Who Let the Librarians Out?

Embedded Librarianship and the Library Manager

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Guest Columnist

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One of the newer ideas being discussed and tried in libraries is "embedded librarians." The phrase comes from "embedded journalists," and places a reference librarian right in the midst of where the user is to teach research skills whenever and wherever instruction is needed. In colleges and universities, our users are in the classroom, especially the electronic classroom. In business they are in the research lab or office. In hospitals they are with doctors and nurses. Embedded librarians are like bibliographic instruction librarians that have been totally immersed—this is more than collaborating with classroom faculty members. The embedded librarian is David Shumaker's area of research, and here he gives a good introduction to the topic and some specific guidelines on how to start an embedded librarian program in your library.

What next for the column? I am on the lookout for ideas and writers on the broad range of topics that relate to running a reference or public service department. I encourage you to suggest column topics and to become an author and write on any successful reference programs or services.—*Editor*

Interesting things are going on in the world of library user services.

At a campus of Penn State University, Librarian Russell Hall—instead of limiting his role to providing two in-library bibliographic instruction lectures—arranged to attend every class meeting of the first-year "Effective Speech" course. As a result, student research skills and the quality of their speeches showed a marked improvement, and Hall planned with the instructor to further increase his role the next time the class is taught.[1] At Wake Forest University, Susan Smith and Lynn Sutton accompanied students and faculty of the course "Social Stratification in the Deep South" on a two-week bus trip. The experience was so successful for all concerned that at the end of the course they immediately began planning to continue the practice.[2]

At the headquarters of Fairfax Media, the largest news media organization in Australia, a library space downsizing dispersed librarians into the office areas of the various news bureaus they serve. When a subsequent office move offered them the opportunity to recentralize in new library space, there was no sentiment in favor—the new arrangement had proven too successful. Customers valued the new services and the new relationships that they had established with their librarians.[3] At the Mitre Corporation, a librarian's office was moved from the library to the space occupied by his prime customer, and the change resulted in heightened visibility and new opportunities to provide valued services.[4] And at the University of Sheffield, United Kingdom, the Nursing

Department and Library collaborated on plans to involve the clinical librarian in the important knowledge-sharing conversations that take place as the nursing shifts change—so that she could provide essential clinical literature to advance the delivery of excellent nursing care.[5]

These librarians broke out of their libraries, built new relationships, and found new ways to deliver new kinds of services to the people in their communities who need them most. While others may wring their hands with worry over the competition that digital libraries and the Internet pose for traditional reference and public services, these folks have found ways to create new services and new value for their libraries by getting out into the communities they serve!

This change is both driven and enabled by the increasingly digital, networked, and mobile society we live in. We've known for a while that libraries' monopoly on factual information is gone. People don't need us to find out who won the National League pennant in 1946, or who was the only president born in Pennsylvania. Anyone with a computer and a network connection can now do their own research anytime, from anywhere. As E. Stewart Saunders said in this space a year ago, "The Internet and Google have changed the information landscape. Libraries now compete for a share of the information market."[6] That's true, but the same technologies that are competing with traditional reference service have freed us reference librarians from the chains that have kept us in the library. We're free to roam and share our expertise wherever our customers are because we can, in a sense, take many of our most valuable tools with us.

What's really critical here is not just getting out of the library. It's that the very nature of our service, and the relationship we have with our customers, changes—or can change, and must change—when we start roaming. The librarian at Penn State didn't just hang around before and after class, waiting for students to ask reference questions—he actively participated in class discussions, sharing his knowledge of information sources and insights on research methods. The librarian at Mitre didn't sit behind his desk and wait for reference questions—he went to meetings, participated in conversations, and found himself pulled in and consulted about upcoming technical projects as well as the organization and management of the group's library. The librarian at the University of Sheffield isn't just supposed to sit at a desk and wait for questions either—now she's supposed to be a participant in the nurses' conversations.

The fact is reference librarians have deep knowledge and special skills that have the potential to be immensely beneficial to many of those in our communities. But we can only unlock that value when we establish the relationships that allow us to join their conversations—to identify their unexpressed information needs. Because, as we all learned in Reference 101, people often have a tough time articulating what they need to know—and many times they don't articulate it at all. We need to build relationships so we can gain deeper insights into what our customers are doing and how they will use the information we provide. We need the background knowledge about them and their work that will enable us to perform successfully and establish our credibility.

Let's be clear: This isn't a call to abolish the reference desk or traditional reference services. It's not a call to close the library or forget about the library as place. It's not even a suggestion that we abandon our efforts to establish virtual reference services. All those things have their place. Rather, this is a call to do something else new as well, to explore new territories outside the library and take new opportunities to build working relationships—true collaboration and partnerships with our customers—as we've never been able to do in the past.

Some may say, "But we've had 'liaison librarians' for years. What's really new here?" The question is, Have liaison librarians been outwardly focused and engaged in developing collaborative relationships with customer-partners, or have they been library-focused, seeing collection development, not teaching or reference and research, as their primary role? There's substantial evidence in the literature to suggest the latter. See, for example, RUSA's *Guidelines for Liaison Work in Managing Collections and Services*, which defines liaison work as "the process by which librarians involve the library's clientele in the assessment and satisfaction of collection needs."[7] See also the extended discussion of research findings by Rodwell and Fairbairn.[8] The difference is between saying "we'd like you to help us build the library collection" and "let's work together to achieve our mutual goals."

The name often given to this new kind of user services librarianship in recent years is "embedded librarianship"—"embedded" because the librarian becomes a member of the customer community rather than a service provider standing apart. The embedding may often involve physical collocation, such as the office moves at Fairfax Media and Mitre, or the class attendance by Hall, Smith, and Sutton. Or it may involve a virtual collaboration, such as interacting with dispersed students in a computer-based distance learning environment. It fits well within the academic, specialized, and corporate sectors because there are parent organizations (universities and corporations) with well-defined groups of library customers. But public librarians and librarians in primary and secondary education may be thinking that this model doesn't apply to them. Their customer groups may not be so well defined. And, after all, the examples used so far have all been taken from higher education and specialized corporate libraries. Still, some of these ideas and principles may well apply. For example, the magazine *Teacher Librarian* is dedicated to the principle that instruction and student achievement are enhanced when librarians are able to form multidimensional partnerships with classroom teachers. Wouldn't it be wonderful if school libraries were so well staffed that librarians could afford to specialize and develop deeper relationships with the classroom teachers in a particular grade or a particular academic department of a secondary school? The *Guidelines for Liaison Work* mentioned above incorporate a section on liaison in public libraries. So why not extend the concept in the public library sector as in the others? As T. Berry Brazelton said, addressing the 2008 ALA Annual Conference, librarians

have an "opportunity to be part of the family system," should become partners with parents in the learning and development of young children, and should move from "objective involvement to empathic involvement" in the family system.[9] A way to do this is to enable librarians to spend more time out in the community, participating in community groups.

It's a telling fact that in the literature, many embedded library service relationships are established because of customer initiatives or external events. The Wake Forest, Penn State, and Fairfax Media stories are all cases in point. We library managers shouldn't sit back and wait for these opportunities to come to us any longer. It's time for us to start the process and lead the way!

But how do you begin to create the kinds of relationships that are forming at places like Wake Forest, Penn State, Fairfax Media, Mitre, and the University of Sheffield? And what are the pitfalls to watch out for along the way?

Here are some ideas for initiating and sustaining an embedded library service:

ASSESS YOUR READINESS

Readiness comes in two kinds: library readiness and organizational readiness.

Is your library ready for the transition? Are your staff members interested in trying new things? Do you have staff members who would be good candidates for an embedded role? Do they have good interpersonal skills, apart from good reference interviewing skills—they're not the same! Do they also have the skills and flexibility to take on the assignments your customer groups are likely to need? These can range from in-depth research and current awareness to embedded instructional services or information and knowledge management. And do they have enough background in relevant subject domains, or the willingness and ability to learn, to be credible and successful?

How about your organization? A proposal to let the librarians out of the library might be a radical departure for your institution. What is your institution's culture? Is there a willingness to listen to—and support—new ideas, to take a risk that might pay off in terms of improved organizational performance, increased student achievement, and so on? Starting with your own boss, are senior managers both accessible and truly open and supportive for a good new idea? Does your library have credibility within the organization to get a hearing for its initiatives?

PILOT, REVIEW, REVISE, AND EXPAND

Not every customer group needs this kind of service, and not every librarian has the skills or the motivation to provide it. Furthermore, your library operation can't sustain an overnight, wholesale conversion to a new service model either. So start small. In this, as in many other change processes, piloting, reviewing, revising, and gradually expanding are probably the steps on the road to success.

Identify one or two customer groups who always seem to be asking for more than you can provide. List a few faculty or researchers who are always in the library and with whom your reference librarians may already have good working relationships. Identify a couple department heads, deans, or other senior leaders who have taken a benevolent interest in the library. Your neediest customers and your best friends are probably the best candidates to approach with a pilot proposal.

ESTABLISH MANAGEMENT-LEVEL AGREEMENTS

You're building a collaborative relationship—a partnership. This is different from a transactional service relationship. In a service relationship, the emphasis is one-way: What can the server do for the customer? In any partnership, it's not just about what I can do for you; it's about what we can do for each other. One of the joys of our profession is how service oriented we all are. That's great, but, if we're going to succeed in embedded relationships, we have to recognize that we have needs too. Ultimately, we cannot be successful if our needs are not met, and the way to do so is to establish management-level relationships and management agreements.

This means that the chief librarian or public services director can't leave this work to the individual reference staff. Managers can't push staff out the door; they have to lead the way. So, start by thinking of the resources and cooperation you might need to make the partnership a success. Apart from money (see "Watch Out for Common Pitfalls" later in this article), here's a list to get you started:

- **Space.** Where will the embedded librarian work if collocated with the customer group? Will the office space be full-time, dedicated space, or part-time, shared space?
- **Inclusion in group communications and collaboration.** How does the group work together? Is there an e-mail list restricted to members? Is there a shared computer workspace that is limited to members? If the librarian is to be a partner within the group, access to these resources is essential!
- **Invitations to meetings.** When the staff and leadership of the customer group meet, will the librarian be included? If not, she might as well stay in the library. Will the customer manager commit to including the librarian?
- **Senior management sponsorship.** When staff members are developing new ideas and formulating new projects, will the customer manager encourage getting the librarian's help? When an assistant professor is developing a new course or writing a grant, will the department head or dean urge involving the librarian—maybe even putting the librarian into the grant?
- **Feedback.** Will the customer leader both volunteer feedback—positive and negative—and remain accessible to you, the library manager, when you come calling to find out how things are going?

It's unlikely that these "management agreements" will be signed or enforceable. They don't guarantee that problems, and slippage of support, won't occur. But, by discussing them face to face, and following up with an e-mail to document your understanding, you'll be doing your job as a manager. You'll establish clear expectations on all sides and create the conditions for your staff to succeed.

SUSTAIN THE EMBEDDED SERVICES INITIATIVE; FOLLOW THROUGH ON COMMITMENTS TO MANAGEMENT PARTNERS AND STAFF

Like a gardener that waters the garden and pulls the weeds that begin to sprout, the library manager must sustain the embedded services initiative.

Follow through on your commitments to the customer manager. Be sure to hold the meetings you said you would—maybe quarterly or even annually—to review progress at the management level. Respond immediately if problems arise.

Support your embedded reference staff. Some may need help adapting to their new role. Meet with them regularly and watch for signs that they are having trouble. Provide guidance on the issues they are having trouble with. On the other hand, some may adapt too well. They may become so popular with their new customer-colleagues that they are overwhelmed with requests. You do not want them to be like the embedded reference librarian who said she avoided eye contact when she walked through her customer's office area because she could not take on any more projects. Watch for burnout among these folks (see the comments on workload-leveling in the next section).

WATCH OUT FOR COMMON PITFALLS

Three pitfalls to watch out for are failing to allocate adequate funding and staff resources to both ongoing library services and the new embedded services; inadequate attention to workload leveling among embedded staff and between embedded and nonembedded staff; and overlooking the threats to library staff cohesion.

Like any initiative, starting and developing an embedded library services program costs something. Space, equipment, and management oversight time are all involved, but the biggest resource involved is the time of the librarian providing the service. After all, if that person is a new hire (not recommended), then there must be a budget line for their salary. And if a current staff member is to give up current duties to provide embedded services, what will happen to those activities? Is the library able to do without them, or will someone else pick up the slack? Who filled in when Russell Hall started attending every class of the "Effective Communication" course? What happened to the other tasks that Susan Smith and Lynn Sutton were responsible for when they left on their two-week bus trip with the "Social Stratification" course?

It's possible that a pilot program can be funded by the library budget, and that the resource effects of Hall's, Smith's and Sutton's initiatives were easily absorbed. But what if these programs expand? The resource effects could be substantial. The wise library manager will plan for success by identifying some activities that can be dropped to save money or preparing her boss for a possible request for more funds—or by asking the customer to pay directly for the new, embedded service. Failure to plan for the effects of success on budgets and staff may drive a promising initiative to early termination.

Another way to drive a promising embedded library services initiative to an early end is not to address workload balancing among staff. The librarian mentioned above who avoided eye contact to keep from getting more requests is a ripe candidate for burnout and is unwittingly sabotaging the program. That librarian needs to know that there is backup for the crunch times, whether that backup is a reference librarian in the central library or another embedded librarian whose workload is currently light. Even librarians who are competent at negotiating requests and due dates with their customers can be met with such an enthusiastic response that they lose control of their priorities. The library manager has to be ready to step in and resolve ongoing overload issues at the management level. This intervention can involve agreeing with the customer management on limits to the embedded librarian's responsibilities or getting increased funding for more staff to help share the workload.

The third pitfall for embedded library services programs is loss of library staff cohesion. One of the great things about working in the library is that other librarians work there. Our colleagues all speak the same professional language we do, and they're there to consult on a tough reference question or console us after a difficult interaction with a customer. The embedded librarian who is collocated with a customer unit is separated from this peer support group. Personal relationships, and the professional knowledge sharing that goes along with them, may suffer. The wise library manager will plan for this eventuality and create a mix of formal and informal activities, such as staff meetings or social events, to keep the librarians' community of interest healthy.

Reference and user services librarians are embarking on an exciting and challenging journey. They're getting out of the library and heading for classrooms, labs, and even tour busses. They're embedding themselves with research groups, faculty members, and courses. They're building new relationships and delivering new, valuable services. Yet, as they do so, they raise new challenges for user services management. So, library directors and public services managers, I ask: Will you let the librarians out? I challenge you to do so!

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