Getting on the Change Train:
Facilitating a Reframing of the Liaison Model

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Introduction

For a long time, the identity of a liaison librarian has revolved around what is often cheekily referred to as the "holy trinity" of instruction, reference, and collection development (Whatley, 2009, p. 30). However, as even those traditional areas evolve with new digital tools and pedagogy, the identity of what it means to be a liaison librarian has undergone a transformation and, some might even say, a crisis. It has been well-recorded in the literature, and reinforced through practice, that the role of the liaison librarian has expanded over the years to include "functional" activities such as scholarly communication, copyright, research data management, digital humanities, digital publishing, entrepreneurship, collections analysis, bibliometrics, and more. This change, which is referred to as a "hybrid model"—one that combines the traditional subject-focused liaison model with emerging functional specialist responsibilities—also arguably marks a shift away from the traditional work that librarians perform to a new focus on what library users are doing in their teaching, learning, and, most-prominently, research activities (Jaguszewski & Williams, 2013; Kenney, 2014).

This has certainly been the experience of the liaison librarian renewal project at UNB Libraries, which has been a multi-year, ongoing process of reflecting on the

diversity of librarian work performed at UNB Libraries and reinventing the liaison role for the twenty-first century. The project focused on how expectations and responsibilities are evolving, the vision of what a liaison librarian looks like heading into the future, and how to develop the skills and mindsets to move forward. The authors, as facilitators of the process at UNB, hope to share our experience via this case study, as we believe that much of what we have encountered will resonate with others who are engaging in this work.

Beyond the changing nature of librarian work and responsibilities in the twenty-first century, there is also an increasing recognition of the need for, and importance of, academic libraries engaging with their user communities, which can extend beyond discipline affiliation. For example, international students, whose majors cover a range of disciplines, are a rapidly increasing population on North American university campuses. Libraries need to be responsive to changes in student body demographics and develop resources and programs accordingly. In Canada, how to support indigenous student success is a focus of many academic libraries, particularly in light of the 2015 release of the federal *Truth and Reconciliation Commission Final Report* and its 94 Calls to Action to address and repair the harm done by the legacy of the residential school system (Truth and Reconciliation Commission of Canada, 2015a, 2015b). Diverse user communities such as these cut across all disciplines, just like functional activities, and working with them effectively requires specialized skills and know-how, as well.

As liaison librarians turn from their traditional domains (which are still very valued and core to the mission of UNB Libraries) to new, emerging areas, there is a need for closer collaboration outside discipline-defined boundaries. Increasingly, it is important not to only liaise with designated faculties and departments but with each other, particularly with colleagues who have specialized expertise in data, scholarly communications, copyright and archives, and special collections. It has been said that, in this hybrid model, liaison librarians need to adapt to become a bit more like functional specialists and widen their scope with baseline knowledge of emerging areas. Likewise, functional specialists need to become a bit more like liaison librarians and increase their networks, engagement efforts, and strategies (Malenfant, 2010).

This chapter provides background on work undertaken to move the liaison model forward within our mid-size Canadian academic research library and, from a facilitators' perspective, our reflections on some of the progress made and challenges faced during the process. It is clear that although renewal efforts at UNB started in earnest back in 2016, the goal of moving the model forward is a change that does not happen overnight or even over the span of a year. As we have heard often and endorse wholeheartedly: change is an iterative process. Even now, when asked, the feedback is mixed among librarians; some think that we are already there and that this blended model is just the new norm. (So why do we keep talking about it?!)

Others think that we are still very far from adopting and implementing, due to organizational structure impediments, etc. In actuality, there is truth to both positions.

Background

In summer 2016, the dean of libraries at UNB appointed a task force of five liaison librarians on the Fredericton campus to examine and make recommendations on the liaison model as it related to a changing academic landscape. The ensuing process involved an extensive literature review of liaison restructuring initiatives and extensive consultation of library and broader campus stakeholders. The task force also examined the strategic and academic plans of both UNB Libraries and the university writ large to ensure that its work would be closely aligned with these plans.

The task force's literature review certainly confirmed suspicions that we were not alone in wanting to respond strategically to the realities of contemporary academic librarianship, including technological disruptions, new disciplinary (and interdisciplinary) configurations, shifting campus demographics, and, of course, increased workloads for a reduced librarian complement.

UNB Libraries implemented its library liaison model in the early 1990s, giving individual librarians broad responsibilities for supporting the library-related needs of (typically) several academic departments and/or faculties. Students and faculty could thus expect to work with one particular librarian to satisfy discipline-based informational demands. This meant that liaisons became the point persons and default experts on library activities as they related to the needs of the particular "beats" they walk and inhabit. Our constituents today, however, increasingly belong to multiple communities that often cross disciplinary divides. Given this reality, how should we engage with some of the more readily defined of these communities—first-year students, for example, or first-generation university students, or those of First Nations origin, or our growing international complement? The legacy model was ill-equipped to respond to the needs of these communities.

An Evolving Understanding of Engagement

The need to better engage our students and faculty no doubt inspired the original liaison model. It would, in turn, inspire its retooling. Beyond shifting senses of community, academic libraries are contending with several factors that affect how we engage with users:

- **Emerging trends in scholarly communication:** Internet Communication Technologies (ICT) continue to reshape how researchers collaborate, manage data, and disseminate findings. Local technologies such as institutional repositories, data representation/manipulation/storage solutions, and digitization

initiatives often fall to library systems to support and shape with their constituents in mind.

- **Open access:** As part of ongoing efforts to offset the effects of escalating subscription/licensing costs and shrinking budgets, libraries play important roles as champions and enablers of open solutions to disseminating scholarly content. New policy imperatives for publicly funded research are an added incentive for stepping up activities in this area.
- **Proliferation of online/distance learning programs and courses:** As universities expand into new markets with technologies designed to recreate the university experience in a virtual context, libraries must support both new modes of pedagogies and new kinds of students (and, increasingly, instructors), a considerable number of whom operate in vastly different cultural milieus and with varying degrees of physical and technological accessibility.
- **Institutional perspective on students as "customers":** University administrations' interest in adopting customer- and market-driven perspectives is hardly surprising. If we consider financial pressures (the proverbial "doing of more with less"), shifting student demographics (increased internationalization, accessibility measures, support for First Nations and other groups, etc.), concerns about retention (represented, for example, by a focus on the "first-year experience"), and emerging interdisciplinary programs of teaching and research, etc., the implications are considerable. While we may not always agree on how this rhetoric translates into the management of academic programs, we can perhaps agree that such a time of flux is ripe for experimentation. We cannot pass on the challenge of understanding our clients in new ways.
- **Demonstrating return on investment:** With institutional pressures to develop outcomes-based teaching practices, we are called upon to explore new pedagogical approaches and related means of assessing our impact (Bragdon, Croos, Fisher, Wells, & Taber, 2016).

One response to these challenges has been to restructure liaison programs in order to focus on new responsibilities (scholarly communication or embedding in curricula, for example) and de-emphasize or off-load others (collections development, perhaps, and/or reference desk roles) (Jaguszewski & Williams, 2013). Another involves regrouping around a *model of engagement* that is user-focused and emphasizes integrating into the academic life of the scholars and students (Kenney, 2014).

Such a model requires that librarians step into relevant conversations about teaching and research where they take place, both on campus and in extended communities. From there we might reshape services according to their contemporary utility.

The community consultation phase certainly suggested as much. With the participation of students, faculty, and members of select support units with whom we share a commitment to supporting research, teaching, and learning, the task force

endeavored to identify opportunities for inter-unit collaboration. Resultant conversations spoke primarily to the lack of information sharing and coordination of effort across units. It was clear to both the task force and consultees that we needed to be having conversations like these on a dedicated basis.

The task force's recommendations included:

Develop a shared vision of engagement.

A renewed and actionable vision of engagement with emphasis on

- increasing services to graduate students;
- first-year student engagement;
- space optimization according to user/customer/client needs;
- supporting scholarly communication with a view to collecting and showcasing UNB research and supporting open access solutions;
- piloting research services to support entrepreneurship and innovation; and
- improving communication with constituents.

Retain the essential discipline-based structure of the liaison model, renewed through the co-development of a "position description framework."

Recognizing that the framework under review was in many ways still meeting user expectations, the task force recommended a degree of caution over making radical changes, stressing the value of some continuity in service. Collections work for example is still recognized by our liaison group as vital to the productive relationships we enjoy with faculty and students. Any modifications to this arrangement would need to be informed by a process of determining how emerging functional responsibilities fit within a renewed engagement model.

A "position description framework" identifies a number of function-based areas of expertise that cross disciplinary boundaries and operationalize contemporary forms of engagement (see appendix A). For the task force, these included:

- scholarly communication
- teaching and learning
- engagement
- data management
- collections

For each of these areas, a "position description framework" document serves to

- prioritize liaison activities;
- identify best practices; and
- outline necessary and desired expertise to manage each functional activity, thus highlighting training needs and identifying where expertise lay outside the liaison group.

The frameworks would be written by smaller groups of self- or otherwise identified champions in a particular area and would be revised regularly based on iterative efforts at operationalization.

Adopt a teaming model for addressing specific constituents' or functional needs that cross disciplinary lines.

The task force recommended expanding the practice of creating small ad hoc teams to act as needed on opportunities related to functional areas.

Library Planning and the Importance of Supporting University Objectives

To promote a shared understanding of what our users are doing and need, it is increasingly important to look outside the library for direction and guidance in setting organizational goals and objectives. Academic library strategic planning should be influenced by what is happening at a higher institutional level. However, this requires involvement in broader campus planning initiatives and a "seat at the table" on key committees and working groups. At UNB, the Academic Senate and representation on Senate committees are other avenues for library inclusion. For the authors, two main themes have emerged as efforts are made to widen our networks and scope and to implement the recommendations: (1) communicating and collaborating with campus stakeholders whose priorities and audiences overlap with ours must become second nature, and (2) one size does not fit all, as each unique library culture dictates that change needs to occur organically.

Rita Vine (2018) has talked about the challenge of moving outside the walls of the library to inform liaisons of priorities for not just the departments and faculties that they serve but also for campus units such as student and research services (p. 420). Other important initiatives such as equity, diversity, and inclusiveness (EDI) and campus sustainability, offer opportunities to take direction from university-established priorities and implement recommendations within the library. EDI is an issue that particularly affects academic libraries, due to the relative lack of representation of visible minorities within the profession.

At UNB, the multi-phase process of academic planning has provided a written record of goals and aspirations for departments and faculties within the institution, including the library system. As the university planning cycle shifts from academic planning to strategic planning, along with a conversation over which should occur first (a bit like the chicken and the egg), there is a need for the library to engage in the process and share its unique perspective as a unit that serves all disciplines and all students. Because the strategic planning process is more macro and higher level

than the academic planning exercise, it creates a broader platform for the library. For example, as part of the Liaison Librarian Task Force report, *Renewed, Focused Engagement with Our Constituents*, a table was created that outlined UNB's strategic planning goals at the time and how our own plans aligned with them (Bragdon et al., 2016). The university's goals were expansive (i.e., "Build a better province"), so there was lots of room to brainstorm on how they apply to the library system ("comprehensive in the collection of published material from New Brunswick, etc.") (Bragdon et al., 2016, p. 31).

Strategic alliances are another way to increase awareness and knowledge of what users' needs are, particularly for groups that the library wants to target for outreach. For example, UNB Libraries has been working with the School of Graduate Studies (SGS) to offer certificate designation for a workshop series called Graduate Essentials for Academic Research (GEAR). This program was born out of the recognition that graduate students often arrived to pursue degrees without a solid research foundation. The series, which is organized and taught by the library, provides an avenue to learn more about the needs of graduate students and the priorities of the SGS unit. In addition, it provides a venue for liaison librarians and functional specialists to come together to co-teach, which supports the vision and goals of the liaison librarian evolution. The alliance is seen as a win-win opportunity, as SGS has recognized that its students need these skills to be successful, and graduate students are a target demographic that UNB Libraries wants to attract and better serve.

What We Have Learned, So Far: Progress Made and Remaining Challenges

Signs of Moving Forward

UNB Truth and Reconciliation Commission (TRC) Working Group

In response to the Truth and Reconciliation Commission Calls to Action, the University of New Brunswick struck a working group with broad campus representation to make recommendations on approaches to incorporate indigenous knowledge into curricula and to better serve indigenous campus populations. UNB Libraries is represented on the working group by one of this chapter's authors (Marc Bragdon) who, as liaison with the Faculty of Education, has developed a close working relationship with its Mi'kmaq-Wolastoqey Centre (MWC).

MWC provides support to First Nations students and guidance more generally to the university for integrating indigenous cultural and epistemological traditions with

western curricula. Their *Bridging Year Programme* enables First Nations students, mostly from the Wolastoq and Mi'kmaq nations of New Brunswick, to upgrade high school credits necessary for admission to university programs and to take entry-level university courses, hosted in learning environments sensitive to their needs.

For the past five years, Bragdon has been collaborating with the Bridging Year English instructor on media literacy modules that deconstruct popular and academic discourse on current events involving the First Nations of Canada, ranging from the Idle No More movement to consultation on resource extraction projects. Learning diagnostic techniques for critically appraising information sources, students are encouraged to probe the motives and mechanisms of various publications and writers for a research paper that also advances their own views.

Since this work began, it has been Bragdon's goal to incorporate media creation into media literacy instruction so that students could express their views in media-rich ways. It was not immediately obvious how this should happen; however, both alone and in collaboration with the Centre for Enhanced Teaching and Learning (CETL), he began developing his own media modules and related workflows as a means of personally building his own critical, creative, and technical capacities.

More recently, collaborating with an instructor in the Faculty of Education whose background is in participatory cinema and social justice, the author developed a workshop where students would plan and shoot their own films using cellphones ("cellphilming"). Students would fan out into the main library in small teams to shoot films on the cultural imprints of student spaces and to comment on how these spaces could be made more welcoming to indigenous students. What the students delivered in the end were rough but compelling portraits of the library from a perspective we had rarely, if ever, heard from. Their filmic impressions showed a strong awareness of their own cultural heritage, and subsequently, the author shared these with library leadership. The resulting conversations have informed strategic decisions on student space redesign as well as the library's plans to act on matters raised in the TRC Working Group.

The UNB TRC Working Group is co-chaired by MWC director and the new assistant vice president indigenous affairs (also known as the *Piluwitahasuwin* or "The one who promotes change in a good way toward truth" in the Wolastoqey language) with a joint appointment to MWC and the Office of the Vice President Academic. Among its recommendations, the TRC Working Group's 10 Point Action Plan (University of New Brunswick TRC Working Group, 2018) identified the need for UNB to provide culturally aware and supportive spaces on campus and to foster opportunities for MWC to be visible outside the Faculty of Education.

In spirit and deed, UNB Libraries is an early champion of the action plan. Much of the reconciliation work in libraries necessitates meaningful consultation with implicated indigenous groups (CFLA/FCAB Reconciliation Committee, 2017). With insights gained from the student cellphilms, we commissioned Mawi'Art, a regional

First Nations artists collective, to provide culturally appropriate artwork for a repurposed reading room on the first floor of the main library. Further consultation with MWC and several other groups, including the MWC-coordinated Council of Elders, the Faculty of Nursing's Aboriginal Nursing Initiative, and the UNB Arts Centre, is guiding decisions regarding room naming, use, and resources.

This and other initiatives, including a regional First Nations bibliography project and national participation in the Canadian Federation of Library Associations' ongoing work toward answering the TRC Calls to Action, are the products of strategic partnerships with cross-campus and regional groups. Brokering relationships is nothing new to libraries; however, our deliberate re-orientation of liaison activities away from traditional collections and services and toward community engagement has contributed significantly to an agility of action in addressing emerging areas requiring attention.

The Establishment of a New Functional Position in Entrepreneurship

Another example of a positive development stemming from the liaison renewal work has been the establishment of an entrepreneurship librarian position. This brand-new librarian position was the natural outgrowth of a campus and community that are becoming more entrepreneurial in their thinking and business development. Again, linking what is happening at the campus level to the library, "leadership in discovery, innovation and entrepreneurship" is included in the UNB strategic plan as an institutional goal (University of New Brunswick, 2010, p. 14). Making it a library priority, as well, UNB Libraries has taken many deliberate, concrete actions to support this vision: it has developed and advocated successfully for a position to support entrepreneurial activities, provided funding to support the growth of market research and business e-resources, and, most recently, has included an Entrepreneurship Centre in its design plans for the creation of a Research Commons in the Harriet Irving Library, the main library on its Fredericton campus.

The first entrepreneurship librarian has already noted a few ways that the role has made an impact on campus and beyond, such as the welcome addition of a person seen to be neutral and unbiased, unattached to a particular centre or group on campus, who can connect all the various players in the space, help break down silos, and encourage collaboration. The librarian has also observed a growing interest in the licensing of market research e-resources, which has led to beneficial cost-sharing arrangements between the library and the Faculty of Business. The entrepreneurship librarian has established close ties, not just with faculty and students but also with other units such as the Office of Research Services (ORS), which is increasingly involved in the technology transfer space and utilizes many market research services to perform due diligence on various industries to identify potential for

the market commercialization of university research. The relationship with ORS has led to the creation of a campus-wide working group, of which the librarian is a founding member, with a mandate to share information and help communicate with each other all the various initiatives and stakeholders within the entrepreneurship ecosystem.

The roots of the entrepreneurship librarian position are in the work that was started and undertaken initially by the business liaison librarian. Once some of the key relationships were developed, the librarian was quick to identify a need on campus for support and services in the emerging area of entrepreneurship, as the demand for service was quickly outstripping time available. Although one of the main constituents, the J. Herbert Smith Centre for Technology Management & Entrepreneurship (TME), is part of the Faculty of Engineering, the business librarian, not the engineering librarian, was consulted frequently as the recognized expert in this area for help with business research and resources. This knowledge of how to assess new markets and potential consumers cuts across disciplines and gives rise to opportunities for collaboration and shared constituencies within the liaison framework. Although entrepreneurship is primarily thought of in terms of business or technology, the city of Fredericton has a vibrant arts scene, which has provided an opportunity to talk about entrepreneurship as a functional area, as it cuts across each and every discipline, including the arts and humanities. Also, what is old is new again. The business liaison librarian astutely points out that librarians have been supporting the creation and success of small businesses forever, although it is now reborn as entrepreneurship and innovation (Collins, 2012).

Not surprisingly, the growth in librarian positions at UNB has taken place primarily in functional areas: the entrepreneurship librarian was created in 2018, along with a STEM librarian position with functional responsibility for research data management, and a new position for 2019, digital collections archivist, has a focus on managing library-created digital assets.

Collaboration via Communities of Practice and Teaming

As societal preferences for visually enhanced communication grows apace with content and authoring tools, it behooves universities to incorporate these into traditional teaching and assessment practices. Inspired—and perhaps emboldened—by UNB Libraries' endorsement of a teaming model for addressing emerging issues, a junior librarian recently invited colleagues across the system to join a community of practice around filmmaking in libraries.

This informal group meets occasionally to discuss how members can support one another in instructional and promotional movie-making projects, whether with advice or an extra set of hands. The group is open to professional librarians as well

as support staff who often bring to their jobs interests and skills beyond original job descriptions. The group is also building relationships with campus audiovisual and marketing units to share expertise and streamline efforts.

Similar to communities of practice, we recognize the teaming model, which brings people together "on-the-fly" to collaborate and share knowledge (Edmondson, 2012) as essential to our change management initiative. This model has, in fact, been in use informally for years and has been explored by others, such as University of Toronto Libraries in its liaison program (Norberg & Wallace, 2015). Such teams are easily assembled (and disbanded), flexible, and agile. They are formed to address emerging issues and grow innovation. Teams should be relatively small compared to our usual committee structure (perhaps no more than four to seven members), openly constituted via inclusive communication channels, and driven by well-articulated objectives and timelines. The membership should take into account where expertise and interest lay across the library system and, where feasible, in other campus units.

The formalization of the teaming model moved some activities off the dockets of standing committees such as Collections Development and Instructional Services. It remains to be seen whether this affects these committees' constitution, responsibilities, and meeting frequency. We remain committed to experimenting with different approaches to project management, and teaming is proving worthy trial ground.

Adoption of Argot

Perhaps a small win, but the authors have observed certain terms, such as "functional specialist" and "communities of practice," being used with more frequency and naturalness during the course of the liaison librarian renewal process. When the renewal process began a few years ago, the use of the term "functional specialist" was a struggle for many, including the facilitators. Some find that the word sounds too clinical, preferring to use the terms "lead" or just plain "expert" to describe functional experts in the library.

Challenges
Pace of the Process

The process of facilitating the evolution of the liaison librarian model at UNB Libraries, as mentioned earlier, has been happening since 2016. Frankly, the authors, both of whom have embraced the new model and the freedom it brings to explore activities outside the traditional spheres of reference, instruction, and collections, have been somewhat discouraged that colleagues haven't all been on board with the direction that the liaison model is taking. However, as we have learned, this is not unusual.

As Roberta Katz of Stanford University says in a lecture on change management and strategic planning, "Not everyone gets on the change train at the same time"

(Katz & Zemanek, 2006). Thus, there is a need to recognize that, due to the individual nature of the work performed as liaisons and academic freedom, not everyone shares the same impetus (or any impetus, for that matter); there are disciplines that are not utilizing their designated liaisons in new and different ways. Not everyone has had first-hand experience of the need to change, and there are no perceived external forces compelling them to adapt.

At times, the authors have wondered if the hybrid model we are using is not a radical enough change—perhaps a complete switch to organizing around functional areas would give the process the urgency that is needed. As an example, in 2018, Western University rolled out a new organizational model, the Organizational Renewal Initiative, revolving around functional areas (Western Libraries, 2019a). If a faculty member in biology, for example, now goes to the online subject guide for the area, instead of seeing the traditional photo of the assigned liaison librarian, there is a shot of the entire Teaching & Learning team (see figure 3.1) (Western Libraries, 2019b). The authors' experience is that it is not enough to talk about change and present evidence; liaison librarians sometimes need to experience a sense of urgency around change in their own work.
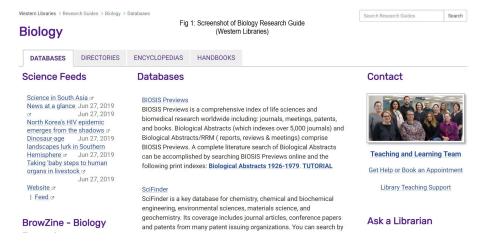

FIGURE 3.1. Western Libraries' biology research guide

CHANGE MANAGEMENT AND LIBRARIAN MINDSETS

Closely related to pace, one of the biggest hurdles that the authors have faced is how to effect change and the process of change management. Although, as facilitators, we have introduced the work of leadership expert John Kotter and his eight-step model of leading change and have assigned readings, including the much-panned among colleagues *Our Iceberg Is Melting* (Kotter & Rathgeber, 2016), we could benefit from

more in-person discussion on the topic. In reality, due to the day-to-day respon-sibilities of our work and the demand for new skills and expertise that liaisons are keeping up with, there is very little time to carve out for sustained conversation, especially on a topic that generates some healthy skepticism.

It is natural for there to be tension created by the resistance to change, and having frequent conversations would provide more opportunities for feedback. There is also the realization that individuals' mindsets can predispose them to either embracing or resisting change. As librarians, anecdotal information points in the direction that many of us in the field have personalities and mindsets that tend to be more fixed in nature. For example, one of the authors attended a library management workshop where a personality test was given as part of the curriculum. The instructor remarked that it is overwhelmingly the case, when the test is given, that the majority of the librarian-participants have conscientiousness as a dominant trait. On one hand, those who are conscientious are known for attention to detail and other positive and beneficial traits to the profession, like being precise and accurate. However, the flip side of this trait carries the attributes of being inflexible with change and preferring a slow and systematic pace.

Outdated Organizational Structure

Another roadblock in our evolution to a new blended model is the realization that our organizational structure does not lend itself to supporting a new hybrid liaison librar-ian. In place for over a decade, UNB Libraries is still organized around the trifecta of reference, collections, and instruction. (It currently has a head of reference and a director of collections, but no one position solely focused on instruction.) Both staff and administration acknowledge that the current structure needs to be updated to better reflect present and future work and new roles and positions. An organizational review is forthcoming, with an internal environmental scan and an external review.

At times, the authors have felt as if we have hit a ceiling, in that the movement forward toward a new, expanded, liaison model has been thwarted by our current organizational structure. For new functional specialist roles, this issue is one of significant concern when it comes to reporting structure. As part of the faculty union, librarians all ultimately report directly to the dean of libraries and (usually) through a head or director for administrative things such as reporting leaves of absence. Newer positions (STEM librarian, with responsibility for research data management, and entrepreneurship librarian) report through the head of reference to give the newest librarians "a home base." This is acknowledged to be an awkward fit, as neither librarian provides traditional reference service on the Research Help Desk unlike the other members of the Reference unit. The authors welcome an upcoming organizational review and see wider organizational changes as having the potential to provide motivation and to create traction for the evolving liaison model.

Discomfort With Engagement Role: From Managing Collections to Managing Relationships

While one of the most exciting aspects of the new liaison model is an emphasis on engagement and outreach, this outward-facing repositioning, although central to the new liaison model, is an adjustment for many. Although there are some opportunities for faculty and student consultation, the majority of collections work is performed internally.

Some librarians miss the title-by-title selection of the past; however, with the shift to electronic resources, and print acquisition budgets continuing to shrink, the time that liaisons devote to collection development has diminished. Now, there is more focus on collections management, particularly with large-scale weeding projects underway to create more room for student study space, which is in high demand. However, like title-by-title selection, the maintenance work is mostly inward-facing as well, drawing on internal reports with circulation data, bibliographic information, etc., for decision-making purposes. The engagement piece of the new liaison model necessitates librarians adopting a different outlook, and one that requires comfort and familiarity with promotion and marketing of library services and the ability to speak about them with confidence.

In King and Solis's article *Liaisons as Sales Force*, the authors call for the utilization of "a specific range of persuasion skills to sell services and solutions" in order to thrive and an enthusiasm to "clearly and genuinely articulate why they believe it will be useful" (2017). However, if liaison librarians are not developing baseline knowledge in important and timely issues such as copyright and research data management, etc., then they are not able to promote or sell library services effectively. An internal survey of librarians at UNB Libraries by one of the authors found that there is an awareness of the need for training in new areas but also the perennial problem of lack of time to do everything. There is a need for more peer-led current awareness to give briefings on hot topics such as open educational resources (OERs), artificial intelligence, and blockchain technology.

Conclusion

While there may be considerable cultural overlap across academic libraries, each university and its library system operate to a considerable extent within their own idiosyncratic environment, with unique pressures and opportunities. While it may make sense strategically, and even administratively, to upend the liaison model entirely in some contexts, it may not in others.

What we have learned is that in our own university context, renewed engagement should not come at the expense of relationships proven to work well for both clients and the library. Some continuity is essential to marketing new and innovative

offerings to constituents and to ensuring that these services evolve to meet front-of-mind needs.

A librarian who for several years has worked closely with the faculty, students, and support staff of an academic department, who has established professional and even personal relationships along the way, may still be a desirable intermediary between constituents and emerging function-based services. Foregoing existing relationships in anticipation of sweeping changes to the academic landscape risks disorienting rather than re-orienting. Trust and relationships are as much ingredients as products of successful change management initiatives.

With the contemporary interest in applying lessons learned from the business world to academia, we are reminded of the ad agencies of the *Mad Men* television series, where account executives and creatives—the liaisons and the functional specialists—provided a potent blend of services. To a diverse clientele, what often matters first are relationships. If great ideas do not originate with these, it is typically where they come to maturity.

Appendix 3A: Scholarly Communications and Copyright/ Licensing for Liaison Librarians

Position Description Framework
Definition

Scholarly communication can be defined as "the system through which research and other scholarly writings are created, evaluated for quality, disseminated to the scholarly community, and preserved for future use. The system includes both formal means of communication, such as publication in peer-reviewed journals, and informal channels, such as [blog posts and/or] electronic listservs" (Association of College & Research Libraries, "Principles and Strategies for the Reform of Scholarly Communication 1," 2003). Scholarly communications services seek to educate and support scholars (be they faculty, graduate students, or administrators) in the sharing, preservation, publication, and promotion of any/all products of their work throughout the research lifecycle. This support goes hand-in-hand with copyright and licensing services that advocate for and support the promotion and protection of authors' rights as they share and/or license their work.

Overarching Goal Statement

Liaison librarians play a crucial role in the advocacy and on-the-ground support for sustainable forms of publishing, scholarly communications, and copyright/licensing. Their close relationship and more-frequent contact with researchers means they have the best entry point to understanding which narratives and trends in scholarly communications appeal to their specific disciplines. It also means that they are often the go-to source for questions and information. As such, it is increasingly important that liaisons understand how conversations related to copyright, author's rights, open access, publishing, research funding applications and mandates, repositories, and research data management are relevant to their faculty.

Guiding Principles

- Educate faculty/researchers of need-to-know trends/narratives in scholarly communications and copyright.
- Support researchers' needs throughout the full span of the research cycle via
  ○ sharing open access versions of published works,

- ○ promoting and supporting researchers in building their scholarly profile, and
  - ○ promoting and supporting storage of research data and gray literature.
- Advocate sustainable publishing.
- Advocate researcher/author's rights.
- Advocate respect of intellectual property (IP) for both researchers and users.
- Knowledge of broader moral motivations at work beyond just the letter of the law/policies
- Encouraging scholars, where appropriate, to open up the products of their research to the public.

Liaison Responsibilities

- Understand relevant narratives in scholarly communications/copyright for each individual discipline covered.
  - ○ Be aware of trends/news in scholarly communications/copyright.
  - ○ Be aware of how faculty disseminate their research.
  - ○ Be aware of how faculty preserve their research.
  - ○ Understand the open access movement.
- Understand the role of our institutional repository, UNB Scholar, as a library service.
- Know when to refer-to/leverage time and expertise (be it librarian, copyright officer, or the Office of Research Services).
- Be aware of institutional copyright plan/system.

Functional Responsibilities

- Determine where researchers are best served within the scope of available services and the discipline-based narratives of scholarly communications and copyright.
- Support liaison education and development via instructional efforts from specialist staff and librarians. Develop a plan for communicating news/ updates to liaison librarians regularly.
- Ensure librarian presence at research presentations and ORS events.
- Express technical needs to systems and associated managers.

Best Practice Examples

- Know which researchers are
  - ○ receptive to sharing their work and
  - ○ publishing and how they publish their research.

- Know when to refer researchers to either the scholarly communications librarian or copyright officer.
- Take opportunities to help share research that falls out of the typical publication cycle.
- Know that UNB Scholar is of direct use
  - to researchers who have received Tri-Agency funding for their research,
  - to researchers requiring an open access component who wish to avoid hybrid open access fees, and
  - to those looking for a venue to share otherwise unpublished or under-exposed research (reports, gray literature).

Existing and/or Desired Internal Support Groups or Mechanisms

- Scholarly communications and publishing librarian
- Copyright officer
- Centre for Digital Scholarship

Campus Allies

- Office of Research Services (ORS)
- Graduate School (SGS)
- Centre for Enhanced Teaching and Learning (CETL)
- Information Technology Services (ITS)

Professional Development Needs

- A more targeted/frequent reporting structure from scholarly communications and copyright specialists could greatly assist in liaison awareness of broader news and trends in these fields.
- Technical literacy development that aims to better frame the differences between databases, repositories, and social media/content sharing platforms.

Current Gaps in Librarian Expertise

- Technical literacy
- Awareness of the general talking points related to fair dealing, sufficient enough to answer cursory questions before escalation to specialists
- Awareness of how to apply broad trends in scholarly communications and/or open access to the specific research and culture of individual disciplines/departments

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