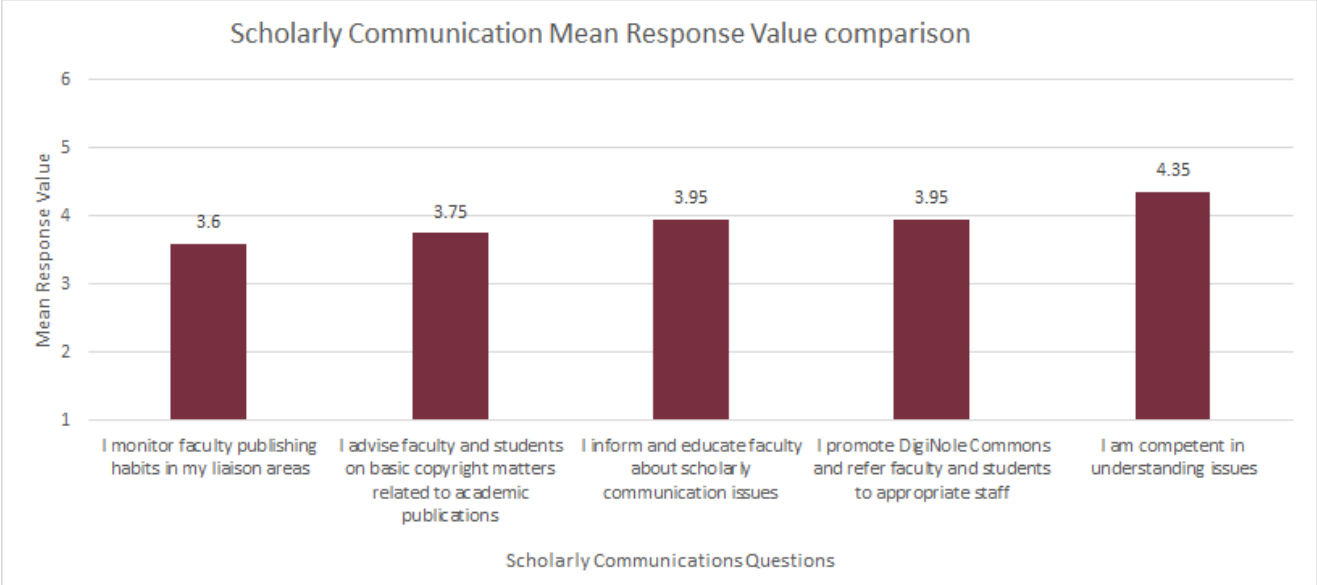
strongly disagree

Appendix B

The following five figures summarize the mean ratings responses for each statement for all five competencies beginning with Collection Development and ending with Digital Tools statements.







Items With A Mean Below 4.0

