

Feature

From Theory to Practice

Implementing a Mission, Vision, and Values Statement to Support Change in an Academic Library Liaison Program

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Abstract

Academic library liaison programs historically varied in their functions and adapted to their organizational needs and priorities. This case study examines the integration of a mission, vision, and values statement into the liaison program at Florida Atlantic University Libraries. Originating from business and organizational theories, these statements have been adopted by nonprofit organizations, including academic libraries, to guide administrative processes and services. The study highlights a re-visioning of an established liaison program during a period of transition. This fostered a shared understanding of the library's priorities and documented its goals and objectives. This alignment was particularly crucial as Florida Atlantic achieved the Research Intensive (R1) classification, necessitating adaptations of liaison roles. The creation of the mission statement facilitated employee buy-in and continuous feedback through input from librarians and administrators. Additionally, the statement played a vital role in supporting the morale and well-being of the librarian liaisons, ensuring their concerns were understood and addressed. This collaborative approach supported the liaison program's evolution in response to institutional changes.

Background

Liaison programs have long existed in academic libraries but with varying names and descriptions. They are described in general or focused terms and possess roles that depend on the operational needs and priorities of a given library. Mission, vision, and values statements originated in business, management, and organizational theories and applied these theories to an organization's operations. They were initially used by for-profit businesses and were gradually incorporated into higher education and then into academic library settings, many of which are nonprofit organizations. Mission, vision, and values statements have been applied to academic library settings for administrative and organizational processes.

History of Liaison Work

In the 2020s, libraries have faced severe budget cuts, shrinking departments, disinterested or overworked populations, rising expectations from an on-demand culture, and burnout, all of which have prompted calls for change.¹ Some advocate for increased connection through embedded librarianship within the liaison model, whereas others support functional models that move away from traditional liaison programs. Embedded librarianship fosters closer relationships with faculty by ensuring liaisons are consistently available but is effective only when assigned to a single department.² Functional models alleviate some burdens by focusing on library functions rather than subject specialization. Hoodless and Pinfield identify factors driving this change, including ensuring

service consistency, acquiring new expertise, improving efficiency, instigating cultural change, aligning with university strategy, and responding to budget constraints.³ Some libraries have returned to the liaison model, whereas others resist restructuring, fearing that functional librarians are less effective in building strong relationships with faculty. Many libraries have adopted hybrid approaches to suit their communities' unique needs.⁴

The importance of liaison programs as the face of the library cannot be understated. Libraries provide vital information and resources for research, and the liaison model remains necessary.⁵ There continues to be a disconnect between library resources and the library itself, with liaisons offering an essential connection. However, expectations and demands have changed. A 2019 study found high burnout among liaison librarians, particularly manifesting as emotional exhaustion and depersonalization.⁶ This suggests a lack of fairness and connectedness, adding to the stress of a heavy workload.

Liaisons need more support to carry out their duties efficiently. Many articles offer guidance on enhancing programs and connecting with faculty but lack specifics on measuring progress, aligning activities with academic goals, or defining success.⁷ Most focus on outward effects and success but not the inward impacts on librarians. No articles mention a support system or internal infrastructure to guide liaisons, which could help mitigate stress and burnout. New programs need supporting infrastructure to succeed and provide a cohesive sociocultural and political system.⁸ These needs and a discernible gap in the literature suggest that including a mission, vision, and values statement in a liaison program can be used to address its objectives; define roles; and be a means of alleviating changing library resources, role expectations, and organizational priorities.

Origin of Mission Statements

Management experts define mission statements as important starting points to guide organizational decision-making and strategic planning.⁹ Each part of these statements communicates important aspects of an organization's underlying purposes, goals, and priorities. The mission statement conveys the scope and character of an entity and justifies its existence. The mission also defines whom the entity serves, the results of the services provided, and what distinguishes an entity and an offered service from others like them. A vision statement describes an entity's aspirations and how achieving them will transform the organization. Unlike the mission statement, a vision statement can change with an organization's priorities. Values, or the final part of the statement, articulate the organization's core principles, with the purpose of guiding its decision-making, particularly when few precedents or examples to follow are available.

Mission statements apply scientific management and strategic management theories. Frederick Taylor's scientific management theory structured work functions and employee roles into hierarchies. Scientific management theory defined employee job functions and processes to minimize and resolve conflict between employees and managers. With its origins in the late nineteenth century, Taylor's theory continues to influence present-day management theories.¹⁰ In the 1960s, strategic management theory used elements of scientific management and then considered an organization's internal and environmental factors for planning and creating its processes. This theory examined organizational roles and functions, along with an organization's services, markets, technology, and internal and external relationships. The purpose was to provide tools for managing increased organizational complexity and uncertainty. Management experts currently believe strategic management is highly relevant for organizations because many

operate with frequent disruption and discontinuities;¹¹ academic libraries can be easily argued as organizations with these attributes.

Mission statements were first implemented in business and were gradually adopted in the nonprofit sector. They are essential to nonprofit organizations for defining their roles, services, goals, and partnerships.¹² Management expert Peter Drucker concluded that missions strongly influence the function and success of nonprofit organizations. He believed they enable nonprofits to generate ideas, implement their services, and identify additional measures of success, adding that for-profit businesses can learn from the nonprofit sector's mission-driven focus.¹³

Benefits and Critiques of Mission Statements. Many studies suggest that mission statements have a direct, positive impact on an organization's performance when the mission emphasizes who is served and is intentionally assimilated into an organization's functions.¹⁴ These effects are pronounced when the statements identify an organization's values, beliefs, purpose, competencies, and distinct characteristics. Mission statements also have internal organizational benefits. They provide a structure for employees to follow when carrying out their duties and define shared values and the means to fulfill organizational goals.¹⁵

Mission statements are often criticized for not being integrated into an organization's operations or not communicated to employees and external stakeholders. They can sometimes lack clarity or relevance to an organization or be viewed as too prescriptive in limiting employee roles and actions.¹⁶ Researchers have not established a causal relationship between the use of mission statements and organizational outcomes, but they are sure of an association.¹⁷

Use of Mission Statements in Academic Libraries. Academic libraries have used strategic planning since the 1960s, and its use increased in the 1980s as a result of disruptions from the use of new technologies, budget reductions, and expectations to do more with fewer resources.¹⁸ The academic library literature provides many case studies and a few qualitative studies on mission, vision, and values statements in college and university libraries.

One qualitative research study analyzed the mission statements of recipients of the Association of College and Research Libraries (ACRL) Excellence in Libraries Award. Baker concluded that missions describe a library user's multifaceted needs within an academic setting and can set a library apart from others. Baker and other researchers believe libraries use their missions to demonstrate their willingness to participate in and support their organizations, and to maintain their relevance and secure continued support.¹⁹

One multiple-case study investigated how academic libraries used strategic planning to make organizational decisions. Casey found that libraries used planning and mission statements to guide them through disruptions such as job role changes and reassignments, construction or renovation projects, and leadership transitions.²⁰ Notably, one of the libraries in Casey's study included its liaison program in its mission statement. The program's roles were defined through the document. The document also supported the library's new vision and anticipated ways to meet the needs of library users and its stakeholders.

Mission statements have been used by library departments. Georgetown University librarians created a core competency statement that was later included in a department-level mission statement when its research and instruction department merged with its collection development department. The document was purported to create shared understandings of the new department and communicate its roles within the library and its university while also linking core librarian competencies to the library's strategic planning.²¹

Case Study: Academic Liaisons at Florida Atlantic University Libraries

Florida Atlantic University (Florida Atlantic) is a public, doctoral-granting higher education institution located across three counties along the southeastern coast of Florida. It has over 32,000 students and 3,371 faculty and staff personnel.²² Its main library is located on the Boca Raton campus, and two additional libraries are available at its partner campuses in Jupiter and at Harbor Branch Oceanographic Institute in Vero Beach. Its University Libraries employ sixty-eight people, twenty of whom are nontenured faculty librarians and forty-eight of whom are staff members.²³

Before the Florida Atlantic University Libraries had its liaison program, library outreach was done individually by librarians, who frequently interacted with university faculty and students or had outreach in their job assignments. Other librarians based their outreach on their collection management duties for assigned colleges or departments. Librarians frequently reported their outreach in their annual activity reports, but these activities were not subject to other types of review or approval in terms of what they distributed. Although librarians informally shared information with each other, some thought that having a common message and following the university's and libraries' branding would provide a standardized, professional voice that had the input of other library units, including their administration.

The libraries liaison program originated from a project undertaken by two librarians in a leadership development working group. The librarians envisioned creating a cohesive approach and structure for promoting the libraries' services, collections, and events. Although the leadership development working group was disbanded, one of the librarians, a research and instruction services (RIS) librarian who had been assigned outreach responsibilities, continued the project with the approval of the library's administration. Two other RIS librarians joined the project the following year.

The team of librarians reviewed the existing literature, including working papers by the Association of Research Libraries (ARL) about academic liaison programs. It studied the liaison structures of peer institution libraries. The team members also examined their observations about library outreach and compiled their colleagues' ongoing questions and concerns, which included the following:

1. Delineating the expected roles and responsibilities of liaison outreach
2. Describing broad activity areas through which liaisons would provide services or share information, such as collection management, instruction, and research or information services
3. Providing recommendations for librarians to optimize their outreach to university faculty and departments
4. Suggesting ways university faculty can engage with the libraries.

The result was the document "Academic Liaisons Working Draft," which put forth a structure for the libraries' liaison activities.²⁴ The document included input from the library administration and department heads. It outlined an approach to promoting library services that were directly relevant to the university from library departments such as scholarly communication, digital libraries, and collection management.

The liaison document was not officially finalized, but the library administration followed its recommendation to have one liaison coordinator. Coordination was assigned to a collection

management (CM) librarian who was hired soon after the document's completion. The document was provided to the CM librarian, who adopted most of it to structure liaison activity for the duration they served in that position. At that time, liaisons were RIS librarians, and one was from the digital library department.

Transitions in the Liaison Program

Many changes in administration and personnel occurred within the library after the initial academic liaison draft. The first was the formation of the libraries' external relations department. Although the new department was responsible for coordinating library events, public relations, and branding and marketing, it did not subsume all outreach done by liaisons. The liaison coordinator collaborated with the new department to create campus announcements and social media posts, make collateral such as flyers, and promote library events. Liaisons adopted unified approaches in their messaging and regularly promoted many library events and services to their contacts while also customizing their messaging for their respective disciplines. For example, a science, technology, engineering, and math (STEM) librarian could promote library services and events they knew were directly relevant to the students and faculty in those areas while minimally promoting services and events that were not.

A new dean of libraries was hired and brought a new vision for the library. They wanted to further mobilize the liaison program and redefine librarian roles to support the university's goal of attaining the Research Intensive (R1) level of the Carnegie Classification of Institutions. The dean envisioned increasing engagement levels between librarians and university faculty, specifically to where librarians provided higher levels of research and information support to departments. The dean wanted liaison librarians to continue to regularly promote library events and services, such as the launch of its new institutional repository. In addition, the dean increased the participation of other librarians as liaisons. Fewer librarians were available to serve as liaisons as a result of reassignments and resignations; in addition, hiring was done very slowly because of flat library budgets, increasing electronic resource subscription costs, and human resource policies. From that point, all librarians were assigned to be liaisons, including those who had not done outreach. Additional personnel transitions affected the liaison program. After the resignation of the CM librarian who was the liaison coordinator, a new RIS librarian was appointed to coordinate. The lead author of the liaison document was reassigned to an interim library administrative position. These multilevel organizational changes led to updates in the liaison program and its document to reflect the libraries' new objectives.

Steps Taken in the Re-Visioning Process

A primary concern of the interim administrator and liaison coordinator was creating and supporting a new team of liaison librarians who were taking on unfamiliar roles, particularly in outreach. The administrator and coordinator considered the impact of these changes on librarians in terms of their workloads and adapting to the new expectations, as well as their effect on individual and overall morale. A second concern was communicating the purpose and value of the liaison program to the new liaisons while also providing updates and clarifications for experienced liaisons. The interim administrator and liaison coordinator, with guidance from the dean of libraries, worked together to implement updates in the liaison document and program. They incorporated the knowledge from the previous liaison program and continued to use the academic liaison final draft to guide updates.

Environmental Scan of Liaisons. The initial step in revitalizing the liaison program involved understanding the needs of the liaisons. To ascertain the expectations of the liaisons, an informal survey was conducted to perform an environmental scan. The survey results were consistent with existing literature, indicating that liaisons required additional support to take on the new roles. When asked what the liaisons would like to see, comments ranged from “a place to feel comfortable for liaisons to come together and discuss ways to be a good liaison . . . there can be monthly talking points or people just come with grievances” to “hire more reference librarians instead of putting this on overworked librarians you already have.” Other liaisons commented that there was no definition and too many gray areas between what they typically do and liaison work. The liaison program needed a more defined purpose and a clearer understanding of the roles.

The environmental scan provided additional insight into librarian liaison concerns. All liaisons expressed concerns about the workload involved with the additional assignment, given the uncertain nature of those duties. New liaisons expressed uncertainty about their roles, raising questions about teaching responsibilities, outreach, event participation, and overall expectations. Even those with extended tenure at the libraries, but who were new to liaison work, were unclear about the objectives they were promoting. Feedback from experienced liaisons highlighted the need for resources such as flyers, videos, and library promotional materials. The experienced liaisons also wanted a greater voice in giving input into external communications. The survey revealed that liaisons needed professional development retreats or workshops to clarify roles and responsibilities, regular feedback sessions to address concerns and provide guidance, access to marketing materials such as brochures and digital content to aid in outreach efforts, and increased involvement in decision-making processes to ensure their voices were heard.

Inclusion of a Mission, Vision, and Values Statement. In response to the concerns of liaisons and to provide additional structure to the liaison program, the survey results led to the addition of a mission, vision, and values statement to the academic liaison draft. The interim library administrator thought communicating the purpose of the program (mission), its aspiration (vision), and core guiding principles (values) would answer many questions about the liaison program’s purpose, especially to those new to the role. Because the administrator saw many changes in the library during their career, they thought the statement could provide guidance for future or unforeseen changes to liaison activities. This insight guided the redevelopment of the liaison program and the subsequent addition of a mission, vision, and values statement that served as a guide to help build the infrastructure that would support the liaisons’ needs, outline the program’s values, and define the priorities set forth by both administrative staff and the liaisons.

The subsequent step was to align these needs with the expectations of library administration, particularly with the administration’s vision for liaisons to engage in more outreach, build closer relationships with faculty in their subject areas, and continue to collaborate with the external relations department to promote the library. The initial mission, vision, and values document was created and incorporated the dean’s feedback. The final draft was presented to the liaisons, who then had the opportunity to review it and offer feedback. Once feedback had been integrated, the final copy was stored in a central access point, a liaison Microsoft Teams folder where all liaison documents, including flyers, email templates, and other pertinent information, were stored, along with the original version of the academic liaison draft. The updated document was also reviewed at the liaison retreat, where further discussion took place.

Launching Updates in the Liaison Program

The liaison program had a soft launch of its changes when the coordinator started their role. The first major decision was to institute one in-person meeting per month. Initially, two liaison meetings were scheduled per month; however, this frequency was seen as burdensome to many liaisons. In response, the liaison meetings were dropped to one per month. The monthly in-person meetings at the main campus library were instituted with the goal of advancing participation and feedback from the liaisons, particularly with the addition of new librarian liaisons. Previously, liaison meetings were conducted online via Teams or Zoom, which resulted in low participation. Despite their initial unpopularity, the in-person meetings have proven to be a more effective forum for liaison engagement. One liaison is exempt from the meeting requirement because their primary assigned location is at a partner campus, and this liaison participates by videoconferencing. The meetings provide liaisons with opportunities to connect and offer feedback. The absence of recorded meetings creates a more open environment for liaisons to express their concerns. Annually, a survey is distributed to all liaisons to determine the most convenient day and time for future meetings and get liaison feedback and suggestions for the overall program.

The second change to the program was to use meetings to clarify the roles and responsibilities of a liaison. This was done by providing professional development. One priority was to increase liaison knowledge of the library's information sources and services. The liaisons would be aware of the library's resources that support their subject areas and then promote this information to their departmental contacts. New liaisons were introduced to the sources, whereas experienced ones received updates. Although vendor database demonstrations do not always occur during liaison meetings, liaisons are highly encouraged to attend them. For example, liaisons were invited to meet Sage's sales representative, who introduced the company's recent and extensive database rollout. A second priority of professional development was for liaisons to identify and learn about research emphases within their departments. Finally, librarians and other guest speakers at liaison meetings discuss general library topics like scholarly communications and the research life cycle that undergird all the university's disciplines. Liaisons can then explore how these topics apply to their respective areas of assignment.

About six months after the soft rollout of liaison program updates, a half-day liaison retreat was organized. It served dual purposes: It functioned as a professional development training session and marked the launch of the program's mission, vision, and values statement. To introduce the mission statement, liaisons were assigned articles to read beforehand that were specifically selected to support the program and the inclusion of the mission, vision, and values statement. The articles helped clarify roles and expectations but also opened the discussion to what is practical when building relationships with departments and faculty. These subjects, along with the mission, vision, and values statement, were the primary focus of the liaison retreat.

Initial Responses. According to initial liaison feedback, the liaison best-practices document and the library's mission, vision, and values statement offered guidance, but they weren't always practical. Some liaisons thought they were out of their comfort zones or that the suggested activities did not fit into their schedules in terms of time. It was pointed out that because liaisons have many areas to cover, they might not be able to reach out on either a weekly or monthly basis to their faculty as suggested. In fact, it was suggested that this might function as a detriment to building a relationship for some faculty. However, it was generally agreed that liaison work should be approached as a relationship rather than the more traditional transactional approach. The shape the relationship takes is entirely up to the liaison. The best practices and mission statement were suggested to be a guide for setting priorities or goals instead of a specific set of tasks to complete.

The primary objective of the mission, vision, and values statement was to establish a foundational framework for the program. This objective has been successfully achieved, as the statement set the standards upon which the program could be developed. It recommended best practices for liaisons who operate in various roles beyond their liaison duties and advocated for a more collaborative approach to liaison work. These foundational principles facilitated the implementation of secondary goals, which included alleviating liaisons' concerns regarding anticipated workloads, setting clear expectations, and establishing quantifiable goals for the future.

Through enhanced collaboration and cohesion, workloads were effectively reduced. Liaisons were provided with "plug-and-play" branded collateral and library promotional content from the external relations department and had autonomy to adapt them to the needs of their liaison areas. Additionally, the mission, vision, and values statement emphasized that the relationships between liaisons and their respective departments are unique to them, ensuring that no individual would be evaluated based on another's performance. The collaborative environment also provided liaisons with the opportunity to express concerns or opinions, thereby mitigating the risk of burnout. Furthermore, the statement aligned the program with the overarching goals of the library and the university, which aim to provide academic support and foster exploration within a research-intensive setting.

Informal feedback from liaisons indicates that the program and the mission, vision, and values statement have been well received. Many expressed thanks or happiness with the direction the program is headed. A formal anonymous survey will be distributed to gather more comprehensive feedback on areas for improvement and aspects that are functioning well. Informal feedback from the dean of libraries, library administrators, and other departments suggests the liaison program is progressing in the desired direction. Nonetheless, there are areas for improvement, particularly in fostering greater collaboration between the library and faculty members so that they go beyond transactional interactions and toward relationship building.

In this case study, Florida Atlantic University Libraries coupled a mission, vision, and values statement with its existing liaison program documentation, with the purpose of orienting its new liaisons to the program's underlying goals and objectives. The new document provided liaisons with valuable guidance for their new role and created a foundation for a reenvisioned liaison program. It contributed to creating a shared understanding of the library's priorities and, in the process, documented the library's culture and defined its goals and objectives.²⁵

The mission statement was also used for internal purposes to guide the liaison program in adapting to frequent changes within the library and the university. The processes of identifying the program's primary groups served, listing its priorities, and defining its vision were intended to facilitate additional discussions or actions that would need to take place. This will be very important to guide the liaison program because Florida Atlantic University attained the Research Intensive (R1) level of the Carnegie Classification of Institutions about six months after the mission statement was completed. In the future, liaisons may find that they have redefined roles and will deliver new services that align with those offered by other R1 libraries.

The liaison program's mission statement followed a recommended practice by including internal stakeholders in its creation and having employee buy-in.²⁶ The libraries' administrators provided input throughout the process, and the new and experienced liaisons alike had opportunities to provide input to the statement. As a result, further changes were made to the liaison program, and the coordinator continues collecting feedback throughout the year.

Recommendations

In the past, liaison work traditionally focused on assigned subject areas for CM and less on instruction and outreach, but it gradually incorporated the latter areas in response to the breadth of changes in academic libraries. Although the Florida Atlantic University Libraries liaison program was intended to adopt these three broad areas, its current focus remains on collections and outreach. One reason is that novice librarians, or those with specializations apart from traditional liaison or instruction duties, need guidance via mentoring and professional development activities to transition into these roles. Liaisons will also need time, both in their work schedule and as they gain experience, to attain new skills and confidence levels. Although a mission statement can communicate a library's or program's priorities, it will need to be complemented with additional support in terms of time, resources, and professional development.

One recommended action for the libraries' liaison program mission statement is to use it to create quantitative measures of the program's services. This will help the program demonstrate how its services are operationalized within the library and university.²⁷ These measures can be used for evaluative purposes so that the strengths, challenges, and gaps of the program can be identified, leading to refinements to the liaison program. Finally, measures of liaison library services can strengthen the library's advocacy efforts. These measures can present objective descriptions of who the program serves and the impacts of its service. Wadas stated that libraries are vulnerable to losing support from their parent organization if they do not articulate their contribution to the organization's mission and if their organizational goals are not known.²⁸ In addition, libraries are increasingly operating with fewer resources, coupled with higher expectations, so they must be good stewards of their limited resources.²⁹ A mission statement with measurements derived from it can address these concerns.

Although higher education accrediting agencies require institutions to have mission statements to attain accreditation, an academic library is not required to have one as part of its parent organization's accreditation process.³⁰ Any academic library, or its departments or programs, can use a statement for external purposes to document their fit, alignment, and support of their parent institution. For internal purposes, a mission, vision, and values statement can support librarian liaisons in managing the frequent changes in their library resources, work assignments, staffing, and organization. Academic libraries should consider applying and integrating tools such as mission statements to facilitate the many changes they have experienced and will continue to experience in their organizations. Most importantly, these tools can be used to support the well-being of librarians and staff so that they can continue to provide library services and demonstrate their value to their colleges and universities during times of change.

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