

A case study: the evolution of a “facilitator model” liaison program in an academic medical library

Jon E. Crossno, MLS, AHIP; Claudia H. DeShay, MLS, PhD; Mary Ann Huslig, MLS; Helen G. Mayo, MLS; Emily F. Patridge, MLS

See end of article for authors' affiliations.

DOI: <http://dx.doi.org/10.3163/1536-5050.100.3.006>

Question: What type of liaison program would best utilize both librarians and other library staff to effectively promote library services and resources to campus departments?

Setting: The case is an academic medical center library serving a large, diverse campus.

Methods: The library implemented a “facilitator model” program to provide personalized service to targeted clients that allowed for maximum staff participation with limited subject familiarity. To determine success, details of liaison-contact

interactions and results of liaison and department surveys were reviewed.

Results: Liaisons successfully recorded 595 interactions during the program's first 10 months of existence. A significant majority of departmental contact persons (82.5%) indicated they were aware of the liaison program, and 75% indicated they preferred email communication.

Conclusion: The “facilitator model” provides a well-defined structure for assigning liaisons to departments or groups; however, training is essential to ensure that liaisons are able to communicate effectively with their clients.

INTRODUCTION

With more than 19,000 faculty, staff, students, and residents, the campus of the University of Texas Southwestern Medical Center at Dallas (UT Southwestern) spans several city blocks and consists of a medical school, a health professions school, and a graduate school; 1 affiliated hospital (in 2 physically separate buildings); 2 semi-affiliated hospitals; and a research park. In 2008, to address such complexity and provide better personalized services to members of the campus community, the UT Southwestern Library envisioned a liaison program that would:

- establish a point of contact within assigned campus departments
- identify the information needs of clients in those departments
- save clients' time by providing direct access to resources and services that would help them to perform more precisely and efficiently

The program included a blend of professional librarians and other library staff serving as liaisons within a “facilitator model” structure. This structure did not require liaisons to possess extensive subject familiarity or be expert teachers or searchers. Instead, liaisons acted as “emissaries,” facilitating contact between library staff with skills in specific areas and their departmental contacts. The program was implemented by gradually phasing in select groups on campus, rather than rolling out the service to all

departments at once. By doing this, the library could better manage the potential influx of client requests.

This program can be used for a small or large academic library or in a hospital library setting. It does not require subject specialization or professional librarians for success. Rather, the program model focuses on promoting the library not only to clients who are unaware they have a library, but also to frequent library users who might be either unfamiliar with the library's full range of services or unable to visit the physical library.

LITERATURE REVIEW AND BACKGROUND

Several basic concepts from other liaison programs were used to develop the UT Southwestern Library's liaison program.

- While subject specialization can increase communication with library users, focusing more on “function” (i.e., clinical versus basic science research) can be as effective as, or possibly more effective, than subject specialization [1].
- A formal background in an assigned subject area is not necessarily required for a successful liaison program, and a tiered approach—where “liaisons in one service tier provide only basic assistance, while liaisons in a higher tier provide more specialized services”—could be used instead [2].
- Determining how much time a liaison could expect to spend on liaison activities instead of other job responsibilities is an essential part of the process [3].
- Communicating effectively and regularly leads to successful relationships between liaisons and their contacts [4].
- An effective liaison program should focus on communication, user services, and program evaluation, while distributing the management and



This article has been approved for the Medical Library Association's Independent Reading Program <<http://www.mlanet.org/education/irp/>>.



Supplemental Appendixes A and B are available with the online version of this journal.

oversight of the program among members of a "Liaison Advisory Team" [5].

■ Even with the creation of an advisory team, a liaison coordinator—who would accompany new liaisons on initial visits to assigned departments, develop and maintain communication channels between the liaison and the advisory team (and between liaisons), and prepare theme-based materials for liaisons to take to their departments—is essential [6].

While the cited model programs used only professional librarians as liaisons, the UT Southwestern Library encouraged all staff to participate in the program. This approach recognized the skills and expertise of all staff, while also providing opportunities for individual professional development and lifelong learning.

The essential role of the liaisons was to facilitate communication between their departments and the library. Liaisons referred requests for reference, literature searches, and customized classes to research and education librarians, unless those librarians received the requests as part of their liaison activities.

A seven-person, cross-departmental team—the Library Liaison Team (LLT)—was created to manage the program and included staff from reference and education, public services, collection development, information systems, and technical services. The assistant vice president (AVP) for library services appointed a liaison coordinator who administered and monitored the education and reference referral process and scheduled monthly group meetings of liaisons.

All 52 library employees were invited to participate in the program, and 14 staff members (27%) opted to become involved. Nine of the 14 liaisons were degreed librarians, and most worked in the library's public service areas. Several had preexisting relationships and were allowed to self-select those departments, but staff members without a prior connection were encouraged to choose 1 (or more) divisions within the 2 largest departments on campus: internal medicine and biochemistry.

All fourteen liaisons were required to attend initial training sessions, which were divided into eight modules and presented by LLT members or other staff as needed. Table 1 lists each module with its instructor's service area.

To provide an effective support system for liaisons, the LLT implemented a "mentor" system. In this system, LLT members agreed to mentor one or more of the new liaisons, which involved serving as a resource for their liaisons, reviewing completed assignments from initial training sessions, providing additional one-on-one training where needed, and certifying to the LLT that liaisons were ready to start contacting and working with their departments.

Following certification, each liaison identified an individual to be the primary department contact (i.e., department chairs and/or their executive administrative assistants). Many liaisons were able to take advantage of existing relationships in departments. Liaisons had the option of either making the initial

Table 1
Training modules for the library liaison program

Module	Instructors
Basic reference skills (which databases would be most appropriate for clients to use, etc.)	Reference and education librarians
Referral of received requests (how and where to effectively refer requests for classes, searches, etc.)	Reference and education librarians
Technology support	Information systems staff
Policies and procedures, including collection development and copyright issues	Collection development librarian
Interlibrary loan	Technical services staff
Who does what in the library	Public services staff
"Icebreakers" (i.e., tips on making initial contacts), with an overview of the campus cultural environment	Public services staff
Listening skills, diversity, leadership characteristics, and time management skills	University of Texas Southwestern's Office of Training and Development (a division of the Department of Human Resources)

contact in person on their own or having the liaison coordinators or their mentors accompany them for the initial session.

Regular meetings between mentors and their liaisons provided support in making effective contacts. Mentors also worked with the LLT and the liaison coordinator to ensure that any issues or problems were addressed. The liaison coordinator scheduled monthly meetings for all liaisons, which were structured to provide a forum for discussion and training. During these meetings, liaisons received additional technology training and guidance on the preparation of information materials for their departments.

The LLT included an evaluation component in the liaison program. Two specific methods were identified to obtain useful and meaningful data to assess the program: (1) the library's Client Contact Database (CCDB) and (2) surveys for both liaisons and departmental contacts.

The CCDB was developed locally to record and retrieve data about significant client interactions and to capture specific comments and other feedback from clients. This existing database was enhanced to document liaison interactions. The enhancements included:

- a "liaison" checkbox (to indicate when interactions occurred between liaisons and their departmental contacts)
- a "meeting" checkbox (to indicate when a liaison either met with one or more departmental contacts or attended a departmental meeting)
- a "referral" checkbox (to indicate when a liaison referred a departmental contact to another library staff member who provided a specific service or resource connection)
- standardized list of campus departments (to identify specific departmental contacts and provide opportunities for targeted marketing and promotion activities for those departments using liaison services)

Liaisons were responsible for entering information about interactions with departmental contacts into the database. According to CCDB records, 595 interactions were recorded from January through October 2008, or approximately 60 contacts per month, which ranged from short responses to questions received by telephone or email to in-depth research referrals. When liaisons entered records into the CCDB, they indicated the topic of the interaction and any referrals they made to other library staff, as well as any follow-up questions or outcomes received from their contacts as a result of the interaction. Liaisons and their mentors reviewed the CCDB records for additional follow-up by either the liaison or another library staff member and development of additional materials and/or sessions to address contact needs. In addition, the LLT, liaison coordinator, mentors, and liaisons met monthly to review all development needs during the initial year of the program.

The University of Florida Health Science Center Libraries Liaison Program surveyed both liaison librarians and the client contacts [7]. The University of New Mexico Health Sciences Library and Informatics Center also used two survey instruments: one in which liaisons described the details of their liaison contacts and the other in which departmental contacts were polled to determine their awareness of and familiarity with the liaison program [8]. Using these instruments as guides, the LLT developed surveys to address the local institutional environment: one to gather information from liaisons based on their interactions with contacts (Appendix A, online only) and the other to elicit responses from departmental contacts about their experiences with the liaisons and the library (Appendix B, online only). The library liaison survey asked liaisons to:

- indicate whether liaisons had made contacts in their assigned departments and identify the primary contacts by name
- indicate whether departmental staff initiated contact with liaisons and identify those contacts
- document steps that liaisons implemented to improve understanding and knowledge of their assigned departments (e.g., literature review, medical terminology, continuing education)
- identify any likes and dislikes of being a liaison
- describe how liaison activities have impacted management of their work time and work flow

RESULTS

The LLT surveyed the liaisons at the 6- and 12-month marks of the program's existence to assess increases in liaison connections and improvements in the quality of interactions. In both iterations, liaisons completed 1 survey for each department they served; therefore, the 13 liaisons submitted a total of 29 surveys, with 26 (90%) reporting initial contact was made. The survey results indicated a positive response to initial departmental contacts made by liaisons. Two-thirds (66%) of liaisons were contacted in return by someone from a target department.

Table 2
Departmental contact survey awareness questions and responses

Survey questions	Yes		Total responses
	No.	%	
Aware of Library Liaison Program	80	82.5	97
Know name of liaison	61	63.0	97
Prefer email communication	74	76.3	97
Will email, telephone, or use personal contact with liaison for assistance	67	69.1	97
Will call or come to library for assistance in lieu of liaison	45	46.4	97
Would welcome liaison attendance at departmental meetings	64	66.0	97

After reviewing liaison responses to the six-month survey's question on time management, the LLT and liaison coordinator added a review of time commitments and expectations into the monthly discussion meetings. During these meetings, liaisons shared successful communication methods. In addition, the liaison coordinator and mentors assisted liaisons in preparing introductory materials and initial contact methods.

Survey results also indicated that staff liaisons relied heavily on the guidance of the liaison coordinator and mentors to help direct their activities. Even though staff liaisons were in general familiar with library resources, they often were undecided or uncertain about when and to whom in-depth questions should be referred. To address this issue, the liaison coordinator and mentors reviewed the library's established guidelines for referring requests with the liaisons.

The departmental contact survey was administered at the 12-month point of the program's existence, concurrently with the second liaison survey. A list of potential departmental contacts and respondents was generated from the first liaison survey. Of the 229 individuals who received the survey, 97 responded (42% response rate).

This survey asked departmental contacts to indicate whether they were aware of the program and their liaisons, their preferred methods of contact, and how they would contact the library for assistance with library resources or services. Table 2 summarizes some of these key points. Liaisons were encouraged by the number of departments wishing to have liaisons attend departmental grand rounds and other meetings, because these meetings provided the liaisons with not only a place to meet more contacts, but also the opportunity to gather knowledge about departmental research, gain terminology experience, and provide resource connections to departmental email discussion lists and specific contacts.

The departmental survey revealed a preference for email communication. As a result, the LLT incorporated a standardized template for all liaison-related handouts or flyers, and this template allowed liaisons to use "targeted" content detailing resources relevant to the specific departmental needs, while providing

basic library contact information. Liaisons who were not research librarians received assistance from the librarians in developing the “targeted” resource lists. A few of the departments posted the resource lists, with hyperlinks, to their departmental web pages along with a link to the library’s website for general research.

DISCUSSION

After analyzing the results of all surveys, the LLT identified significant accomplishments of the program’s first year. These accomplishments included regular attendance at selected departmental meetings, lectures, and grand rounds; development of a liaison web page to improve communication with liaison departments, a hospital-focused online library orientation module, and online subject guides tailored to departmental needs; preparation and presentation of tailored liaison department classes; liaison attendance at a national emergency medical service provider meeting; and purchase of recommended electronic textbooks for the library’s collection. Also, a site on the library’s SharePoint intranet was developed and implemented for the liaison group to help share information among liaisons and other library staff.

However, the survey results also indicated several problem areas. These problems included email contact problems (e.g., email messages deleted or not forwarded to interested faculty or staff, requests for appointments with department chairs or staff being rebuffed by “gatekeeper” administrative assistants); lack of motivation when liaisons encountered either departmental “apathy” (e.g., lack of interaction from contacts) or confusion about the library’s existence, location, or resources; and missing, inaccurate, or outdated information on departmental websites.

Based on the survey results, the LLT recommended to the library’s leadership that the liaison program should be expanded and continue for a second year. The following changes were recommended to address some of the problem areas identified in the surveys:

- expanded use of the liaison program’s intranet page for communication and tracking of events
- increased utilization of the CCDB to record activities and time spent on liaison work
- liaison training and certification exercises for presenting orientations
- additional basic training in accessing heavily used electronic database resources

At the same time and based on survey results, an internal reorganization of library staff resulted in the creation of a new library department—Liaison, Marketing and Outreach (LIMO)—that was tasked with leading and further expanding the liaison program and coordinating liaison efforts with outreach and other marketing and promotional activities. LIMO’s presence obviated the need for the LLT and the liaison coordinator, and therefore, the LLT disbanded.

With the start of the second year of the program in January 2009, LIMO recruited additional liaisons from

the library staff. Potential campus departments for new liaison assignments were again reviewed and selected based on perceived departmental need and CCDB data. The decision was also made to include a liaison for medical students.

Based on responses from the liaison survey, more individualized training was planned. The LIMO department revised the training program to include reinforcement exercises to support ongoing learning. LIMO also redefined and improved the mentor relationships to ensure that new and existing liaisons continue to have the support they need.

CONCLUSIONS

After reviewing the survey results and CCDB data, the program was judged to be successful by the AVP for library services and all interested parties (i.e., LLT, LIMO, and liaisons). The program is in its third year under the guidance of the LIMO department, with twenty-one liaisons serving fifty-nine departments.

As this “facilitator” model program does not require subject specialization or professional librarians for success, it may be used for a small or large academic library or in a hospital library setting. Liaisons act as emissaries, facilitate use of virtual library resources, and establish contact between their departments and skilled library personnel. The program was implemented in stages, focusing on a select group of departments on campus. Smaller institutions might find this approach more feasible than a traditional subject liaison program.

This “facilitator” model proved successful in connecting departments to library resources through links on departmental websites; connecting departmental staff with library services through orientations and one-on-one sessions; increasing the number of contacts through attendance at departmental meetings, grand rounds, and other events; and providing handouts and flyers about licensed databases to departmental staff that include links to the library’s website.

Campus departments that participated in this program were better served than they were prior to the implementation of the program. Faculty and staff were able to find out more information about library services and resources from their liaisons, and the liaisons learned a great deal about their departments’ particular information and resource needs. Finally, many nonparticipating departments have expressed interest in being connected with a library liaison in future iterations, based on the library’s promotion of liaison services and through word-of-mouth anecdotes from faculty and staff colleagues.

ACKNOWLEDGMENTS

Laurie L. Thompson, AHIP, AVP for library services, was the guiding force in creating this program, and her vision of including librarians and other staff in the liaison program assured there would be enough people to launch the program effectively. Other significant individuals included Tracy Beeson, Sharon

Cardwell, Paul Denning, Shobana Jayaraman, JJ Whitaker LeBlanc, Barbara Nunn, Catherine Schack, Eric Upchurch, and Curtis Wright. Their assistance was invaluable in conducting the background research, developing the program model, and implementing and managing the first year of the program. Because the initial group of liaisons came from all library departments, their supervisors and managers must be recognized and thanked for allowing staff to find the time to participate in this voluntary program.

Finally, the universities and colleges with liaison programs answered many questions about the specifics of their programs' development, implementation, and effectiveness. Without their timely responses and assistance, the liaison program at UT Southwestern would not have been successful.

REFERENCES

1. Tennant MR, Cataldo TT. Development and assessment of specialized liaison librarian services: clinical vs. basic science in a veterinary medicine setting. *Med Ref Serv Q*. 2002 Summer;21(2):21-37. DOI: http://dx.doi.org/10.1300/J115v21n02_03.
2. Cataldo TT, Tennant MR, Sherwill-Navarro P, Jesano R. Subject specialization in a liaison librarian program. *J Med Lib Assoc*. 2006 Oct;94(4):446-8. (Available from: <http://www.ncbi.nlm.nih.gov/pmc/articles/PMC1629419/>). [cited 27 Mar 2012.]
3. Nalen JE. A time-budget study of the George Mason University Libraries' liaison program. Poster session presented at: 2006 Library Assessment Conference. Proceedings of the 2006 Library Assessment Conference: Building, Effective, Sustainable, Practical Assessment; Charlottesville, VA; 25-27 Sep 2006.
4. Livingston J. The benefits of library liaison programs for small libraries: an overview. *Med Ref Serv Q*. 2003 Spring; 22(1):21-30. DOI: http://dx.doi.org/10.1300/J115v22n01_03.
5. University of Connecticut Libraries. Academic liaison program [Internet]. Storrs, CT: University of Connecticut; 2004 [rev. 8 Jun 2006; cited 24 Apr 2007]. <<http://www.lib.uconn.edu/services/liaison/prog00.htm>>.
6. Harvey Cushing/John Hay Whitney Medical Library, Yale University School of Medicine. Library liaisons [Internet]. New Haven, CT: Yale University [24 Apr 2007]. <<http://www.med.yale.edu/library/liaisons/welcome.php>>.
7. Tennant MR, Cataldo TT, Sherwill-Navarro P, Jesano R. Evaluation of a liaison librarian program: client and liaison perspectives. *J Med Lib Assoc*. 2006 Oct;94(4):402-9, e201-e204. (Available from: <http://www.ncbi.nlm.nih.gov/pmc/articles/PMC1629425/>). [cited 27 Mar 2012.]
8. Teal J, Bowler-Hill S. Evaluation of a departmental liaison program in an academic health sciences library: lessons learned and advice for program partners. Paper presented at: 35th Annual Meeting of the South Central Chapter of the Medical Library Association; Albuquerque, NM; 20-24 Oct 2007.

AUTHORS' AFFILIATIONS

Jon E. Crossno, MLS, AHIP (corresponding author), Jon.Crossno@UTSouthwestern.edu, Collection Development Librarian; **Claudia H. DeShay, MLS, PhD**, Claudia.DeShay@UTSouthwestern.edu, Education Librarian; **Mary Ann Huslig, MLS**, MaryAnn.Huslig@UTSouthwestern.edu, Manager, Liaison, Marketing, and Outreach; **Helen G. Mayo, MLS**, Helen.Mayo@UTSouthwestern.edu, Reference and Liaison Librarian; Library, The University of Texas Southwestern Medical Center at Dallas, 5323 Harry Hines Boulevard, Dallas, TX 75390-9049; **Emily F. Patridge, MLS,*** emily.patridge@cabarruscollege.edu, Medical Librarian, Cabarrus Health Sciences Library, Cabarrus College of Health Sciences, Carolinas Medical Center-Northeast, 401 Medical Park Drive, Concord, NC 28025

Received August 2011; accepted December 2011

* At the time this article was written, Emily Patridge was Outreach and Marketing Librarian, Library, The University of Texas Southwestern Medical Center at Dallas.