

# New Roles for New Times:

## Transforming Liaison Roles in Research Libraries

August 2013

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Available for download at <http://www.arl.org/component/content/article/6/2893>

Published by the  
Association of Research Libraries  
Washington, DC 20036  
[www.arl.org](http://www.arl.org)



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## Introduction

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Powerful forces transforming higher education are prompting a fresh examination of liaison librarian roles in research libraries. These forces include new and rapidly changing technologies, an abundance of digital information in myriad formats, an increased understanding of how students learn, evolving research methods, and changing practices in how scholars communicate and disseminate their research and creative work. In the past, libraries focused largely on capturing the end products of scholarship, and the bibliographer model was designed to fulfill that goal. Then, the liaison model evolved, recognizing the need for advanced library research assistance within the disciplines and instruction in general library research processes for students. With increasing pressure on researchers to plan and manage their output, and a growing adoption of open access publishing, research libraries are now compelled to understand and support all processes of instruction and scholarship, which calls for an engagement model. An engaged liaison seeks to enhance scholar productivity, to empower learners, and to participate in the entire lifecycle of the research, teaching, and learning process.

Engagement requires an outward focus. By understanding the changing needs and practices of scholars and students, librarians can help shape future directions for the library and advance the library's mission within the larger institution. Building strong relationships with faculty and other campus professionals, and establishing collaborative partnerships within and across institutions, are necessary building blocks to librarians' success. In a traditional liaison model, librarians use their subject knowledge to select books and journals and teach guest lectures. While these are important activities, they are no longer sufficient to effect change. A liaison who understands how scholars in a particular discipline communicate and share information with one another can inform the design and development of new publishing services, such as digital institutional repositories. A librarian who monitors the curriculum of a degree program and pedagogical norms of a discipline can help shape the development of scalable models that integrate 21st-century literacies into a learner's universe. Many scholars are generating untold quantities of digital data, while others produce multimedia works. All are struggling with data management and preservation plans. Librarians need to be positioned to help solve these large-scale challenges.

While there is general agreement that liaison roles are changing, research libraries are grappling with the scope of these new roles. Identifying emerging roles, determining what work to divest of, designing supportive institutional structures, establishing areas of primacy and leadership on campus, and ensuring that liaisons have needed skills and knowledge all present collective and urgent challenges. As Karla [Hahn] Strieb notes, "Liaisons cannot be experts themselves in each new capability, but knowing when to call in a colleague, or how to describe appropriate expert capabilities to faculty, will be key to the new liaison role. Just as researchers are often working in teams to leverage compatible expertise, liaison librarians will need to be team builders among library experts where this advances client research."<sup>1</sup> Interdisciplinary research teams on campus will benefit from an interdisciplinary staff of library professionals.

Through interviews with administrators at five ARL libraries (Duke University, University of Guelph, Massachusetts Institute of Technology, North Carolina State University, and Purdue University), and the authors' own extensive experience in research libraries, this report identifies six trends in the development of new roles for library liaisons, noting that user engagement is a driving factor in identifying which services are, or should be, offered by research libraries. The overarching framework for all changes is an increasing focus on what *users* do (research, teaching, and learning) rather than on what *librarians* do (collections, reference, library instruction). The authors also began to question the liaison model as the overarching structure, noting the limitations to individual expertise. There appears to be a trend toward a hybrid model, where liaisons pair their expertise with that of functional specialists, both within and outside of libraries. In addition, an ALA-accredited master's degree in library science is no longer strictly required. Increasingly, liaisons and functional specialists present a wide range of educational backgrounds and advanced degrees that offer

diverse perspectives and broader skill sets, further challenging the concept of who and what a librarian or liaison is.

## Trend 1: Develop user-centered library services.

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### Collection Development

The traditional tripartite definition of liaison work as collection development, reference, and library instruction is being completely reconceived; with the user at the center of library services, each area is undergoing radical change. While the purpose of collection development remains the same, the definitions of success in this area are changing radically. A recent ARL Issue Brief, “21st-Century Collections: Calibration of Investment and Collaborative Action,” provides an excellent overview of the new terrain in which research libraries find themselves:

Twentieth-century research library collections were defined by local holdings, hailed as distinctive and vast. Twenty-first-century research library collections demand multiple strategies for ensuring broad access. Never before have we been required to grasp so many dimensions of research in order to make wise decisions. In a networked world, local collections as ends in themselves make learning fragmentary and incomplete. Twenty-first-century collection management will therefore require increased collaboration within and among institutions, as well as a shift from thinking of collections as products to understanding collections as components of the academy’s knowledge resources. A multi-institutional approach is the only one that now makes sense. But the purpose of collections remains the same: to support the creation and dissemination of new knowledge.<sup>2</sup>

Although research libraries are keenly aware of key factors affecting the future development and management of collections and the need for different strategies, they are grappling with how to best do this. For example, some libraries are effectively eliminating or greatly reducing individual selection in some areas. They rely on approval plans and demand-driven acquisition of electronic books to automate collection development and more closely align purchases with expressed user needs and requests. The feasibility of this approach varies by discipline. Other libraries are centralizing collection development so that a selector works in concert with departmental liaisons and covers a much broader range of disciplines than the traditional bibliographer once did. In this model, two librarians may work with an academic department rather than relying on a single liaison to meet all needs. Another approach has liaisons redirecting their collection development efforts to semi-rare materials and new formats that require the subject expertise of a liaison librarian to identify and collect. Recent analyses of collection circulation data have revealed that as much as half of carefully developed print collections have not circulated for as long as data are available. Rather than devote premium campus space to housing uncirculated materials, libraries are participating in regional conversations about shared or “collective collections” in order to meet new and emerging needs for library space and to preserve valuable but underused print materials.

ARL’s “21st-Century Collections” Issue Brief presents a number of actions that will be necessary for 21st-century collection development. This ranges from developing a shared vision among institutions to enable collective action to developing metrics needed to demonstrate to the research community what libraries are doing for them. The authors of the Issue Brief note that “the enduring need within the library for deep subject expertise will increasingly be met by teamwork and cross-institutional partnerships.” After a cautionary reminder that the library enterprise is not too big to fail, the Issue Brief closes on an optimistic note:

Scholars already collaborate; libraries need to make it easier for them to do so. Research libraries are well positioned to take a strong role in the development of new business and selection models.

Publishers that emphasize data- and user-driven approaches will attract a growing proportion of collection dollars. Research libraries able to see their collection activities through this analytical lens have the brightest prospects to make the full range of collections available to users; to be effective partners with faculty and students in teaching, research, and learning; and to be the most successful long-term custodians of the scholarly record.<sup>3</sup>

Who will do this new work? “21st-Century Collections” reinforces the need to make all library staff aware of the changing higher education environment, placing local situations into national and global contexts. Fortunately, libraries report that there is less resistance from librarians to this changing approach to collection development and management than there was even a few years ago. For many newer liaisons, these new roles and approaches have always been the norm, and some experienced librarians welcome new responsibilities and any institutional support to redirect their efforts. However, there are still some librarians for whom traditional collection development—more than any other activity—defined their professional identity and who continue to struggle with the changing expectations expressed in “21st-Century Collections.” Administrators are wise to understand and respond to the natural range of emotions that accompany significant change, foster the right structures and support and develop liaisons’ skills to effect partnerships with faculty and across the institution.

## Reference Desk Services

In many research libraries, librarians no longer serve or have greatly reduced their time at in-person reference desks. Instead, highly trained staff offer a wide variety of services at combined service points and make referrals when special expertise is needed. Many libraries are challenged to brand such a service point, citing a “hub” or “center” to refer to services that can include circulation, reference, computer support, writing assistance, and more.

For liaisons, time at a reference desk has been replaced by anticipating recurrent needs and developing easily accessible online materials (e.g., LibGuides, screencasts) available to anyone at any time, and by providing more advanced one-on-one consultations with students, instructors, and researchers who need expert help. Liaisons not only answer questions using library resources, but they also advise and collaborate on issues of copyright, scholarly communication, data management, knowledge management, and information literacy. The base level of knowledge that a liaison must possess is much broader than familiarity with a reference collection or facility with online searching; instead, they must constantly keep up with evolving pedagogies and research methods, rapidly developing tools, technologies, and ever-changing policies that facilitate and inform teaching, learning, and research in their assigned disciplines. They do not have to be experts in these areas, as discussed later in this report, but they do have to maintain a fundamental understanding, recognizing possible solutions to specific needs and making referrals to experts when necessary.

## Library Instruction

In many research libraries, programmatic efforts with information literacy have been too narrowly defined. It is not unusual for libraries to focus on freshman writing programs and a series of “one-shot” or invited guest lectures in individual courses. While many librarians have become excellent teachers, traditional one-shot, in-person instructional sessions can vary in quality depending on the training librarians have received in this arena; and they neither scale well nor do they necessarily address broader curricular goals. Librarians at many institutions are now focusing on collaborating with faculty to develop thoughtful assignments and provide online instructional materials that are built into key courses within a curriculum and provide scaffolding to help students develop library research skills over the course of their academic careers. Purdue

University Libraries noted that they are critically examining where faculty already address some information literacy competencies and whether students come to college equipped with certain skills.

Several barriers have made for a slow transition in instruction. Like faculty, librarians do not necessarily have the pedagogical background to advise on effective teaching methods and assignments related to library content, and even when they do, faculty do not necessarily recognize or value that expertise. The one-shot model is familiar and easy for faculty to incorporate into the syllabus. And many libraries stated that they lack instructional designers and/or educational technologists on their staff, limiting the development of interactive online learning modules and tutorials.

## Staff Supervision

In addition to radical changes in the three core areas of established liaison librarianship, several libraries mentioned that librarians are no longer supervising library assistants and other staff. For example, at both Purdue University and the University of Minnesota, all staff in branch libraries are supervised by an operations coordinator or manager and not by the branch librarians themselves. This move away from supervision allows the librarians to focus on their liaison responsibilities rather than on the day-to-day operations of a library and its attendant personnel needs.

## Trend 2: A hybrid model of liaison and functional specialist is emerging.

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A hybrid model combining elements of the roles of liaisons and functional specialist or experts is emerging. Most of the libraries interviewed continue to embrace a liaison model in which subject librarians are assigned to academic departments, institutes, and research centers. Such liaisons have a basic level of knowledge and skills across a broad range of issues and areas. They are able to effectively support teaching, learning, and research; identify opportunities for further development of tools and services; and connect students, staff, and faculty to deeper expertise when needed. This model has enjoyed much success, and the deep networks formed across disciplines and academic departments are often genuinely valued by the students and faculty and envied by other campus professionals. At many institutions, therefore, the conversation has focused on how to supplement and support the liaison model with other staff. Other institutions have decided to forego the liaison model altogether for one with functional specialists—still with the recognition that roles are changing.

At some libraries, the hybrid exists within the liaison structure, where liaisons also devote a portion of their time (e.g., 20% or more) to an additional area of expertise, for example digital humanities and scholarly communication, and may work with liaisons across all disciplinary areas.

All of the libraries interviewed have functional specialists who do not have liaison assignments to specific academic departments but instead serve as “superliaisons” to other librarians and to the entire campus. Current specialist areas of expertise include copyright, geographic information systems (GIS), media production and integration, distributed education or e-learning, data management, emerging technologies, user experience, instructional design, and bioinformatics. This dedication of resources to specific areas of proficiency is an indicator of arenas in which research libraries are assuming leadership, or at least well-defined partnership roles on campus. Libraries are identifying gaps in the services required to support teaching, learning, and research, and are responding in new and critical ways.

At the University of Guelph, the liaison model was abandoned altogether in favor of a functional-specialist approach. Guelph has 20,000 students and is a small ARL library. They found that the liaison model was not sustainable; they did not have a sufficient number of liaisons to serve all departments and colleges consistently nor “could the librarians represent all services to a high degree of specialization.”

When it came to emerging services such as scholarly communications, digital research platforms, curriculum development, and user-experience based service developments the librarians did not have “the depth of expertise needed to partner with faculty at the desired level.” Some liaison librarians felt they were being asked to be a “jack of all trades and master of none.” As a result, in 2008–2009, Guelph adopted a new model divided into five areas of functional specialization: information resources and collections management; information literacy, instruction, and curriculum development; discovery and access; archival and special collections; scholarly communication and the research enterprise. Different library experts focus on individual faculty needs and interests, so many different librarians may work with one academic department.

### Trend 3: Organizational flexibility must meet changing user needs.

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In today’s environment, libraries often find themselves defining, occupying, and redefining new roles at the same time. In 2008, for example, the University of Minnesota Libraries created the E-Science and Data Services Collaborative, which included liaisons, information technology staff, and a technical services librarian with metadata experience. The formation of this group was prompted by the recognition that large-scale science (and social sciences using related research methods) was now more collaborative, networked, global, and would require access to very large data collections and very large-scale computing resources. Staff anticipated opportunities for services and support to these researchers, but needed to better understand this arena in order to position their expertise. This group provided staff education for their colleagues and identified several campus needs for e-science infrastructure. Along the way, the Libraries realized that focusing on the sciences was too narrow, and two years later they broadened the scope, recasting the group as the E-Scholarship Collaborative. This change was inclusive of burgeoning movements like digital humanities, which has some of the same needs and challenges as those seen in the sciences, but some very different challenges as well. Another year of work led to the understanding that focusing on the electronic aspects of the research process was again too narrow, and it did not reflect how scholars and researchers view their work. As a result, exploratory groups were formed as part of a Research Support Services Collaborative, which, in partnership with allied colleges and campus support units, sought to identify current and emerging research support needs not presently met on campus. By offering education and consultation opportunities for researchers across the disciplines, fostering the development of research community networks, and providing support for research data management and access, the libraries and partners aspire to meet the demands of 21st-century scholarship.

The interviews conducted for this report surfaced numerous other examples of emerging roles that continue to develop and evolve. As noted in the Minnesota example, the fact that research libraries continuously adjust these roles reflects how libraries’ parent institutions must constantly adapt to changes in disciplinary approaches to teaching, learning, and research, as well as the new opportunities that advancing technology present. The evolution of each role requires ongoing resources, new collaborations, and regular re-skilling. It also requires flexibility and openness to change that is truly unprecedented in academic research libraries.

### New Roles in Research Services

Research Libraries UK (RLUK) commissioned a report in 2012 on re-skilling of librarians to meet new and emerging needs in the research support arena. The report preface notes:

It is clear that as the nature of research within our institutions changes, so must the role of the library in supporting research. The increasingly competitive research environment demands greater collaboration (across disciplines, institutional, and national boundaries) and generates greater

quantities of data than ever before. In addition, funders are placing increased emphasis on the demonstration of the impact of research outputs and engendering wide dissemination of research findings. As research activities evolve, research support must evolve with it. There has been much debate within libraries as to what form this evolution will take—but little consensus in terms of the part to be played by the library in general or the role of library staff members in particular.<sup>4</sup>

Many of the libraries interviewed for this report discussed ways to support a shifting range of needs related to research. Several noted an increased focus on supporting interdisciplinary research, assisting faculty who are branching out into new disciplines but are unfamiliar with key articles, core journals, and potential collaborators. Liaisons can play a role in shortening their learning curve and connecting them directly with the information and resources they need. MIT notes that liaisons can “see linkages and connect researchers across disciplines.” For many libraries, offering support for interdisciplinary research is one of many responsibilities in a liaison’s repertoire. But for others, a more formal framework is being considered, so that instructional programming and outreach are ensured in key interdisciplinary areas (e.g., connecting energy and the life sciences). Campuses are also focused on implementing a variety of expertise databases, such as VIVO, Profiles, and SciVal Experts, to facilitate the identification of discipline-specific researchers and enhance collaboration; and at a number of institutions libraries are supporting these initiatives with everything from funding to workshops to creating faculty profiles. In addition, interviewees mentioned the need for liaisons to work directly with research teams to support their information discovery, management, creation and dissemination, although this appears to be more a recognition of need than provision of actual support at most libraries.

Recent mandates from federal funding agencies for data management plans have also prompted new services and tools to assist researchers in understanding and managing the data lifecycle. Liaisons can bring their understanding of the research methods in their assigned disciplines to bear on this process, considering the size and formats of the data produced (e.g., computer models, as well as oral histories that may be captured as video) and the availability of disciplinary repositories. A data management specialist may team up with liaisons to provide more depth of expertise during workshops and consultations. They may also collaborate with IT staff to focus on the development of online tools to support this work.

At Purdue University Libraries, liaisons with the title Research Scientist apply traditional information science to research projects with faculty. They support a range of needs related to e-science (i.e., computationally intensive and collaborative research), and actively pursue grant funding to develop services and tools such as the recent Databib (<http://databib.org>), an online registry that identifies and locates online repositories of research data. In addition, they have liaison assignments to specific academic departments.

Librarians at the University of Minnesota provide education and consultation services for personal information management. Tools, workshops, websites, and individual consults are offered in areas such as citation management, productivity tools, managing alerts and feeds, personal archiving, and using social networking for teaching and professional development.

## Digital Humanities

Libraries are just starting to focus on identifying opportunities to support faculty and graduate student work in the digital humanities, and liaison skills are only beginning to be defined to support this specialty. Some skills are already present among liaisons, such as working differently in the collections arena, negotiating license conditions that allow text mining, and using the collections budget to purchase or provide access to source materials for digital humanities projects. Newer roles include serving as a catalyst or coordinator for campus digital humanities activity, electronic-text services, metadata services, and copyright consultation.

At Duke, new initiatives in humanistic research and teaching are changing the nature and frequency of partnerships between faculty and the Libraries. In particular, cross-disciplinary Humanities Laboratories (<http://fhi.duke.edu/labs>), supported by the John Hope Franklin Humanities Institute and the Andrew W. Mellon Foundation-funded Humanities Writ Large project, have allowed liaisons to partner with faculty to develop and curate new forms of scholarship. To date, Duke University Libraries have sponsored workshops, speaker series, and consultations on a range of topics, such as how to use social media to effectively communicate academic research and how to mark up historical texts using the Text Encoding Initiative (TEI) guidelines. Librarians work directly with faculty, students, and other campus stakeholders to create services and training that support the digital humanities. Data and digital resources produced by these campus initiatives present librarians with a unique opportunity to learn about and advise faculty how to provide persistent, secure, and copyright-compliant access to the digital research underlying their scholarship.

The RLUK report identified a wide skills gap in nine key areas where future involvement of liaisons is considered important now and expected to grow. The nine areas were all known and discussed by the libraries interviewed for this report, suggesting that it is time for institutions to decide whether they can meet these growing needs by retraining existing staff, if they need to hire for this expertise, or a combination of both.

## Expanding Roles in Support of Teaching and Learning

Libraries recognize the importance of their role in supporting teaching and learning, yet they also recognize that they cannot scale a librarian's physical presence in the classroom. Librarians have begun to make choices about when a one-shot or other type of physical presence will best accomplish the desired learning outcomes, and when another method should be used. But this approach needs to accelerate quickly if libraries want to have broad impact on student learning. Most of those interviewed mentioned the need to develop online learning modules, tutorials, short videos and screencasts as a critical part of expanding programmatic effort and integrating into the curriculum. However, libraries varied greatly in their capacity to develop such tools, citing the need for instructional designers and educational technologists that they did not currently have on staff.

An understanding of signature disciplinary pedagogies, where they exist, helps librarians to embed either themselves or valuable content into teaching and learning experiences. For example, the practice of medicine is taught in clinical rounds. While librarians cannot attend all clinical rounds, they can participate in some and can develop educational materials that teach medical students and residents how to find relevant medical information at point of need—often using mobile devices and services. Case studies are used by a number of disciplines including public affairs, business, law, and undergraduate leadership development. Working on cases requires students to research and evaluate multiple sources of data, fostering information literacy skills. At the University of Minnesota, a theater arts faculty member asked the libraries to license a series of streaming Shakespearean plays. His students watch the videos before coming to class, freeing up class time for actual performance and supporting the “flipped classroom” model. Students' understanding of the plays is greatly enhanced through this multi-modal approach. The Libraries have also begun more focused investing in the acquisition of digital content to be used explicitly in e-learning. An initiative underway with the School of Nursing brought useful feedback from one of the course designers about the value of digital media: “Digital video [provides] visual understanding and reinforcement of concepts...and the opportunity to review and reinforce clinical practicum procedures visually.” Media literacy, and facilitating

the integration of media into courses, is an area in which research libraries can play a lead role at their institutions.

The Purdue University Libraries are partners in a campus-wide effort called Instruction Matters: Purdue Academic Course Transformation, or IMPACT (<http://www.lib.purdue.edu/infolit/impact>). The program's purpose is to make foundational courses at Purdue more student-centered and participatory. Librarians are key members of interdepartmental teams that “work with Purdue instructors to redesign courses by applying evidence-based educational practices” and offer “learning solutions” that help students engage with and critically evaluate information.

In addition, the concept of information literacy is continuously being expanded to include specialized skills and topics such as data, media, and visual literacies, often described as 21st-century literacies. Add data management, knowledge management, and scholarly communication to the mix, and the range of topics and skills that must be conveyed and developed strains the best of liaisons and requires collaboration with colleagues with specialized expertise.

Finally, libraries want to develop new ways to embed learning support into the student workflow. At North Carolina State University (NCSU), the Libraries developed a course-based widget system called Library Course Tools (<http://www.lib.ncsu.edu/course/>) “to dynamically generate student-centric views of library resources and tools for all courses taught at NCSU” (<http://www.lib.ncsu.edu/dli/projects/courseviews>). At Minnesota, Library Course Pages are automatically generated for every course offered each semester (about 6,500) and pushed out to students through Moodle and the university's portal, providing them with a customized experience based on the courses in which they are enrolled. In these examples, liaisons must work closely with web developers; liaisons develop content and identify ways in which learning may be enhanced, and IT staff develop tech-based solutions.

## Support for Digital Scholarship

The libraries interviewed provide campus leadership through new forms of publishing and new ways of disseminating scholarship. All offer some form of digital institutional repository that encourages and facilitates open access to and digital preservation of the scholarship of faculty, staff, and students. Formats include articles, reports, theses and dissertations, as well as newer forms of publication including data, images, and video. Many institutions have a digital repository manager (functional role), but liaisons are still critical for content recruitment.

The Purdue University Libraries have become known for their focus on data management and the sharing and curation of data as a form of scholarly output. PURR, the Purdue University Research Repository, “provides an online, collaborative working space and data sharing platform to support the data management needs of Purdue researchers and their collaborators,” and liaisons and research scientists offer data consultation services (<http://purr.purdue.edu>).

More recently, libraries have participated in collaborative projects to produce completely new forms of scholarship including, but not limited to, many digital humanities projects. For example, NCSU Libraries produced a Biographical Dictionary of North Carolina Architects & Builders (<http://ncarchitects.lib.ncsu.edu/>), and the University of Minnesota contributed significantly to the Ojibwe People's Dictionary, a searchable, talking Ojibwe-English dictionary that features the voices of Ojibwe speakers. This is still relatively new territory for libraries and those working in this arena understand the need to be very selective with these resource-intensive projects. Criteria to consider when choosing projects include the following: alternatives for outsourcing, value that only the library can add, unique contributions to scholarship, political factors, proof

of concept for future applications, resources available for both development and ongoing maintenance, and key partnerships with mutual benefit.

As forms of digital scholarship evolve, so do librarian roles. Liaisons need to be able to provide a general level of knowledge about copyright, data management, the need for metadata and the ontologies available in their disciplines. They serve as a conduit between faculty who have ideas for new forms of scholarship, or an interest in publishing their own scholarly and creative works, the information technology staff who have the specialized knowledge to determine the feasibility of such potential projects and actually build them or manage the software and applications that support publishing efforts, and metadata experts whose work ensures broad discoverability and useful description.

A few libraries promote specific services to support digital scholarship. For example, NCSU offers a Copyright and Digital Scholarship Center (<http://www.lib.ncsu.edu/cdsc>), which highlights digital publishing projects. And Penn State provides publishing and curation services to help “researchers create new publications and distribute their papers, presentations, publications, datasets or other creations to a worldwide audience” (<http://www.libraries.psu.edu/psul/pubcur.html>).

## User Experience

Several libraries specified the need for user-experience librarians who serve as experts on their user communities, identifying and responding to student and faculty needs in both physical and virtual spaces. Traditionally, liaisons have been the first points of contact with students and faculty, applying their knowledge of the discipline, its pedagogical approaches, and its research methods to identify gaps between what users are trying to accomplish and what they can actually do, and finding ways to address the barriers that contribute to those gaps. Now, however, libraries are recognizing that a more systemic, campus-wide approach, often including the application of anthropological techniques, should be part of the fundamental infrastructure needed to develop new services. User-experience librarians must work in close collaboration with other liaisons, IT staff, and the administration to advocate for and prioritize user needs.

## Copyright, Intellectual Property, and Scholarly Communication

All of the libraries interviewed noted that there is enormous demand on campus for assistance with issues of copyright and intellectual property and agreed that libraries can provide institutional leadership in these areas. None of the new roles described here are mutually exclusive, and these three arenas are perhaps most representative of that overlap. Although liaisons are expected to have a general understanding of copyright law, fair use, authors’ rights, and the unique copyright considerations that media present, most of the libraries interviewed have librarians dedicated to copyright issues, sometimes with law degrees and an MLS, who provide a greater depth of expertise. They educate both their library colleagues and campus constituents and advise on specific issues around the use of texts, articles, media, etc., in teaching, as well as rights management for authors. This role is becoming increasingly important as liaisons become more involved in e-learning, and course content becomes available to communities beyond the institution, with the introduction of MOOCs as a prime example of these challenges.

## Trend 4: No liaison is an island.

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Libraries must support and reinforce new liaison roles with renovated and repurposed spaces, colleagues with specialized expertise, and a strong institutional capacity for technological support. As has been discussed, liaison success is, in many ways, dependent on the larger library infrastructure. Libraries are not only defining and hiring for new roles but also considering a range of ways to support those roles.

A key consideration mentioned by all interviewees was the development of new library spaces to support new services, which may be staffed by librarians—or other types of professionals—in new and emerging roles. Reflecting on the success of learning commons spaces, a number of libraries mentioned the desire to develop a “research commons” space for graduate students and scholars. There is uncertainty, however, around developing spaces that would primarily serve faculty, since they are no longer the primary users of physical library spaces. On the other hand, libraries are wondering if faculty need for support and community building in emerging areas is so great that they will use the new spaces. A number of libraries have gambled on this need, creating research commons spaces designed to meet perceived local needs. Research commons services include consultation and training, and the provision of tools and software. Additional areas covered include digital publishing, digital archiving and preservation, managing and storing data, multimedia production, GIS services, data mining, and more. Some of these spaces are staffed and managed in partnership with other campus units.

The University of Guelph Library has created the Data Resource Centre (DRC), a collaborative effort with the campus Computing and Communications Services (CCS). The DRC is the central repository on campus for numeric/statistical and geospatial data. The DRC also provides Geographic Information System (GIS) and data analysis support as well as web surveys support. According to their strategic plan, they also have a vision for the creation of a Research Commons and Digital Discovery Centre. The space is “envisioned as a place where faculty and graduate students can collaborate on innovative research projects, explore and create digital resources and tools, manage data, and consult experts. As a commons it creates a community and knowledge network of digital scholars fostering multi- and inter-disciplinary research.”<sup>5</sup>

NCSU has also been very focused on developing library spaces that offer new services. They offer new technologies, such as visualization capabilities and a game laboratory for computer science, design, and the humanities. In addition, as already described, they also see a need to support digital scholarship in their spaces. They believe faculty need help transitioning to new modes of scholarship, and the Libraries are collaborating with IT to help move faculty understanding of digital scholarship from one of consumption to one of production. While libraries are uncertain about whether faculty will actually use the new services offered in their spaces, they are also concerned about managing demand and expectations. NCSU Libraries mentioned that they must be selective about the collaborative projects they agree to undertake with faculty.

In addition to faculty, libraries are also very focused on the needs of graduate students, who may be more likely to use repurposed library spaces. Libraries see a need to provide spaces for collaboration and to catalyze interdisciplinary research.

## Trend 5: Collaboration is key.

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Collaboration and partnerships at every level, as well as clear roles and responsibilities, are critical to leveraging expertise and thereby developing and expanding new services, liaison roles, and library roles more generally. Librarians are increasingly inter-reliant with others on campus.

Everyone interviewed recognized the need for collaboration as new library roles and models emerge. As previously noted, the hybrid model of liaisons and functional specialists requires a team approach as well as a strong referral system. And, of course, the very use of the term “liaison,” which refers to a librarian’s connection with academic departments, suggests collaboration and partnership with faculty.

Many large and complex initiatives require collaboration between the library and other campus units. For example, one interviewee noted that a “library-centric approach to e-science is doomed to fail,” citing the need for the library, information technology, the university’s office of research, and other campus units to define their respective roles and work together toward mutual goals. The same could be said for implementing campus open access policies, creating open access funds, or adoption of an author’s addendum. Librarians have strong education and advocacy roles which, while critical to the overall success of these initiatives, will not be enough

without a strong faculty lead. One such example is Michael Eisen, a professor at the University of California, Berkeley, who believed so strongly in the power of freely disseminating his research that he co-founded the Public Library of Science (PLoS) in 2001, fundamentally changing the open access conversation among researchers.

Emerging e-learning initiatives are another arena in which true collaboration will be necessary. Partnerships where the library offers content and copyright expertise, campus IT supports the various components of learning technologies, and a center for teaching and learning offers faculty development, with all parties working in concert with faculty will make these efforts significantly more effective for the campus. At the University of Minnesota, the Libraries have taken the lead on a “digital course pack” pilot, working with the copyright permissions center, campus IT, and the campus bookstore. The goal is to produce a single, digital course pack for students, streamlining the process for faculty and making course materials more easily accessible and less expensive for students.

## Trend 6: Create and sustain a flexible workforce.

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Trend number two observes that a hybrid model for providing services and support is emerging. Unpacking this trend a bit reveals a variety of factors at play, and many libraries are employing a systems view of workforce development that considers these multiple elements. Although the focus of this paper has been on liaison roles, in discussing building a successful workforce for the future, the conversation cannot be limited to a single group of people. Blurring of librarian and support staff roles, a wave of retirements, difficulties in hiring and retaining technical staff, and a desire for libraries’ staff makeup to better reflect the diversity represented in their clientele are all challenges that libraries presently face. Many libraries noted that they have, at least in part, a legacy workforce, but the work they need to do is rapidly changing. All spoke of how employment rules and commitments (e.g., union contracts, tenure-like systems) can limit flexibility.

All libraries interviewed cited the oft-labeled “soft skills” as extremely important, noting that in many cases other knowledge can be acquired through training and experience. Emerging or new baseline workforce requirements will include, but are not limited to: capacity to cultivate trusted relationships with faculty and others, the ability to engage and thrive in the messy and ambiguous, aptitude for systems thinking, an ability to connect research and learning, and skills including political savvy, analytical and problem-solving skills, program development, conflict fluency, civility, and strong leadership.

The ARL Fall Forum in 2012 was entitled “Library Workforce for 21st-Century Research Libraries.” A panel presentation on staffing priorities for workforce transformation reported on a study conducted with academic library leaders and the ARL Scenario Thinking Project. New skills and competencies articulated through this process include entrepreneurialism, creativity, project management, leadership, fundraising, competitive intelligence, “marketing on steroids,” and risk taking. A need for new literacies such as geospatial literacy and data visualization was also discussed, as was a capacity for brokering deep collaboration with faculty and others. ARL directors cited the need for agility, noting that getting stuck in a traditional mindset will impede the organization.<sup>6</sup>

There are two important points to note here. First, the need for staff to develop and employ leadership skills refers not only to positional leadership but to the ability to lead from whatever position an individual holds, often called “leading from within.” Second, deep or radical collaboration needs to occur within libraries, with staff working across traditional silos such as department and divisional boundaries, across campus where we need to partner with faculty and other professionals, and across institutional boundaries, meeting a dramatic need for libraries to work together.

In 2011–2012, Tito Sierra conducted a study on research library hiring entitled “Staffing for the Future: ARL University Library Hiring in 2011,” in which he analyzed vacancy postings for professional positions in

ARL libraries for one year.<sup>7</sup> His study asked two questions: “How are research libraries staffing for the future?” and “What are the new and emerging jobs in the research library profession?” He assigned jobs to one of four categories, two of them related to leadership and management, the third for functional specialists, and the fourth for subject specialists. He then looked to see if the posted positions represented an existing role, a redefined role, or a new role. Among his key findings were that more than half of the advertised positions were newly created or significantly redefined jobs, and that two-thirds of functional specialist positions were for newly created or redefined roles. About half of the newly created functional specialist positions have a strong digital or technology focus.

He also found that research libraries continue to create plenty of new positions in “traditional” library areas such as special collections, administration, and public services. Less than 10% of subject specialist positions were newly created, however 30% were significantly redefined.

The libraries interviewed for this report confirmed that there is still a desire for deep subject expertise in some areas, but noted that they look for a combination of this expertise and the equally desired interpersonal, communication, and leadership skills.

The dynamic nature of shifting positions, combined with the workforce issues noted above, present significant challenge to libraries trying to chart a forward course. The libraries interviewed for this paper are using a variety of strategies to address these challenges, most of which are also reflected in the study done by Cawthorne, Lewis, and Wang. A combination of recruiting, retraining, and reskilling is underway at many libraries; the degree to which each strategy is enacted will depend on the circumstances of individual institutions. All libraries interviewed noted a scarcity of vacant or new positions that can be defined to address growing needs in new areas.

One strategy for addressing this challenge of redefining positions is to pilot non-permanent hires. The NCSU Libraries Fellows Program offers new librarians a two-year appointment during which they develop expertise in a functional area and contribute to an innovative initiative of strategic importance. NCSU Libraries typically have four to six fellows at a time, bringing in people with needed skills and working to find ongoing positions when they have a particularly good match. Purdue Libraries have experimented with offering two-year visiting assistant professor positions. And the University of Minnesota has hired a second CLIR fellow for a two-year digital humanities project; the first CLIR fellow now holds an ongoing position as a curator in Archives and Special Collections. The CLIR Fellowship is a postdoctoral program that hires recent PhD graduates (non-librarians), allowing them to explore alternative careers and allowing the libraries to benefit from their discipline-specific expertise.

All of these short-term hiring practices allow libraries to test new services, conduct forward-looking projects, and introduce new roles and new types of professionals—now—when the need is felt. The two-year window anticipates a natural turnover that may free up dollars for an ongoing position if warranted. In the recruitment arena, the libraries interviewed are already practicing many of the recommendations that came out of the Cawthorne, et al. study. To prepare for the future they recommend hiring for competencies (skills in technology, deep data, deep subject, culture/language, etc.) rather than credentials; hiring for potential (attitudes, aptitudes) rather than years of experience; and creating career opportunities with new titles and new responsibilities to attract non-MLS professionals. Their recommendation to compensate for responsibilities at levels that compete with the marketplace may be difficult in the present budget climate, but it should be considered. Their final observation is that many directors see a larger role for themselves in recruiting the right people, becoming “hands-on” for all professional hires.

A parallel strategy is to invest in strong and well-planned staff development. University of Guelph is investing heavily in professional development, providing consistent and formalized support to help liaisons develop a defined depth of expertise. The Cawthorne, et al. presentation is well worth review for their variety of recommendations on retraining and retooling, which include offering rich training and development opportunities

as broadly as possible while cultivating “stars” selectively and offering deep opportunities to those who are the most receptive. Libraries are very egalitarian institutions; when selective cultivation has been done in the past it has often been subtle. The authors can, however, imagine a forward approach that assumes all staff are capable of committing to a new and different future and desire to gain new skills and knowledge, thereby making these opportunities available to many.

## Conclusion

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The liaison role in research libraries is rapidly evolving. An engagement model in which library liaisons and functional specialists collaborate to understand and address the wide range of processes in instruction and scholarship is replacing the traditional tripartite model of collections, reference, and instruction. New roles in research services, digital humanities, teaching and learning, digital scholarship, user experience, and copyright and scholarly communication are being developed at research libraries across the country, requiring professional development and re-skilling of current staff, creative approaches to increase staff capacity, the development of new spaces and infrastructure, and collaborative partnerships within libraries, across campus units, and among research institutions.

Liaisons are playing two new roles, that of advocate and of consultant, both with an emphasis on campus engagement. As advocates, they have become a research library’s “sales force,” speaking on a wide range of topics and trends in higher education, influencing and persuading campus stakeholders on important issues, and serving as ambassadors of change.

As consultants, liaisons identify faculty needs and then make referrals to colleagues with more specialized, often technical, expertise. And although an advisory role is important, it can also surface tensions between liaisons and their specialist colleagues. Such handoffs may lack closure and a sense of accomplishment, and can be discomfiting for liaisons accustomed to providing answers. Ideally, a sustained team approach is best, in which liaisons not only bring critical parties together but also maintain engagement as problems are defined and solutions are developed.

In short, liaisons must be knowledgeable, confident, proactive, and politically savvy. They offer campus more than support; they are partners and leaders, helping faculty and students navigate a rapidly changing landscape.

## Endnotes

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- 1 Karla Hahn, “Introduction: Positioning Liaison Librarians for the 21st Century,” *Research Library Issues: A Bimonthly Report from ARL, CNI, and SPARC*, no. 265 (August 2009): 1–2, <http://publications.arl.org/rli265/>.
- 2 “21st-Century Collections: Calibration of Investment and Collaborative Action,” ARL Issue Brief, Association of Research Libraries, March 10, 2012, <http://www.arl.org/storage/documents/publications/issue-brief-21st-century-collections-2012.pdf>.
- 3 Ibid.
- 4 Mary Auckland, *Re-Skilling for Research: An Investigation into the Role and Skills of Subject and Liaison Librarians Required to Effectively Support the Evolving Information Needs of Researchers* (London: Research Libraries UK, January 2012), <http://www.rluk.ac.uk/files/RLUK%20Re-skilling.pdf>.
- 5 “University of Guelph Library Integrated Plan in Year 5: Strategic Update for 2010/11,” University of Guelph, accessed July 8, 2013, [http://www.lib.uoguelph.ca/about/components/documents/library\\_integrated\\_plan\\_2010\\_2011.pdf](http://www.lib.uoguelph.ca/about/components/documents/library_integrated_plan_2010_2011.pdf).

- 6 Jon E. Cawthorne, Vivian Lewis, and Xuemao Wang, “Transforming the Research Library Workforce: A Scenarios Approach” (presentation, ARL Fall Forum, Washington, DC, October 2012), <http://www.arl.org/storage/documents/publications/ff12-cawthorne-lewis-wang.pdf>.
- 7 Tito Sierra, “Staffing for the Future: ARL University Library Hiring in 2011” (presentation, ARL Fall Forum, Washington, DC, October 2012), <http://www.arl.org/storage/documents/publications/ff12-sierra.pdf>.

## Appendix: Video Interview with Jonathan Koffel

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Video can be found online at <http://youtu.be/Y0cxdS-EYpU>.

