



# EXTREME MAKEOVER: A BLUEPRINT FOR REDEFINING THE ROLE OF THE LIAISON LIBRARIAN IN THE ACADEMIC LIBRARY

Cinthy Ippoliti, Oklahoma State University  
February 2017

# Outline and Goals

- Analyze the challenges and opportunities involved in shifting liaison librarians to new models of engagement with their departments
- Discuss tips to (hopefully) effectuate this type of transition smoothly both in terms of areas of focus as well as process
- Activity and Debrief



# Institutional context

- Liaisons had traditional reference, instruction, and collection development duties
- Library re-organization in 2012
- Hired in Fall of 2014 with the following goals:
  - Develop a new Academic Liaison Program that defines the notion of what it means to be “engaged” as a liaisons
  - Create a systematic way to positively engage faculty, staff, and students outside of the classroom and provide targeted programming, services and support that will focus on all aspects of how our collective community perceives and interacts with the library
  - Implement internal processes for evaluation, innovation, professional development and scholarship that enable a flexible, cutting-edge approach to daily work and longer-term planning

**In other words...we had  
to change everything!**

# What does this really mean?



- Re-defining a program for both first year and subject specific instruction and integrating it within the general education program of the institution
- Re-designing research support services to include less time spent on the desk and greater utilization of tools such as online appointment scheduling and chat
- Developing strong internal and external partnerships in order to facilitate outreach efforts

- Shifting collection development duties from buying resources to reach a specific dollar amount to analyzing statistics and communicating with departments
- Providing systematic and ongoing internal training in areas such as data management, open access, tools such as Altmetric, and the new Framework for Information Literacy
- Updating existing primary assignments to provide a way to determine our impact on university-wide strategic goals



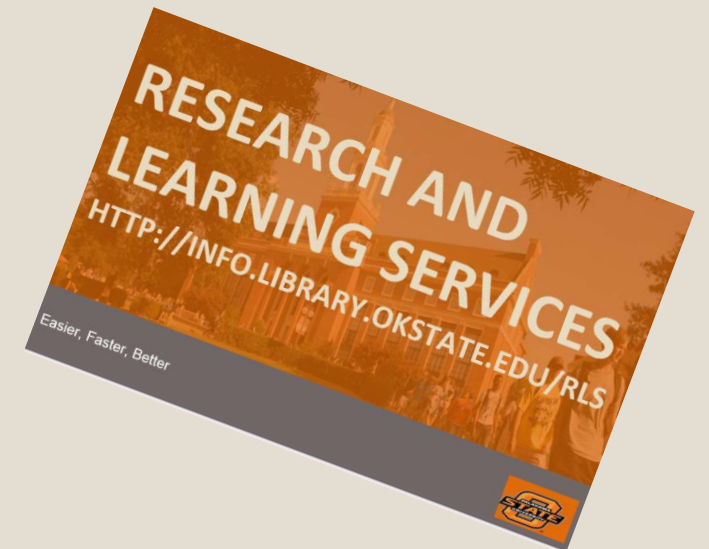
# Internal change management

- Individual interviews where I identified major patterns that were emerging
- Two-day, mediated retreat
- Inclusive strategic planning-development and ongoing review
- Formal and informal recognition
  - Stash of thank you notes and cards
  - End-of semester celebrations



# External change management

- We had to manage change externally as well!
  - RLS Roadshow
    - One page ppt that we personally presented at departmental meetings in the Fall
  - Targeted meetings with everyone who was willing to talk with us
    - New faculty
    - Research data services
- Updated materials for liaisons
  - “My librarian” personalized videos
  - Coming soon: Librarian profiles in the IR, ORCIDiS



# How did we support it?

- Updated online presence and business cards: <http://info.library.okstate.edu/steve-locy>
- New primary assignments that emphasize scholarly communications, collaboration, and in-depth assistance rather than hours logged (Happy to share this if there is interest)
- Internal professional development program
  - Face to face workshops and outreach materials
    - Faculty folders with customizable inserts
    - Email templates for targeted messaging
  - Online tools: <http://info.library.okstate.edu/training/RLS>
- Formal emphasis on determining the impact of these new activities
  - Both quantitative and qualitative (interactive infographic based on Excel spreadsheet: <http://info.library.okstate.edu/c.php?g=398205>)
  - Both from the perspective of the liaison as well as the user (in progress)
  - Systematic approach to developing data dashboard for collection and dissemination (future)



# Infographic and Spreadsheet

AREA OF IMPACT	NUMBER(S)	QUALITATIVE DATA AND NOTES
<b>Outreach and Communication</b>		
Purpose, content and outcome of each; Feedback from faculty.		
Number of departmental visits/semester (in column C note the type, i.e. informational, workshops, demos/undergraduate, graduate, data management, curation, storage, research impact, OER, author rights/copyright, technology, collection) and instruction)		
Number of individual visits/semester (in column C please indicate if the faculty/staff member is new, department/college, unit)/(undergraduate, graduate, data management, research impact, OER, author rights/copyright, technology, collection/instruction)		
Number of departmental events attended (speakers, mixers, etc.)		
Number of research or instructional partnerships (in column C note type, i.e. co-teaching courses, curriculum development, integrating any of the areas mentioned above)		
Number of appointed departmental committees or other groups (in column C note type)		
Number of specialized projects (in column C note type, i.e. undergraduate, graduate, instruction, data management, author rights/copyright, technology, OER, research impact, discipline-specific)		
<b>Instruction</b>		
Topic/Content; Learning Outcomes Assessed; Method (survey, rubric, student feedback from students/faculty		
Number of formal instruction sessions (in column C note type, i.e. one-shot or multiple sessions for a specific course)		
Number of other general workshops or demos held (not for specific departments i.e. Endnote, OER, data management, etc. In column C note type.)		
Library credit courses taught		
<b>Research Services</b>		
Consultation purpose, who, and outcome; Content of materials; Feedback from students/faculty		
Number of consultation requests received (email, visit, or phone call received directly from a student or faculty member to schedule an appointment OR one you made as a result of an in-depth research question received)		
Number of hits for all guides or tutorials developed		
Number of research questions answered virtually (chat/email), phone, in-person		
<b>Collection Development</b>		
Statistical information analyzed; Library resources marketed; Collection discussed from students/faculty		
Statistical information analyzed-database hits, usage stats, etc.		

From this...



To this...



# Change management models

George Kotter

- Create urgency
- Form a coalition
- Create a vision for change and communicate it
- Remove obstacles and create short-term (smaller) wins
- Build on the change

**\*Design Thinking**

Chip and Dan Heath (Switch: How to Change Things When Change Is Hard)

- Follow the bright spots
- Script the critical moves but leave the rest alone
- Point to the destination
- Find the feeling
- Shrink the change
- Grow your people
- Tweak the environment
- Build habits
- Rally the group

# Activity

- Quick polls:
  - What is the most pressing issue in terms of new liaison roles at your institution?
  - What is the surrounding context for this issue? Please use chat to explain
  - We will vote on what issue to analyze further for the remainder of the discussion

Guided brainstorming and discussion:

1. Identify who is ahead and behind the change in our scenario
2. Direct the people ahead of the change
3. Motivate those who lag
4. Shape the path



# Direct those at the forefront

- Point to the destination
  - What's the end goal?
  - Why is it important?
- Follow the bright spots
  - What's working in your current model?
  - What isn't working as well?
- Script the critical moves
  - What **behaviors** do you wish to change?



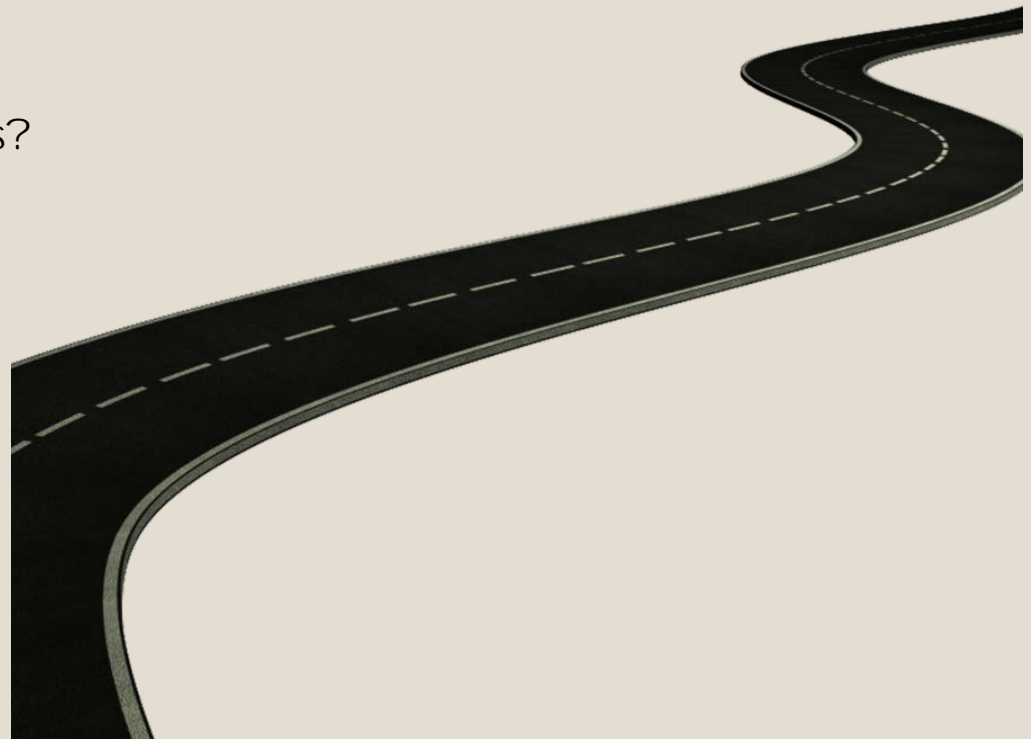
# Motivate those who are lagging

- Find the feeling
  - What emotions do these changes highlight? How can you shift negative ones into positive ones?
- Grow the people
  - How can you (or the organization) support the people in this situation?
  - How can you instill a “growth” mindset (it’s ok to fail)
- Shrink the change
  - What are the smaller steps towards this change?



# Shape the Path

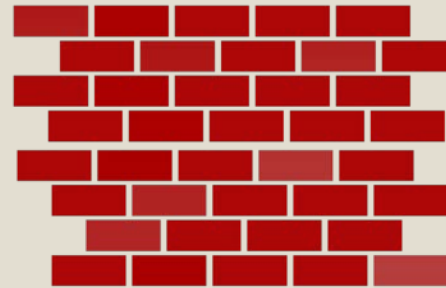
- How can you energize your colleagues?
- Build and encourage “good” habits
  - How can you set ***action triggers*** for these habits?
- How can you change the current situation?
  - If you can't, is there someone who can?



# Dealing with obstacles

## *No need/motivation to change*

- Create a sense of urgency
- Shift to a new identity/environment
- Focus on how to get there as opposed to whether anything needs to change



## *It will never work*

- Find an example of when it can
- Engineer smaller successes along the way

## *We've never done it that way before*

- Is there a part of the culture that supports the "new" way?

## *It's just too much*

- Start small and smooth the path
- Develop a growth mindset (it's ok to fail)

# Let's re-visit our scenario

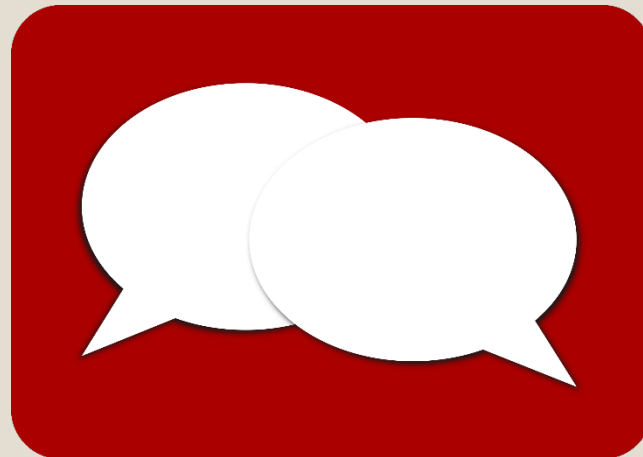
Given this list, what do you think the obstacles might be and how could you overcome them?

- Please use chat to share your thoughts



# Debrief

- How has your perception of the issue shifted?
- What new ideas do you have as a result of this discussion?
- How can you implement this model at your institution?





# Thank you!

Cinthy Ippoliti: [cinthya.ippoliti@okstate.edu](mailto:cinthya.ippoliti@okstate.edu)

RLS site: <http://info.library.okstate.edu/RLS>

