




5-17-2013

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Recommended Citation

Somerville, M. M. (2013). A new way of thinking and working. *United Kingdom Serials Group (UKSG) eNews*, (296), <https://scholarlycommons.pacific.edu/libraries-articles/12>

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A new way of thinking and working

17 May 2013

Mary Somerville, University of Colorado at Denver

At a [UKSG 2013 conference breakout session](#), co-presented with Kristin Antelman, I offered observations on organisational readiness for web-scale discovery services adoption. Since then, I've had time to reflect on responses from audience members and conference attendees. So this invitation to contribute an editorial to UKSG eNews provides a welcome opportunity to again consider essential factors in my organisation's successful implementation of a discovery layer. Hopefully, these reflections will provide transferable insights for others.

At the Auraria Library in Denver, Colorado, USA, the process of discovery service adoption – from inception through customisation – was a response to the question: “What do we want to create together?” This query emerged following significant re-purposing, re-organising, and retooling within the organisation (Somerville & Farner, '[Appreciative Inquiry: A transformative approach for initiating shared leadership and organizational learning](#)'), in response to tumultuous and unrelenting changes within the scholarly community ecosystem (Somerville, Schader & Sack, '[Improving the discoverability of scholarly content in the Twenty-First Century: Collaboration opportunities for librarians, publishers, and vendors](#)'; Somerville & Conrad, '[Discoverability challenges and collaboration opportunities within the scholarly communications ecosystem](#)'). At the same time, numerous research studies were documenting the fact that the library website was no longer an integral part of many researchers' workflow. So we agreed to answer the question: “If Google can do it, why can't libraries?”

Additionally, perhaps unique to our history, a previous web-scale discovery service implementation had failed. The initiative had been siloed, and therefore lacked support from public and technical services staff members. So we chose to carefully design inclusive selection, implementation, and customisation processes that encouraged and sustained broad participation across the organisation throughout the 'discovery services lifecycle'. This philosophy was also aligned well with our new workplace values to 'lead from wherever you are in the organisation' and 'make decisions at the lowest appropriate level'.

From the outset, web-scale discovery service adoption reflected a new way of working that no longer depends on top down decision-making. In addition, our success has depended on evolving new ways of thinking which reflect changes in who we are, what we do, and the nature of the work to be done. As [Ken Page](#) phrased it in his plenary remarks at the UKSG conference,

establishment of priorities in contemporary workplaces requires analysis of ‘jobs-to-be-done’ (JTBD) through the lens of present and potential users who must accomplish a task, achieve a goal, or solve a problem.

It follows, then, that users do not want a ‘discovery service’; they need visibility, discoverability, and fulfilment pathways for academic content. In our case, because the majority of our 46,500 students are undergraduates, we choose to make our discovery service “the place to go for text, images, and video”, based on analysis of outcomes desired in research consultation and reference desk transactions. Therefore, the default collection for our single search box does not include specialised A&I services that provide abstracts without full text. However, it does include streaming video – a discovery service customisation produced by our vendor at our request, following our purchase of several thousand commercial films.

The active collection curation and interface customisation roles assumed by public and technical services libraries illustrate their new professional responsibilities as collaborative content developers and system designers. This has required and enabled revisiting relationships with primary and secondary publishers, intermediaries, and technology vendors. Necessarily, it has also required renegotiation of relationships among formerly ‘siloes’ colleagues in ‘bounded’ departments.

An enterprise level approach for working together to clarify ‘jobs-to-be-done’ (JTBD) has been fostered since 2008 through comprehensive re-invention of organisational structures, processes, services, and roles. Redesign purposefully acknowledged global migration from print to electronic scholarship and intentionally fostered workplace creativity, discovery, and exploration. In technical services, for instance, multiple functions have been combined and integrated within an ‘e-resources life cycle’ model that ensures a single streamlined workflow among acquisitions, e-resources, serials, and metadata management services.

To stimulate heightened collaboration across the organisation, we also intentionally enabled increased participation and shared leadership through a co-designed organisational communication, decision making, and strategic planning system. It was within this elaborated system of face-to-face reflection and dialogue, fortified by technology-enabled information sharing and knowledge management, that we reached agreement ‘from the ground up’ to thoughtfully adopt a web-scale discovery service. In learning from an earlier failed initiative, we have designed best practices for creating a nimble and responsive ‘[learning organisation](#)’ capable of supporting the discovery service lifecycle:

- **Shared vision:** We have developed common understandings and commitments to create a shared vision and mutual agreements on learning targets, improvement strategies, and aspirational goals. We recognised that traditional library website discovery strategies - an online public catalogue and A-Z database list - required reinvention. This has informed our shared decisions to invest fiscal and human resources in successful adoption of a robust discovery layer service.
- **Mental models:** Our beliefs, values, mind-sets, and assumptions determine the way we think and act. So we have had to reframe our collective thinking – which has influenced our service model – because the new discovery ‘paradigm’ requires a reorientation:

content in all formats is now available through a single search box. Sophisticated filtering, including publication type, is available within the search environment. In addition, formerly siloed consultation and instruction functions are now integrated into a holistic discovery and fulfilment environment through new database recommender, 'best bets', embedded chat, topical resource guides, and Ask a Librarian features.

- Personal mastery and team learning: New roles as content developers and systems designers have required extensive individual and group relearning and retooling. For instance, we have learned to inquire together with and for our constituencies served. New workplace practices include evidence based decision making, which now includes regular usability tests. Supervisors routinely engage in formal discussion of change management and shared leadership strategies and tactics. In 'thinking together,' we share our experience, insights, knowledge, reflections, and skills with the shared aim of learning with each other how to do things better. Overtime and with practice, this has served to refine our shared vision and common commitments through an action learning cycle that ensures continuous improvements.
- Systems thinking: This framework for seeing inter-relationships that animate complex situations and interactions has permitted us to discover the interconnections essential to successfully adopting a web-scale discovery service and realising its potential for re-positioning the library in researcher workflows. This shared lens has also encouraged and enabled discovery of new ways of taking initiative and working together across the organisation and beyond. For instance, we now more fully appreciate our unique contributions to 'the scholarly ecosystem' (or the scholarly 'value chain') that produces the peer reviewed content which fuels academic inquiry and knowledge creation.

The rich interplay between discovery service adoption requirements and organisational transformation process enhancements now continues to inspire (and require) new ways of working and thinking together. This synergy predicts the workplace resilience and nimble responsiveness needed to successfully navigate the uncertainties and opportunities ahead.