

Cindy Shirkey, Jeanne Hoover, and Katy Webb

# Doing the work

## Crafting and implementing liaison competencies

**R**ecently at Joyner Library, the main library for West Campus at East Carolina University (ECU), three heads of service completed a project to revise the library's liaison competencies. The head of collection development, the head of research and instructional services, and the scholarly communication librarian took the competencies from a task-oriented document and turned them into one that allows liaisons to choose what and how they want to learn. The new document is built around learning statements, is goal-oriented, and serves liaison librarians much better than the previous document. This article will cover the creation and use of the new liaison competencies document.<sup>1</sup>

ECU in Greenville, North Carolina, is part of the University of North Carolina System and employs just over 2,000 faculty. ECU has an FTE of approximately 27,000 comprising undergraduate, graduate, medical, and dental students, and, in 2017-2018, conferred more than 7,000 degrees.<sup>2</sup> It is a doctoral university with high research activity, according to the Carnegie rankings.<sup>3</sup>

### First iteration

Research and instructional services and collection development got together several years ago to create a checklist document. Easier tasks were designated Level 1, while more difficult ones were rated Level 2. The reason it was a checklist was that liaisons could run through the list and check off tasks, completing the appropriate level.

Much of the first iteration of the liaison competencies was an expression of feeling through

what were reasonable expectations for liaisons. As a result, this first list was too short-sighted and task-oriented. It was concerned with levels of accomplishment. Full-time collection development librarians could expect to master Level 2 tasks, while all others need only apply themselves to the Level 1 activities. There was no room for personal expression or intellectual curiosity in how the competencies were written. Although it was made with liaison input, no one asked the liaisons if they wanted competencies. That decision was made at a higher level. This first iteration was overly concerned with making tasks achievable at both levels.

### Need for competencies

A few years later, the department heads wanted librarians to engage with their liaison duties in more meaningful ways and to build upon their existing knowledge in order to grow. Although the library had a liaison competency document, it was in need of an overhaul. Early in 2018, we met with the associate director for collections and scholarly communication to

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discuss the need for new competencies and to form a working group.

The working group conducted a review of the literature and also looked at competencies from schools in the library's state system, as well as some stand-out schools, like Cornell. The most impressive document came from the University of North Carolina-Greensboro (UNCG). They used learning outcome language, and they split their lists up between learning objectives and best practices.<sup>4</sup> In the past, librarians at ECU used this document to craft personal goals for their collection development duties. The working group wanted to give examples to be clear about the work that was to be done.

Although the competencies were newly created, they were not created in a vacuum. The Association of Research Libraries' "SPEC Kit 349: Evolution of Library Liaisons" outlines the many roles and responsibilities of liaisons, as well as describes case studies in academic libraries and reviews position descriptions.<sup>5</sup> The research and instructional services department had reviewed and discussed a number of ACRL documents in the prior goal cycle, including the Framework for Information Literacy for Higher Education, Roles and Strengths of Teaching Librarians, and Guidelines for Instruction Programs in Academic Libraries.<sup>6-8</sup> When the department reviewed these guiding documents, they talked about ways they could improve as instructors and as a program. The research and instructional services team conducted an internal survey based on the documents to gather impressions. Discussions followed, and goals were made for the following year. The entire process was meant to benchmark the program and compare to the ACRL documents with an eye to the future.

In all of the departments, a need had been expressed for formal competencies that could be used in goal-setting and training. This was especially apparent when new people were hired and during periods of personal and departmental goal-setting. Creating a living document with competencies was seen as a meaningful way to incorporate a myriad of training documents and those that had been created on a national scale. Put another way, these local

competencies codified what the librarians had been doing, but also set expectations for what should and could be done in the future based on stretch goals developed from other institutions and frameworks.

## Second iteration

After the initial review, the group met to draft new liaison competencies guidelines. A shift was made from UNCG's Best Practices to the terminology Example Goals, because the document was meant to be used for training, goal setting, and the like. The format of the Example Goals uses similar language to the required SMART goals for personal and departmental objectives. SMART goals mean that the goals are specific, measurable, attainable, relevant, and time-bound.<sup>9</sup>

The majority of liaisons at ECU have other duties, like instruction, as the main portions of their job. Previously, only scholarly communication and collection development had been represented in liaison competencies, which missed key pieces of work, like reference and instruction. The head of research and instructional services also came up with the teaching and learning competencies for this newest iteration of competencies. This was seen as a way to include all aspects of the duties for the majority of liaisons, since many have both teaching and collection development responsibilities.

Once a draft of the document was completed, the working group sent it around to the research and instructional services, collection development, and scholarly communication teams for review. The new set of competencies was well-received by the departments. The new competencies allowed them to have more flexibility, which helped with the reception of the new competencies.

One area where some discussion occurred was on the topic of copyright. Some liaisons have reservations about the depth of knowledge needed around copyright since the library has an in-house copyright officer. The final copyright competency under scholarly communication includes wording to direct questions to the copyright officer, as appropriate. As noted earlier, the aim was to make the

competencies flexible, based on the liaison's position and interests. The suggestion to refer questions to functional liaisons (such as the copyright officer) if the liaison was unable to answer, helped the adoption of the competencies be more successful.

The working group also built buy-in and received feedback by having a combined meeting with all three of the teams. Simultaneous meetings of all of the librarians and staff from these departments is rare, and feedback was positive. In addition, this meeting was attended by administrators who were interested in the outcome of this project. During the exchange, they took a backseat to allow feedback to be shared among the frontline librarians.

With the new competencies, the heads of the departments that oversee liaison activities in the library are allowing liaisons to learn in ways that are best suited to them as individuals. The competencies are still a blueprint of what needs to be known, but librarians can pick and choose among the goals—or even come up with their own goals—in order to meet the expectations of being a liaison.

The top of the new document outlines what the competency entails, then lays out some example goals. These example goals start at the most basic level and then get a bit more advanced. Other topics that were included in the document covered teaching, assessment, providing outreach, as well as creating and maintaining LibGuides, tutorial videos, and other learning objects. Every effort was made to try to encompass the entire range of work that a librarian might come in contact with in the areas of reference, instruction, collection development, and scholarly communication. Because this was something that the library had been building toward and the older competencies were widely accepted, the new, more fleshed-out competencies were widely considered to be a helpful change.

### **Current and future uses**

The competencies were developed to help build on the expertise of current liaisons and provide a guide for new ones. In 2019, liaisons were asked to review the competencies and

incorporate them into their goals for the upcoming academic year. Since the format of the competencies incorporates the SMART goal format, liaisons were easily able to add competencies to their annual goals. Additionally, the document helped liaisons identify goals they may not have pursued otherwise.

In addition to building goals, the new competencies are being used to inform the scholarly communication boot camp series led by the scholarly communication librarian and head of collection development. The scholarly communication boot camp was established to increase knowledge and create discussions around scholarly communication-related topics, such as open access, open educational resources, copyright, and data management. Previously, the learning outcomes for the boot camp sessions were not well-defined. The competencies are now being used to inform the boot camp sessions and to help identify key learning outcomes. Additionally, they provide an avenue to identify gaps that can be addressed during future boot camp sessions.

The newly established competencies have been used to hire and train new librarians, in particular, liaisons. Having unified language about liaison duties means that the competencies can be used in job descriptions for hiring committees. The document also provides concrete ways that new librarians can learn more about their liaison duties and the university. The competencies not only help new liaison librarians, but also their managers. Training takes time and the competencies provide an outline of topics that should be addressed with new librarians. Previously, the library lacked a consistent plan for training new librarians involved with liaison, instruction, or scholarly communication work.

### **Conclusion**

Liaison librarianship is an area that continues to evolve as new services are developed or expanded to meet the needs of faculty, staff, and students. To help address this changing area, a comprehensive list of topics was developed that was geared towards

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## Reflections

As is the case for almost everyone on the team, this collaborative project was not formally part of my job description. I took on this task as a member of a college committee. It was essential that we all worked together to keep pushing the project forward when our attention was often drawn back to our primary jobs. When I joined the team, I disrupted the process they had begun to develop, which initially made for more work, but built a foundation we can now easily add to. By adding a layer of controlled vocabulary, which we defined in the project's manual, and refining it with data and form validation, we can add a new resource to the map quickly and review its place in L4L's networks. Over time our library's website has become an ad hoc place for sharing and distributing information beyond the typical scope of the library. By hosting the map, I am not only making our update process smoother,

I am sharing it from a place that the campus community trusts.

I am not a cataloger and do not create metadata daily in my job, but I understood enough about these processes to bring these skills to the project. In return, through working on this project, I learned more about the students and communities the college serves and how initiatives like the Lab and L4L support students. While the map has yet to fully be realized as an ongoing L4L service, the process of creating it taught us how to assess partnerships and resources, while reinforcing continued collaboration between the library and L4L.

## Note

1. Elizabeth Lightfoot, Jennifer Simmelink McCleary, and Terry Lum, "Asset Mapping as a Research Tool for Community-Based Participatory Research in Social Work," *Social Work Research* 38, no. 1 (2014): 59–64, <https://doi.org/10.1093/swr/svu001>. *zz*

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*("Doing the work," continued from page 540)*

liaison work. Liaisons can use these competencies to identify areas to expand their skills. Further, competencies can be customized to fit the needs of different institutions, as well as be applied to any liaison model. The competencies have been used to develop goals and to train new liaison librarians.

## Notes

1. The old and new documents can be found at this institutional repository link: <https://thescholarship.ecu.edu/handle/10342/8550>.

2. East Carolina University, "Institutional Planning, Assessment and Research," <https://www.ecu.edu/cs-acad/ipar/> (accessed January 17, 2020).

3. Carnegie Classification of Institutions of Higher Education, "Institution Lookup," <http://carnegieclassifications.iu.edu/lookup/lookup.php> (accessed August 3, 2019).

4. University of North Carolina-Greensboro University Libraries, "Liaison Roles and Responsibilities," <https://library.uncg.edu>

[/info/library\\_liaison\\_responsibilities.aspx](/info/library_liaison_responsibilities.aspx) (accessed August 3, 2019).

5. Rebecca K. Miller and Lauren Pressley, SPEC Kit 349: Evolution of Library Liaisons (Chicago: Association of Research Libraries, 2015).

6. ACRL, "Framework for Information Literacy for Higher Education," <http://www.ala.org/acrl/standards/ilframework> (accessed August 3, 2019).

7. ACRL, "Roles and Strengths of Teaching Librarians," <http://www.ala.org/acrl/standards/teachinglibrarians> (accessed August 3, 2019).

8. ACRL, "Guidelines for Instruction Programs in Academic Libraries," <http://www.ala.org/acrl/standards/guidelinesinstruction> (accessed August 3, 2019).

9. Chartered Management Institute, "Setting SMART Objectives Checklist 231," Management House, [https://www.managers.org.uk/~media/Files/Checklists/CHK-231-Setting\\_Smart\\_Objectives.pdf](https://www.managers.org.uk/~media/Files/Checklists/CHK-231-Setting_Smart_Objectives.pdf) (accessed August 4, 2019). *zz*