Redefining Roles for the Digital Revolution: Reference, Repositories, and Reading Rooms

Susan A. Massey, University of North Florida
Lisandra R. Carmichael, University of North Florida

Available at: https://works.bepress.com/susan_massey/21/
Redefining Roles for the Digital Revolution: Reference, Repositories, and Reading Rooms

by

Lisandra Carmichael, Associate Dean
Susan A. Massey, Head of Discovery Enhancement
Thomas G. Carpenter Library, University of North Florida

Presented at the SEFLIN Regional Conference
Changes in the Profession: New Frontiers, Challenges, and Opportunities
July 28, 2016
Learning Objectives

Gain a better understanding of how to successfully:

• Address change management
• Redefine roles and responsibilities
• Develop an in-house training program
• Help staff adjust to impending changes

Phrase by Dyer, W. W. [photo]
Rapid MegaChange\(^1\) (Restructuring) at UNF

Between 2011 and 2016, we were engaged in:

- 16 faculty searches
- 13 repurposed librarian & staff positions
- 13 new user interfaces and services
- 10 new staff software & technology systems
- 10 reorganizations within departments
- 8 projects transforming stacks into study spaces
- 2 campus entities moved in the library
### Technical Services Division Timeline

<table>
<thead>
<tr>
<th>Year</th>
<th>Events</th>
</tr>
</thead>
<tbody>
<tr>
<td>2010</td>
<td>Created a new Electronic Resource Librarian position</td>
</tr>
</tbody>
</table>
| 2011 | Implemented Digital Commons  
|      | Formed Digital Projects Department  
|      | Implemented EBSCO Discovery Service  
|      | Renamed Cataloging to Discovery Enhancement  
|      | Created Metadata Librarian position |
| 2012 | Merged State University library catalogs  
|      | Initiated Reference Management Project  
|      | Started using CampusGuides for internal documentation |
| 2013 | Implementation of RDA nationally  
<p>|      | Initiated Gov Docs Management Project |</p>
<table>
<thead>
<tr>
<th>Year</th>
<th>Events</th>
</tr>
</thead>
<tbody>
<tr>
<td>2014</td>
<td>• Started Next-Gen ILS selection</td>
</tr>
<tr>
<td>2015</td>
<td>• Reorganized Technical Services Division</td>
</tr>
</tbody>
</table>
| 2016 | • Began Sierra ILS Implementation  
|      | • Conducting search for Head of Collections & Acquisitions  
|      | • Withdrew print Reference Collection |

Blue Sky Studios, The Peanuts Movie: Dream Big [movie trailer]  
Retrieved from [http://tinyurl.com/jlfnwlg](http://tinyurl.com/jlfnwlg)
### Public Services Division Timeline

<table>
<thead>
<tr>
<th>Year</th>
<th>Events</th>
</tr>
</thead>
</table>
| 2011 | • Implemented LibGuides and LibAnswers  
      • Implemented One Search user interface |
| 2012 | • Initiated reference management project  
      • Initiated LibChat and RefAnalytics  
      • Experimented with PATH tutoring in library  
      • Changed service model at research desks |
| 2013 | • Initiated Gov Docs management project  
      • Created Coordinator of Instruction position  
      • Completed Media Collection relocation  
      • Created Online Learning Librarian position  
      • Created Marketing & Student Outreach Librarian position  
      • Initiated renovation - Library Commons |
<table>
<thead>
<tr>
<th>Year</th>
<th>Events</th>
</tr>
</thead>
</table>
|      | • Created First Year Outreach Librarian position  
|      | • Initiated a study room reservation system  |
| 2015 | • Training series for Public Services staff  
|      | • New Head of Research & Faculty Outreach position  
|      | • ITS Help Desk moved to library space  
|      | • Library entry turnstiles implemented  |
| 2016 | • Director of Public Services position filled  
|      | • Print Reference Collection removed  |

Blue Sky Studios, The Peanuts Movie: Dream Big [movie trailer]  
Retrieved from [http://tinyurl.com/jfnwig](http://tinyurl.com/jfnwig)
Kurt Lewin’s Planned Change Theory

- A system of analysis that represents social forces in a group setting to gather insight into the desire for and resistance to a specific change.

- Lewin’s *social field* concept describes a social group in its natural setting and *phase space* describes certain aspects or conditions of social problems.

- Certain social *driving forces* increase or drive change and these driving forces can act either both towards or away from something, while *restraining forces* oppose driving forces. Lewin called these forces *forcefields*.

- The status quo of groups in organizations exists in what Lewin called a state of *quasi-stationary equilibrium*.

- The overall structure the organization and determine the range of changes that are possible.³

- The actual setting of the groups within that organization are going to So Lewin defined planned change as: transplanting the force field of a quasi-state of equilibrium from one level at the beginning of the change to the force field of another quasi-state of equilibrium level at the end.
Example of a Planned Change:
Implementation of a Succession Planning & Management Program (SP&MP) at a Library

---

SM&MPs represent the Phase Space concept
Librarians at Academic Libraries represent the Social Field concept
Current Practices for Preparing Key Leadership Positions represent the Quasi Stationary Equilibrium concept

**Driving Forces** (add forces in the desired direction)
- Contributes to the implementation of the organization’s strategic plan
- Identifies library staffing needs
- Increases the talent pool of promotable employees
- Provides increased opportunities for high-potential workers
- Taps the potential for intellectual capital in the organization
- Helps the individual realize their career plans within the library profession
- Encourages the advancement of diverse librarian groups
- Improves dean’s response to environmental demands

**Restraining Forces** (diminish opposing forces)
- Lack of support from top leaders in the organization
- Organizational politics
- Quick fix attitudes
- Low visibility
- The rapid pace of organizational change
- SM&MPs are not effective for simply filling-in vacancies at libraries
- Too much paperwork
- Too many meetings

---

**Step 1. Unfreezing**
- Assessing current problems and practices
- Demonstrating the need
- Determining requirements
- Linking program to libraries’ strategic and HR plans

**Step 2. Moving**
- Preparing and communicating the action plan
- Conducting meetings
- Conducting training
- Engaging employees
- Preparing development plans

**Step 3. Freezing**
- Stating the library’s needs
- Testing the library’s bench strength
- Establishing internal promotion policies

---

*Figure 3. Lewin’s planned change theory applied to SP&MP implementation at academic libraries. The concepts in Lewin’s (1947) planned change theory (in italics) are applied in this example of SP&MP implementation at academic libraries. Created 2016 by L. R. Carmichael.*
Planning Change Using Lewin’s Theory

Lewin stated that to understand how to implement change one needs to first ask:²
1. Why does the process under the current circumstances proceed on this particular level?
2. What are the conditions for changing the present circumstances?

Lewin described the three steps necessary for change as:²
1. unfreezing (if necessary) the present level,
2. moving to the new level, and
3. freezing group life at the new level.

What *REALLY* Happened

We flew by the seat of our pants!

Photo by Honza Čech CC0 retrieved from Pixabay
(https://pixabay.com/en/users/HonzaCech-37689/)
Unfreezing Technical Services

• Many years of status-quo
• External driving forces for change
  • Merge of Florida university library catalogs
  • RDA cataloging rules
  • Campus Distance Learning program
  • Campus CMS migration
• Internal driving forces for change
  • Digital Commons
  • EBSCO Discovery Service
  • CampusGuides
Technical Services: Step 1 - Unfreezing Staff

- Lots of meetings
- Webinars about library future
- Values assessment with staff
- Visual communication aids
  - Workflow charts
  - Acquisitions statistics
  - Implementation timelines
  - Task analyses

Retrieved from Pixabay CC0
Technical Services: Step 1 - Unfreezing
### Technical Services: Step 1 - Unfreezing

#### Cataloging Task Analysis

| TASKS/COMPETENCIES        | Check metadata for item | Match record in item | Check record for item | Catalog record in item | Item Record | Item Record | Library Control data | Search Cataloguing data | Search, Continue search | SearchContinue, search | Search, Continue search | SearchContinue, search | Search, Continue search | SearchContinue, search | Search, Continue search | SearchContinue, search | Search, Continue search | SearchContinue, search |
|---------------------------|-------------------------|----------------------|-----------------------|------------------------|--------------|--------------|----------------------|-------------------------|------------------------|------------------------|------------------------|------------------------|------------------------|------------------------|------------------------|------------------------|------------------------|
| Theses                    | X                       | X                    | X                     | X                      | X            | X            | X                    | X                       | X                      | X                      | X                      | X                      | X                      | X                      | X                      | X                      | X                      |
| CURR/MAT                 | X                       | X                    | X                     | X                      | X            | X            | X                    | X                       | X                      | X                      | X                      | X                      | X                      | X                      | X                      | X                      | X                      |
| CurMat Man/Nonfiction    | X                       | X                    | X                     | X                      | X            | X            | X                    | X                       | X                      | X                      | X                      | X                      | X                      | X                      | X                      | X                      | X                      |
| CurMat Textbook Series   | X                       | X                    | X                     | X                      | X            | X            | X                    | X                       | X                      | X                      | X                      | X                      | X                      | X                      | X                      | X                      | X                      |
| CurMat "Y" Lá            | X                       | X                    | X                     | X                      | X            | X            | X                    | X                       | X                      | X                      | X                      | X                      | X                      | X                      | X                      | X                      | X                      |
| AUDIO/VISUAL             | General & Jazz CDs      | X                     | X                     | X                      | X            | X            | X                    | X                       | X                      | X                      | X                      | X                      | X                      | X                      | X                      | X                      | X                      |
| Classical CDs            | DVD/Video              | X                     | X                     | X                      | X            | X            | X                    | X                       | X                      | X                      | X                      | X                      | X                      | X                      | X                      | X                      | X                      |
| MUSIC                     | Analyzed Music Sets     | X                     | X                     | X                      | X            | X            | X                    | X                       | X                      | X                      | X                      | X                      | X                      | X                      | X                      | X                      | X                      |
| Scores (M Class)         | Serials (new or title change) | X                  | X                     | X                      | X            | X            | X                    | X                       | X                      | X                      | X                      | X                      | X                      | X                      | X                      | X                      | X                      |
| Microfilm                | Gov Docs               | X                     | X                     | X                      | X            | X            | X                    | X                       | X                      | X                      | X                      | X                      | X                      | X                      | X                      | X                      | X                      |
| Gov Doc ER/Website       | US Doc Microfiche       | X                     | X                     | X                      | X            | X            | X                    | X                       | X                      | X                      | X                      | X                      | X                      | X                      | X                      | X                      | X                      |
| US Doc Books/pamphlets    | US Doc Holdings         | X                     | X                     | X                      | X            | X            | X                    | X                       | X                      | X                      | X                      | X                      | X                      | X                      | X                      | X                      | X                      |
| Gov Doc Serials           | FEMA Documents          | X                     | X                     | X                      | X            | X            | X                    | X                       | X                      | X                      | X                      | X                      | X                      | X                      | X                      | X                      | X                      |
| Maps                      | UPF Site Maps           | X                     | X                     | X                      | X            | X            | X                    | X                       | X                      | X                      | X                      | X                      | X                      | X                      | X                      | X                      | X                      |
| Map Data (brochures)      | NGO Maps               | X                     | X                     | X                      | X            | X            | X                    | X                       | X                      | X                      | X                      | X                      | X                      | X                      | X                      | X                      | X                      |

---

October 2010

UNIVERSITY OF NORTH FLORIDA
Technical Services: Step 1 Unfreezing

Cataloging Workflows

BEFORE

AFTER
What Libraries Can Do During Step 1

Lewin stated to break open the shell of complacency and self-righteousness it is sometimes necessary to bring about deliberately an emotional stir-up.²

According to Rothwell when implementing a SP&MP the organization can:⁴

- Assess current problems and practices
- Demonstrate the need
- Determine organizational requirements
- Link the program with the libraries’ strategic and human resources plans
- Benchmark program processes at other libraries
- Obtain & build leadership's commitments to systematic programs

Technical Services: Step 2 - Moving

• Division reorganization
  • Digital Projects
  • Special Collections
  • Acquisitions incorporated Serials and Electronic Resources

• New and repurposed positions
  • Metadata Librarian
  • Resource Description Librarian
  • Electronic Resource Librarian
  • Head of Digital Projects
  • Digital Projects support staff

• New workflows for Digital Projects and Electronic Resources
Technical Services: Step 2 - Moving

New Electronic Resources Workflow
Technical Services: Step 2 Moving

- Training
  - RDA
  - Merged catalog
  - Digital projects
  - Electronic resource loads
- Project orientation
  - Weeding and relocating collections to make space
  - Selection of Special Collections and Archives to digitize
  - Processing of large donations
- Documentation: CampusGuides
What Libraries Can Do During Step 2

During this step in a planned change people begin to resolve their uncertainty and look for new ways to do things and believe and act in ways that support the new direction.\(^5\)

According to Rothwell when implementing a SP&MP the organization can move by:\(^4\)
- Preparing and communicating the program action plan
- Conducting meetings
- Conducting training
Technical Services: Step 3 - Refreezing

- Continual cycle (the New Normal)
  - Train for new technologies
  - Document policies and procedures
- Reassess positions and workflows
  - Staff turnover is an opportunity for change
  - Challenge: hiring freeze
- Address ongoing internal and external changes
  - New ILS
  - Changes in acquisitions focus
What Libraries Can Do During Step 3

Refreezing is when changes occur and librarians embrace the new program and all it entails. Some practical steps that can be taken include anchoring the changes into the culture, developing ways to sustain the change, providing support and training, and celebrating success.⁵

According to Rothwell when implementing a SP&MP the organization can:⁴

• Test the organization’s bench strength
• Establish an unequivocal internal promotion policy
• Prepare individual development plans to close the gap
• Use internal development when appropriate to realize learning

B. C. Ministry of Transportation [photo]
Developing a Training Program to Help Staff Cope with Redefined Roles

Public Services Professional Development Series

<table>
<thead>
<tr>
<th>Summer Cohort 2016</th>
<th>Archive</th>
<th>Additional Online Training Opportunities</th>
<th>Florida Memory Webinars</th>
<th>State Library of Florida Webinars</th>
</tr>
</thead>
<tbody>
<tr>
<td>Summer 2013 Schedule</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Week 1: July 9th &amp; 11th</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Technology in the Library</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Week 2: July 16th &amp; 18th</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>OneSearch</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Ebooks</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Week 3: July 23rd &amp; 25th</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Library Website</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Week 4: July 30th &amp; August 1st</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Working at a Service Desk</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Week 5: August 6th</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>LibAnswers</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Week 6: August 13th</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>LibAnswers</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>LibChat</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Week 7: August 20th</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Graduation</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Ebooks</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Week 1: Technology in the Library**
- Printing Copying and Frequently Asked Question Guide
  - Intranet guide that will discuss printing and copying functions as well as display the many questions we get about both.
- What Software Is Available in the Library
  - Publicly available guide on LibGuides maintained by the Systems department that displays what software is currently on the public computers in the library.
- Completed Handout: Technology in the Library
  - A completed version of the handout given for the Technology in the Library training sessions.
- Presentation for Technology in the Library
  - Michael's presentation can be found on the Systems Training Programs Intranet guide.
- Card Services in the Library
  - LibGuide that provides information on copying, printing, card vending, and supplies vending locations in the library. Includes floorplans and FAQs.

**Week 2: OneSearch and Ebooks**
- OneSearch
  - Publicly available guide on LibGuides that gives quick and in-depth information about how to use OneSearch.
- E-book Collections
  - Publicly available guide on LibGuides that includes descriptions and links to UNF e-book collections.
- Completed Handout: OneSearch and Ebooks
  - A completed version of the handout given for the OneSearch and Ebooks training session.
- Presentation for What Is the Catalog
Notes


Questions?

Lisandra R. Carmichael l.carmichael@unf.edu
Susan Massey susan.massey@unf.edu