Moving from Subject Specialists to a Functional Model

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Introduction

In summer of 2017 the University of California, Riverside (UCR) Library undertook a major structural reorganization of research, instructional, and collection development activities. Like many academic libraries at large research institutions, the library had been organized along a subject specialist model for decades. Each subject specialist held broad responsibilities for reference, instruction, and collection development for one or more academic departments. However, as a result of the implementation of the *UCR Library Strategic Plan*, the library made the decision to move from the subject specialist model to functional units for research services, teaching and learning, and collection strategies. In this case study we introduce the context and reasons for the reorganization, and describe the reorganization process in detail, including providing the timeline. We give an overview of the services, core competencies, staff roles, and training plans for each new department. Finally, we discuss future steps and lessons learned after eight months into the process.

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Background

Strategic Plan as Springboard

Following the appointment of a new university librarian (UL) in 2013, the UCR Library embarked on a strategic and holistic planning process to identify the needs of campus stakeholders, to develop vision and goals, and to create a road map to ensure that we continue to meet and anticipate the campus curricular and research needs. Working with an external consultant using the appreciative inquiry strengths-based approach over a seven-month period, the library facilitated meetings, workshops, focus groups, and other forums in order to surface and support insights and aspirations of the library and campus-wide stakeholders to inform the *UCR Library Strategic Plan*.

The vision and mission of the final *Strategic Plan*[2] were broad and focused on empowering positive change, accelerating academic achievement and the creation of knowledge, and energizing campus engagement in and transformation of local, national, and international arenas. This was heady stuff. It was clear to Library Administration that if we were to position ourselves to meet the lofty goals we were setting, we would need to make some profound changes to the actual work we were currently doing in research and instructional services, as well as in our organizational structure. Not surprisingly, the UCR Library had a very traditional setup of reference librarians who were also subject specialists. There were two parallel discipline-based departments in which librarians/subject specialists spent their days doing a mix of traditional reference, course-based library instruction, research-support workshops, and a smattering of collection development. Nothing significant had changed in responsibilities or structure for 10 to 15 years.

Developing Framing Questions

After the strategic planning process wrapped up in the summer of 2014,

deputy university librarian Ann Frenkel initiated discussions with the reference librarians about how to meet the goals and objectives on research and teaching outlined in the *Strategic Plan.* The same external consultant from the planning process was engaged to help facilitate these meetings. Initially we held a working session where we posed the following questions to ourselves:

1. What structures and processes would enable the organization/ group to get to the work that can't yet be done?
2. What is the best way to structure ourselves to best provide services and partner with faculty and students?

These discussions resulted in the identification of specific initiatives and expertise needed, including instructional design, learning assessments, a scalable instructional program, digital scholarship, geospatial information, data management, copyright consultations, and maker services.

The librarians then discussed a variety of different structures and reviewed the pros and cons of the discipline-based model and the functional model, as well as a variety of hybrid and matrix structures. The librarians came to consensus around specific values within any structure that were important, including the ability to focus on user groups, to coordinate efforts, to set priorities, and to communicate value to external stakeholders.

> "...the functional structure would best address the need to focus on areas of new expertise and services in a reality of constrained staffing."

Determining a Functional Structure

While the librarian discussions themselves did not result in consensus or a decision regarding an appropriate structural model, the content of the discussions (including the pros and the cons) were communicated

to library leadership. Using the information uncovered by the librarian discussions, in early 2015 the university librarian and the associate university librarians made the decision to form a new functional structure consisting of a Teaching and Learning Department and a Research Services Department.

Library leadership believed that the functional structure would best address the need to focus on areas of new expertise and services in a reality of constrained staffing. The structure would eliminate unnecessary duplication of expertise and services between two departments that had been providing similar and parallel services. Certainly any structure requires coordination regarding disciplinary expertise, however, the specific focus on teaching and research goals in the *Strategic Plan* made the choice clear. Additionally, a functional model allows for more targeted skill development for librarians working in these units; historically, one challenge of subject specialist models has been divided attention between disparate responsibilities. The functional model would allow for focused expertise-building. Finally, subject specialist duties were not equally allocated throughout the discipline-based model; some reference librarians liaised to two departments with a handful of faculty, while others worked with multiple departments, containing hundreds of faculty. A functional model would allow for a redistribution of responsibilities, with a goal of more equal responsibilities.

Coincidentally, the UCR Library had two vacant department head positions, so after a delay (unrelated to the reorganization process itself), two job announcements were created for a director of Teaching and Learning and for a director of Research Services. Frenkel was clear that the actual forming and implementation of the model must be done collaboratively with the two positions hired and in place since the relationship between the two departments would require a certain amount of interdependence. Interestingly, the unanticipated length of time between the initial planning discussions in 2014 and the actual "boots on the ground" in May 2017 had the beneficial result of a fuller

socialization within the staff of what felt to be a quite radical move away from the traditional subject specialist reference librarian model.

Reorganization Process

While the inspiration for this transition came as a result of the discussions and planning process described in the first part of this paper, the reorganization process began in earnest when the director of Teaching and Learning (T&L) and director of Research Services (RS) were hired in July 2016 and May 2017, respectively.

After completing an environmental scan of similar, large, academic libraries and current local practices, the directors of T&L and RS proposed the following major changes:

- Transition to a functional model, with teaching and instruction responsibilities handled by T&L, and research support (with the exception of course assignments) handled by RS.
- Agreement that support for undergraduate students would most often fall to T&L, while graduate and faculty level support would be most often provided by RS. We recognized that we would need to work closely together and remain flexible, as there is plenty of overlap and in some cases it is not obvious which department should take point.
- Removal of collection development responsibilities from T&L and RS librarian roles.
- Eventual transition from the librarian-staffed reference desk to a student-staffed information desk, which would be a shared service between T&L and RS.

We were cognizant that these proposed changes would impact departments across the library, particularly Collection Development Services. After discussing the changes and their implications, the associate UL (AUL) for collections and scholarly communication joined the reorganization. We began including librarians in the Collection

Development and Scholarly Communication division in subsequent meetings.

The changes proposed when the AUL for collections and scholarly communication joined included:

- Collection Development Services would be reimagined as Collection Strategies to focus specifically on proactive strategies for planning, building, and stewarding collections to support teaching and research.
- Bibliographers in Collection Development Services would become collection strategists and would place a new emphasis on data-driven decisions and assessment, and a focus on disciplines rather than departments.
- Responsibility for scholarly communication support would move from Collection Development to the Research Services department.

We had two primary mechanisms for gathering structured information to help inform our departmental visions. First, we created a service area template and asked librarians to describe the services they currently offered or worked with. Second, we created a survey that asked the librarians to describe their approach to outreach (anything that had not been covered by the service area documents or subsequent discussions). The

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outreach document was confidential and only shared between the directors, deputy UL, and the individual librarians. We also invited less structured feedback in other ways throughout the reorganization process, as referenced in the reorganization timeline below.

Once the general structure and the specific positions were defined

for the three departments, we initiated a reflective process where librarians were asked to complete statements in which they indicated their perceived strengths and preferred roles within the new organization structure (see Appendix). After the reflective statements were completed, the project team convened to place the librarians in positions aligned as closely as possible with their current skills, interests in professional growth, and their desired positions. All librarians were placed in one of their top three choices for positions.

We went into this process knowing that change can be extremely difficult to manage. Key aspects of our approach to the reorganization included:

- **Focus**: We felt that it was better for everyone involved if we communicated and kept to a timeline, rather than allowing the process to drag on without an end in sight. That said, we adjusted our schedule if necessary.
- **Transparency:** When we didn't know the answer to a question, or solution to an issue, we admitted it. We made clear when particular issues would require the departments to work together, rather than imposing a solution.
- **Iteration**: We sought feedback through a variety of channels—in-person and online, anonymous and not—and made adjustments to continuously improve our plan.

Reorganization Timeline

From start to finish, the active reorganization process took four months, from late May through late September 2017. We have included the timeline below.

The timeline does not include the weeks in which we did the initial information-gathering steps as described above, but we do allude to when we discussed them in group meetings.

Date	Activity Description	Details	Supplemental Information
Week 1	Meeting I: Deputy UL/ Directors only	In our first formal meeting, we drafted a project plan and transition timeline, which allowed us to map out meetings and deliverables, and consider what it would take to make the transition by the time the fall quarter began.	N/A
Week 2	Group Meeting I	In this meeting, led by the deputy UL and directors, we provided an overview of the reorganization process, reviewed the timeline, and introduced worksheets to gather information on services and liaison activities. Librarians were encouraged to ask questions and share feedback.	See Appendix for worksheet examples.
Week 3	Planning Retreat: Deputy UL/ Directors only	The directors presented initial visions for their departments to the deputy UL. Together, we discussed how the two proposed departmental structures would work together and planned activities for the first group retreat.	N/A

Date	Activity Description	Details	Supplemental Information
Week 3	Group Retreat I	This half-day retreat was focused on gathering librarian input on new directions for instruction- and research-related services. Activity 1—Where We've Been / Where We're Going Activity 2—Keep / Toss / Create Activity 3—Defining Our Values	See Appendix for descriptions of activities.
Week 5	Group Meeting II	This meeting allowed time for librarians to react to the retreat and to the exercise focused on gathering information on service areas. We reviewed next steps and introduced our plan for gathering information on how librarians approach outreach. Librarians were encouraged to ask questions and share feedback.	N/A

Date	Activity Description	Details	Supplemental Information
Week 7	Group Retreat II	The directors synthesized feedback and introduced departmental visions in 20–30 minute presentations, covering expertise needed and training programs that would be involved to get there. Librarians were encouraged to ask questions and share feedback.	N/A
Week 7	Directors present department visions to UL and AULs	At this time, the decision was made to include the Collection Development department in the reorganization process, in light of findings from the retreat, librarian feedback, and departmental visions.	N/A
Week 12	Group Retreat III	Final departmental vision and service plans were revealed. Most of the time was dedicated to dialogue between the directors and librarians. At this meeting, we asked librarians to complete a reflection statement (due at a later date) sharing their knowledge, skills, abilities, and interests and suggesting the areas/roles they were most interested in.	See Appendix for reflection questions.

Date	Activity Description	Details	Supplemental Information
Week 17*	Drafted SOPRs for the new librarian roles	The directors drafted statements of professional responsibility (SOPRs) for the librarians.	N/A
Week 18	Individual meetings: supervisor and librarian	The new roles were shared via email, followed by in-person meetings between the new supervisor and staff member to discuss the SOPR.	N/A
Week 20	Launch of new departments	By this date, the new departments were in place, and new SOPRs were finalized.	N/A

* **Note:** The gap between weeks 12 and 17 represented labor relations discussions related to the reorganization. These discussions were required as UC librarians are academic appointees who are represented by an exclusive bargaining unit. The reorganization process needed to pause until these discussions were completed.

For each new unit, the managers compiled information in four key areas: services, core competencies, roles, and training. We felt that these were some of the most important areas that librarians would want to understand and could provide feedback on. These are listed below, along with some additional context.

Teaching and Learning Department
Director: Dani Brecher Cook

Services

There are currently over 20,000 undergraduate students enrolled at the University of California, Riverside, so one major consideration for the new Teaching and Learning department had to be providing services strategically and at scale. For example, we provide instruction for the introductory writing sequence. Each section of the intermediate course is **required** to have a library session. In winter 2017, 100 sections of the course were offered, with 54 of them requesting (and receiving) library sessions. This is 54% coverage of a class where we have committed to being able to serve 100% of the courses. While we can project being able to provide in-person instruction for an additional 10%, we are limited by staff and classroom capacity, so a revised model is necessary for any growth.

With this in mind, we devised a service model focused on four key areas:

- **Undergraduate Education:** Focusing on scaffolding information literacy across the curriculum, including via course-integrated synchronous and asynchronous instruction. We are particularly interested in working with gateway courses, capstone research courses, and research-related co-curricular programs (such as prestigious undergraduate fellowships and community-engaged learning programs).
- **Graduate Education:** Preparing graduate students to both conduct their own research and teach as faculty, via partnerships with TA training, graduate success programs, and academic departments.
- **Faculty Support:** Providing consultations for instructors on syllabus and research assignment design, aid in adopting and developing open educational resources (OERs), and creating

reusable tools that can be adopted by instructors for use in courses without mediation.

- **Assessment:** Developing local metrics for information literacy competencies, creating tools for evaluation across disciplines, and participating in assessment efforts relating to Western Association of Schools and Colleges (WASC) accreditation.

These four focus areas holistically approach the student experience across the undergraduate and graduate career, and acknowledge the mixed methods required for providing meaningful learning experiences at scale.

Core Competencies

Teaching librarians can bring their unique expertise and experience to bear in the university ecosystem by focusing on their strengths in information organization, research pedagogy, and evidence-based practice. A shared, core understanding of learner-centered pedagogy, inclusive practices, and instructional design principles provides a baseline for both leading instruction and consulting with faculty on ways to incorporate information literacy into their courses. While the whole team will focus on developing and deepening expertise in these areas, individual librarians will also consider best practices and disciplinary needs among the specific user population that they serve (for example, data information literacy in the social sciences).

Roles

For the initial launch of the Teaching and Learning team, five teaching librarian positions and a staff coordinator role were proposed. Three librarian positions focus on disciplinary areas, with the intention that these roles will support courses within undergraduate majors, and would develop additional skills for supporting students and instructors working within a specific disciplinary context. One librarian position focuses on the "early experience," working with learners who are new

to the university in some way. While the user population does include traditional first-year students, this role is also tasked with supporting transfer students and graduate students in their first quarter at UCR. The final librarian position focuses on supporting co-curricular initiatives, including prestigious undergraduate fellowships, University Honors, and community-engaged learning. The six roles are:

- Arts & Humanities Teaching Librarian
- Social Sciences Teaching Librarian
- STEM Teaching Librarian
- Early Experience Teaching Librarian
- University Programs Teaching Librarian
- Teaching and Learning Services Coordinator

In addition, we proposed an instructional design–focused position for a future recruitment.

All teaching librarians will be expected to have a baseline understanding of library resources and searching, working knowledge of at least one citation management tool relevant to their user population, and more in-depth knowledge of disciplinary resources relevant to their user groups. Additionally, they are responsible for demonstrated growth in the core competency areas mentioned above.

Training

Because all of the librarians and the staff member in the Teaching and Learning department have extensive experience with "bibliographic instruction" (our still-in-use term prior to the reorganization), professional development for the first year was based around the idea of building a teaching community of practice, reflecting on previous and current teaching experiences, and approaching new skill acquisition through a lens of appreciative inquiry, building on already-held values and approaches.

To facilitate the development of a local community of practice, the team meets once per week for 30 minutes and completes a round-robin structured around two questions: What is one achievement that you would like to share from this week? What is one challenge that you faced? This provides a space for the team to continually learn from one another, with most of the discussions sparked by this round-robin related to teaching and reference interactions.

In fall 2017, the department met twice monthly for a more structured professional development series, focused around the question, "What is learning?" Methods of engagement included discussion of pre-assigned articles, reflective exercises, and seminar-style discussion. These sessions had two outcomes: (1) to develop a sense of what professional development opportunities would be most helpful over the course of the next year, and (2) to strongly develop teacher-librarian professional identities.

In winter 2018, we continued these sessions, and added two more formal and time-intensive opportunities: a two-hour discussion of best practices in teaching, facilitated by a curriculum coach, and a full-day workshop on instructional design basics. At the end of winter 2018, we met again as a team to determine appropriate next steps for development.

Research Services Department
Director: Brianna Marshall

Services

The Research Services (RS) department was designed to provide support across the research life cycle, advising on areas including:

- **Planning and conducting research projects**, including finding information, providing guidance on project planning, working with digital tools, and staying organized

- **Working with data**, including sharing best practices for finding, collecting, describing, and analyzing data
- **Publishing and sharing research**, including facilitating long-term and open access to research outputs
- **Measuring and analyzing impact**, including support for identity management and research metrics

We envisioned that RS librarians would primarily focus on supporting graduate student and faculty research needs given that Teaching and Learning librarians would be working with undergraduates in an instructional setting. However, UCR has a high number of undergraduate students who are involved in research projects that would also benefit from the type of expertise offered by RS librarians. Ultimately, it was decided that support for undergraduate research lies in a gray area and doesn't fit neatly into either department, so both directors plan to work closely together to determine how best to support these needs.

> "A concerted effort was made to ensure that openness was highlighted as a departmental value. In practice, this means that RS librarians will prioritize facilitating open research..."

A concerted effort was made to ensure that openness was highlighted as a departmental value. In practice, this means that RS librarians will prioritize facilitating open research and, if possible, providing alternative solutions to closed platforms and processes. While it is not always possible (or desirable) for research outputs to be shared openly, the director felt this was an important value to have included from the earliest stage of development of the new department.

Core Competencies

We identified three areas where we felt it was critical for each librarian to have strong knowledge in order to respond to emerging research

needs. There are undoubtedly concepts that overlap in each of the following areas (particularly in terms of tools and platforms) but nevertheless these seemed like useful lenses for considering the skills needed to navigate the quickly changing research landscape. Ideally, librarians will be able to layer deeper functional expertise related to their roles on a solid foundation of knowledge in the areas outlined below.

The expectation for RS librarians would not necessarily be to gain an unreasonably deep expertise in the following areas, but rather to gain enough fluency with the concepts to have conversations with researchers about their work, positioning them to be able to recognize the challenges they face and learn how the library can meet their needs.

- **Information:** Understanding how information is managed, including personal information management, data management and sharing, basic data science concepts, and relevant tools and platforms for managing information
- **Workflows:** Understanding researcher workflows, including the research life cycle, differences and similarities in researcher workflows across disciplines, researcher pressures and constraints, grants and funding, and relevant tools and platforms related to research workflows
- **Projects:** Understanding best practices for project management, including methods and approaches, applications for academic research, reproducible research, communication and collaboration, and tools and platforms related to projects

Roles

Originally, five librarian roles and one paraprofessional role were proposed as follows. In our model, each librarian acts as the point person for a particular area of expertise, serving as a functional specialist. However, these boundaries are flexible and fluid to allow for team-based consultations and open sharing of knowledge across the

department.

The digital scholarship librarian takes the lead on digital project support, particularly for the digital humanities and social sciences. The open research librarian explores ways that the library can support open research and reproducibility, with an emphasis on supporting science, technology, engineering, and math disciplines. The data librarian provides expertise on research data management and data science, while the geospatial information librarian provides expertise on geospatial mapping tools and approaches. The maker services librarian acts as operations manager for the Creat'R Lab, a new makerspace in the UCR Library. Last, the Research Services assistant helps with general administrative and project support for the department.

This plan for librarian roles shifted slightly during the review process, when we opted to create a scholarly communication librarian position and proposed to hire the digital scholarship librarian at a later date. We felt that a scholarly communication librarian role focusing on support for scholarly publishing and impact would align more closely with librarians' existing skill sets and would allow us to recruit for the digital scholarship librarian, whose work would rely on an entirely new knowledge base.

Our final list of Research Services positions is as follows:

- Data Librarian
- Geospatial Information Librarian
- Open Research Librarian
- Maker Services Librarian
- Scholarly Communication Librarian
- Research Services Assistant

Given the small size of our team, RS librarians are expected to share responsibility for providing some services, including: general research skills (library databases and resources); information discovery services

(finding publications, data sets, etc.); literature review support; project management support; and information management consultations and tools (for example, citation management, lab notebook organization, and collaboration platforms).

RS librarians are expected to take a proactive approach to creating opportunities to develop and share their area of functional expertise. When asked how RS librarians might measure their impact, we shared that initial broad indicators of impact could include how librarians have developed further expertise, how many consultations or projects a librarian worked on with individuals or groups, and how a librarian has engaged with the UCR community through events, workshops, or other means. Defining what success looks like for our work will undoubtedly be an ongoing conversation within the department.

Training

To support shared understanding of the core competencies, training has been planned for the 2018 academic year. The first training opportunity will be in-house training sessions led by the director of Research Services. Additionally, three librarians will join the 2018 DLF eResearch Network[3] in order to engage in the library research support community of practice.

Collection Strategies Department
AUL for Collections and Scholarly Communications Strategies: Tiffany Moxham

Services

The primary goal of the Collection Strategies department is to develop data-driven collection management strategies and communication methods that best support our teaching, learning, and research communities.

In order to achieve this goal the primary services needed are:

- **Collection Assessment**: development and maintenance of focused, data-driven print and e-resource license, acquisition, and organization
- **Access Services**: rapid response to resource access requests in support of teaching, learning, and research
- **Stakeholder Engagement in Collections Activities**: internally, predominantly through proactive communication with the Teaching and Learning and Research Departments; externally, predominantly through faculty and staff/student collaborations
- **Strategic Planning**: knowledge and proactive planning regarding developing and changing local needs and national/international transformational collecting models

Core Competencies

- Expertise in best-practices around selection, acquisition, access, and discovery of resources
- Collection assessment skills
- Understanding of discipline area unique research, teaching, and format needs
- Proactive and reactive ability to adjust to initiatives, new pedagogies, and collecting models
- Communication skills; proactive communication skills with all stakeholders
- Building effective vendor relations
- Ability to navigate electronic resources troubleshooting
- Ability to effectively work with technologies such as integrated library management systems and platforms and statistics aggregators
- In addition, all collection strategists have at least one non-disciplinary related area of expertise around which they are expected to develop competencies.

Roles

Creating roles based around disciplinary areas assists with external communications, particularly with faculty. However, it was clear very quickly after the reorganization that it was necessary to codify certain duties as specific assignments to individuals not based around disciplinary areas. The sub-areas were added four months after the reorganization.

As part of the reorganization, Collection Strategies lost their paraprofessional and student support, requiring the need for librarians to take on additional roles. Additionally, while the previous subject-based collecting areas were reassigned under three disciplinary areas, overarching areas such as e-book maintenance and e-resource management areas were not initially re-assigned. Some of these needed areas are still under review.

As such, there is a short-term need for at least one additional team member to ensure both the ability to maintain core collection duties and in order to provide an increased level of assessment and the data-driven focus desired. This additional member would be required to focus a large amount of their time on developing visualization and assessment tools that could be utilized across disciplines and collections.

Our current list of roles (with sub-areas in parenthesis) is:

- Collection Strategist for STEM (E-resources lead)
- Collection Strategist for Social Sciences and Area Studies (Coordination of storage facilities and external shared print projects)
- Collections Strategist for Arts and Humanities (Transformational models lead)

Training

Immediately following the reorganization the Collection Strategies department went through a leadership transition, and therefore training was delayed until the spring quarter.

The initial round of training has focused on developing the e-resources and informational technology systems use by strategists who were not previously regularly and actively engaged in this area. The sessions are being led by the new STEM collection strategist, who was the previous electronic resources librarian, and are conducted in-house. The training sessions are broken down into one-hour sessions around various systems, technologies, or activity areas. The sessions are then followed up with active use of the system(s) and team collaborations to aid with learning the technologies.

The next team sessions will be based around reflective exercises and discussions of pre-assigned chapter, papers, and/or articles around the area of electronic resource management. Starting in fall, the aim is to begin more personalized training activities based on individual professional development areas. The intention is for these personalized training areas to incorporate outside engagement and collaborative activities.

Communication and Outreach

Our primary method of sharing out our internal organizational changes to the campus was via email to academic department chairs and faculty who are formal liaisons to the library. The text of the email is included in the Appendix. To our surprise, we received very little feedback from faculty (with the exception of a few departments with collections concerns). We also made significant updates to the UCR Library website to reflect the new structure. However, we anticipate that the majority of our departmental outreach will occur in fall 2018 (see the "Future Steps" section below).

Future Steps

- **Assessment**: In fall 2017, each department developed goals and strategic directions. In summer 2018, we will begin to evaluate the effectiveness of the new model, including surveying librarians in new roles, mapping accomplishments to goals, and developing baseline metrics for future assessment.
- **Departmental Outreach**: The first year of the new model has been focused on developing strategic goals for each unit and skill-building. Beginning in fall 2018, we will turn our attention increasingly outward, visiting individual academic departments and discussing new service models. We envision each visit will involve a cross-functional team, with representation from Teaching and Learning, Research Services, and Collection Strategies.
- **Reference Service Revision**: Following on the premise of the functional model that targeted services require targeted time and attention, we are currently working on a proposal to revamp our reference desk service into a student-staffed information desk model. Over 80% of the questions answered at our service points have been identified as directional, simple reference, or technology-related (for example, printer problems), and we believe a triage-style model, with well-trained students as the first point-of-contact for library users, will both free up staff time and provide a valuable learning experience for student workers.

Lessons Learned

We have several suggestions for institutions looking to undertake a similar process.

- **Develop a timeline.** We created a timeline early on, and shared the timeline with librarians in the affected departments for full transparency. We attribute much of the success we had in staying on track to this initial timeline document. Although

we made several adjustments in exact dates due to foreseen and unforeseen circumstances, we were able to successfully make the transition over a four-month period. Additionally, we initiated the reorganization over the summer, which benefited us given that we weren't vying for everyone's attention during the academic year.

- **Recognize that change is difficult and that people will react in different ways.** We experienced a variety of reactions from librarians affected by the reorganization, ranging from disappointment to excitement. Regardless of their overall attitude toward the new change, we anticipated that they might still feel anxious at one point or another. We did our best to be supportive and empathetic throughout the process.

- **Be collaborative and flexible.** If we hadn't been willing to adapt our initial approach to this process, we would have missed out on the opportunity to involve the Collections unit in the reorganization.

- **Provide something for affected librarians or other library colleagues to react to.** We found it difficult to prompt useful discussion without providing documentation or a written outline of ideas so we aimed to do so when possible, even when materials were still in draft form. This is beneficial in a few ways. It help minimize uncertainty about what leadership has in mind. It can also serve as an important catalyst for discussion and feedback.

- **Work proactively with Human Resources (HR) and/ or Labor Relations.** Depending on the organizational environment and HR policies and procedures, it is important to have early conversations with HR staff and labor relations (as appropriate). UCR has both librarians and staff in bargaining units, so there were specific protocols we needed to follow to revise job descriptions. In fact, we added some padding to the implementation timeline to accommodate the necessary discussions.

Conclusion

After only eight months post-implementation, and without a comprehensive or formal assessment, it is difficult to present a firm conclusion. However, at this early juncture we are overwhelmingly pleased with the effects of the reorganization on public services at UCR Library. Focused attention to specific areas of teaching and research services has produced measurable and impactful changes in current services, such as the revision of first-year instructional programs, and a robust maker services program. As the new departments continue to work and learn together, we anticipate being able to further deepen the library's impact on the campus community.

> " ...at this early juncture we are overwhelmingly pleased with the effects of the reorganization on public services at UCR Library. "

Appendix

Information Gathering: Outreach
Information Gathering: Services
Joint Department Retreat
Reflective Statement Questions
Outreach Email to Faculty

Information Gathering: Outreach

Format: This private survey allowed librarians to provide information about the outreach methods they employed in working with different departments. Survey questions are included below for your reference.

> Librarian name
> Enter the name of one department that you are the subject specialist for.
> How would you describe your relationship with this department?

Close, distant, somewhere in between?

Please pick the response that best represents your experience.

- I attend department meetings regularly
- I attend department meetings once a year
- I attend department meetings every few years
- I've never attended a department meeting

Please pick the response that best represents your experience.

- I participate in departmental projects regularly
- I participate in departmental projects once a year
- I participate in departmental projects every few years
- I have never participated in a departmental project

Please describe a few of the projects that you have participated in.

Are there specific faculty, graduate students, or program groups that you work with more closely?

How often do you receive requests related to collections from this department?

Have you participated in grant applications with this department?

What grants have you participated in?

How do you work with new faculty in this department?

How do you work with new courses in this department?

What is your favorite outreach activity that you participate in with this department?

Are there requests from faculty or students in this department (or ideas that you have for outreach) that you don't have time or resources for currently?

What are some unique ways that you support this department?

What else would you like to tell us about your outreach work with this department?

Are you the subject specialist for any other departments?

If answer is yes, survey questions are repeated for new department.

Information Gathering: Services

Format: A master document was shared on Google Drive and open

to both departments. Librarians signed up to fill in information for 2-3 service areas. After their first pass, all librarians were invited to fill in any additional information they might know about the services. Introductory text and questions are included below for your reference.

Answer the following questions as completely and accurately as possible for each service area, including any statistics that exist. You may need to consult with other librarians to get a complete picture of the service. If the service is not currently offered, write N/A.

To get started, simply click on the link to the service you've been asked to work on.

Research Services
Research Consultations by Appointment
Point of Need Reference and Research Assistance—Desk, Email, Chat, Text (Orbach Library)
Point of Need Reference and Research Assistance—Desk, Email, Chat, Text (Rivera Library)
Programming and Annual Events
Workshops
Collection Development
Creat'R Lab and Maker Boxes
Support for Patent Searching and Trademark Searching (USPTO)
Support for Geospatial Resources and Tools
Support for Grants / Research Funding Opportunities
Support for Author Publishing and Publishing Metrics
Support for Using Copyrighted or Licensed Materials
Support for Research Data Management and Visualization
Support for UC Curation Center (UC3) Tools (eScholarship, DASH, etc.)
Support for Digital Scholarship Projects (including Digital Humanities)
Support for Public Access Compliance (Federal Grants)
Support for Open Access Mandate Compliance (UC System)

Teaching and Learning Services

ENGL 1A-B-C

CHEM 1LA

BIO 5LA

Discipline-specific course-related instruction

Undergraduate grant program support instruction (MMUF, MSRIP)

Affordable Course Materials Initiative support

Tours

Education Services teaching and programming

Orientations

Grad student coffees

International student events

Course and research guides

Online learning objects

Learning Resources Display Center

Citation management

Support for campus programs (e.g., Honors)

Questions

What is the current service?

Is there documentation or a web presence for this service? Please list any relevant links.

Who are the target users?

What do we know about our current model (data, feedback, standing with national trends, etc.)?

What is the impact?

How do users interact with the service?

What do we know about users' assessment of these interactions and their experiences?

Where is the service delivered (include physical, virtual, geographical)?

What marketing and outreach is done to advertise the service?

How is the service staffed?

What are the access requirements for using the service (e.g., technology)?

What challenges do users have with the service (gap analysis)?
What are the complementary services, co-dependencies, and/or partnerships (internal and external)?
How is the service assessed/evaluated?
Who is responsible for the assessment?
*** How can this service be improved?
*** Is there anything else you'd like to share about this service?

Joint Departmental Retreat

Format: Early in our change process, we held a joint departmental retreat scheduled outside of the library building. Our goal was to learn more about the ideas librarians had for how the new departments could best meet user needs. The schedule that we followed is included below.

1-1:15: Overview of Retreat

1:15-2:15: Activity 1: Processing Exercise (Dani)

2:15-2:30: Break

2:30-3:30: Activity 2: Keep / Toss / Create (Brianna)
- Overview and count off in groups of 4
- First groupings: 15 minutes
- Second groupings: 15 minutes
- Report back and discussion: 30 minutes

Categories
- Keep—What should we keep doing since it works really well and serves a user need?
- Toss / Change—What should we toss or significantly change? What doesn't work well or no longer has impact?
- Create / Adapt—What do we need to create to meet the needs of

today and have greater impact on our users?

3:30-3:45: Break

3:45-4:30: Activity 3: Departmental Values (Dani/Brianna)
- Individual reflection: No more than 10 minutes
- Group discussion

Reflective Statement Questions

Format: This survey invited librarians to give information about their strengths, interests, and preferences. Survey text and questions are included below for your reference.

This survey will allow you to give information about your strengths, interests, and preferences.

The deadline for filling out the survey is **August 11, 2017** at noon. Please make sure you submit your survey by that date and time.

The survey will automatically save your responses which allows you to work on this over time-- as long as you have not clicked the submit button. To revise or add text, just return to the link you were sent in email. Click submit when you have finalized your responses.

Your responses will not be shared with departmental colleagues.

Q1. Your name:

Q2. Please describe the strengths, skills, abilities and expertise you have as a librarian or library staff member.

Q3. As a librarian or library staff member, are there areas of responsibility you are interested in growing into, or increasing your expertise in? Please describe.

Q4. Please indicate the roles or positions in which you have strong interest (you may indicate more than one).

Template Outreach Email to Faculty

Format: The following email was sent to faculty library liaisons to communicate our new structure.

Dear Professor <name>,

Over the last several months, the library has been engaged in a process to identify ways to most effectively meet the goals and objectives in the UCR Library Strategic plan to better provide teaching and research support, through our services and collections.

We are contacting department chairs and faculty who have been liaisons from departments to the library. Please pass this information on to your departmental colleagues.

The library is implementing a new organizational structure designed to provide more focus and in-depth support for all disciplines, for teaching and learning, for research, and for improving the library's collections. Librarians will work in three new units, and in new roles reflecting the new structure. Services to faculty and students provided by these units will include:

Teaching & Learning (led by Dani Brecher Cook, Director of Teaching and Learning)
- Facilitating course-related library instruction sessions
- Developing tools for teaching information literacy skills
- Providing consultations and support for research assignment design

Research Services (led by Brianna Marshall, Director of Research Services)

- Offering research and reference consultations
- Providing in-depth research support, including on data management, open access publication and copyright, and geospatial resources
- Managing and supporting programming for the Creat'R Lab makerspace in Orbach Library

Collection Strategies (led by Ann Frenkel, Deputy University Librarian)
- Enhancing the library's circulating collections in the arts and humanities, social sciences and area studies, and STEM disciplines
- Building research collections supporting UCR's distinctive contributions to research

Your primary contact for instructional sessions and services will be:
<insert librarian name, title, and contact information>

Your primary contact for library collections will be:
<insert librarian name, title, and contact information>

For research services, you may contact any of the librarians in the department.

If you are not sure where your question belongs, no matter who you contact, we will get your question to the most appropriate librarian to help you.

This is an ongoing process. We know that there will be adjustments and further refinements, and we look forward to constructive conversations regarding your experience with this new model of service and support over the coming months.

Warm regards,
Ann Frenkel, Deputy University Librarian

Endnotes

1. In late September 2017, former associate university librarian for collections and scholarly communication Alison Scott left UCR for UCLA, although she stayed through the first weeks of implementation. Assistant university librarian Tiffany Moxham started as of January 1, 2018. The project team consists of the authors of this case study and Alison Scott.

2. UCR Library, *UCR Library Strategic Plan*, developed academic year 2014–2015, revised for 2016–2017, accessed June 7, 2018, https://library.ucr.edu/sites/default/files/UCR%20Library%20Strategic%20Plan%202015-04-21.pdf.

3. Digital Library Federation, "DLF eResearch Network," accessed June 7, 2018, https://www.diglib.org/opportunities/e-research-network/.