LUCIDEA

Don’t Just Be Integral: Be Aligned

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Introduction

Building on our prior years’ SLA Hot Topics sessions, *“Adapt, Act and Thrive”, “Building the Resilient Library”, “Doing More with More”, “What Does Success Look Like?”*, and the themes drawn out during last year’s equally successful session, *“Don’t Just be Integrated, Be Integral”*, at this year’s Special Libraries Association conference we sponsored the sixth in our discussion series on library sustainability, where we gave another call-to-action: *“Don’t Just Be Integral: Be Aligned!”*

The path to success and sustainability includes applying your tools and skills in support of the top-level mission and goals—and adapting the library’s services and deliverables so you’re always aligned with what’s most important to senior leadership. Our Hot Topics session focused on how special librarians can go beyond being integral to their clients’ daily workflow, and become (and remain) aligned with organizational imperatives.

Moderator Jean O’Grady and our panelists discussed fundamental questions, such as:

- Why is it important to be aligned with your organization’s mission?
- What are the benefits and value of being aligned—to the organization, to the library, to the individual?
- How can you speak the language of your organization’s leadership and why is that important?

Panelists Annette L. Demers (University of Windsor Paul Martin Law Library). Karen McQuillen (ETS), and Cindy Moon-Barna (CASE) covered topics such as prioritizing and delegating projects based on alignment, strategies for partnering with and leveraging other departments, and practicing alignment without guilt.

Program Take-Away

Attendees refreshed their understanding of the importance of being aligned with their organization’s mission, strategy and goals—and learned why that requires special librarians to see themselves differently, commit to continuous improvement, and prioritize activities, services and products based on alignment.

This whitepaper presents information shared during the event, combined with additional valuable insights gained from panelist interviews conducted in preparation for the discussion.

Presenters

This year’s participants in our panel *“Don’t Just be Integrated: Be Integral”* were:

Annette L. Demers—Law Librarian, Faculty of Law, University of Windsor

Karen McQuillen—Executive Director, R&D Library, ETS

Cindy Moon-Barna—Director, CASE Library

Moderator Jean O’Grady, Director, Research and Knowledge, with DLA Piper, facilitated the discussion—adding perspectives drawn from her own distinguished career in law libraries.

Organizations Represented

University of Windsor, Law School, Ontario, Canada

The University of Windsor is a comprehensive university across the river from Detroit. The Law School itself graduates around 700 law students. There are also 75 students in a dual JD program, which allows students to take law school for four years between the University of Windsor and the University of Detroit Mercy. And when they graduate at the end, they have two law degrees; one from Canada and one from the United States. Annette L. Demers reports directly to the dean of the law school, and her budget is independent of both the law school and the university library, which is quite a unique situation, and a good foundation. She stated that “our mission is always to support the teaching, learning and the research that goes in our law school”.

ETS (Educational Testing Service)

Educational Testing Service (ETS) is a corporation of about 3,000 full time employees. It is 72 years old, and located in Princeton, New Jersey. The main areas of work fall into research, assessment development, test administration, test scoring, and instructional products and services. Core brands include the GRE, which is the Graduate Record Examination, Praxis, TOEFL, which is Test of English as a Foreign Language. TOEIC, Test of English for International Communications, and HiSET, which is a high school equivalency test. The College Board, which owns the SAT, contracts with ETS to do test development, scoring and test administration. Per Karen McQuillen, “the R&D Library’s mission is to connect people with the information they need to do their work”.

CASE

The Council for Advancement and Support of Education supports institutions of higher education and independent schools worldwide, with all of their advancement activities— including fundraising, alumni relations, marketing, communications, and advancement services itself, which is the back of the house for fundraising activities. CASE puts on 75 in-person networking events a year, and they have 3,700 institutional members worldwide; that translates to 88,000 individual members. Per Cindy Moon-Barna, the library's mission is "fulfilling member requests and creating online content".

Insights and lessons learned

Why is it important to be aligned with your organization's mission?

Per Ms. Demers, "...from my perspective, alignment has ensured that I can use our very scarce resources as effectively as possible. "Her budget underwent 2.5% cuts for 12 years in a row—actually putting them at the same budget as they had in 1993. As opposed to other large university libraries that can buy big packages of content, her library buys only what is necessary for the professors in the Law School, for the research that's being done, and for the coursework being done. "That is how I contain spending, by strategically aligning with those user needs—even for cancellation decisions."

Further, Ms. Demers makes the point that "While many organizations have dealt with declining budgets by centralizing operations and investing in large consortial purchases, I personally think that both of those approaches actually move libraries further away from the principles of alignment. If we are not actively listening to, engaging with, and consulting with clients about our service offerings, then we are not aligned."

For ETS' Executive Director of the R&D Library, Karen McQuillen, it's important to understand that "if you're not aligned with the mission, you're not delivering what's important to the organization." Leadership has come up with the mission, focused on the most important needs; you have to make sure you are aligned with that work—even if/as the mission changes over time. "Alignment is context specific, too. You have to be aligned with user behaviors. If they want email, send them email. If they prefer face-to-face communication, don't use Yammer." The lesson here is that you really have to think about your user group. You have to align with the roles and personal preferences of the people that you work with, no matter what may be dictated by policy.

Ms. McQuillen also believes that you have to align with the mission and goals of the departments to which you report. In her 36 years at ETS, she and her department have reported to four different areas in the corporation, including Communication and Public Affairs, Strategic Workforce Solutions, Field Services, and now R&D. Each different department had goals and objectives Ms. McQuillen and her team had to align with. "The appreciation that I got from my leadership was such that they allowed me to do the things I wanted to do afterwards—because they saw what I was capable of, and how I could help others in the organization. So, in the end, alignment with each unit (even doing projects that weren't remotely associated with the library) really paid off."

Per Cindy Moon-Barna, Director of the CASE Library, CASE is currently in Year 3 of their 5-year Strategic Plan, and "there is simply no space for anything that isn't aligned with it". CASE has 4 Strategic Pillars: member engagement, talent management, thought leadership, and global impact. Says Moon-Barna, "When you're aligned, you're ensuring the survival of your department or unit within the organization. Alignment shows you are conscientious about the organization's larger goals."

Currently, Ms. Moon-Barna reports to the Vice President of Education directly, there's no one in between, which she says is great, because "it's kind of a short line to know what the leaders of the organization are thinking, and to make sure that what we do is aligned with what they want. If we plan to start a project, or we're thinking about a new content collection, and I can't show my manager how it clearly aligns with one of the 4 Pillars, we just move on to something else."

What are the benefits and value of being aligned—to the organization, to the library, to the individual?

Per Annette L. Demers, "From my perspective, information is the lifeblood of an organization. And so, whatever we can do to facilitate the work of University of Windsor Law School staff at all levels is going to help to make sure that we have a stronger voice in the organization itself."

"My number one example is our Associate Dean is always looking for the origins of a particular policy that we have on the books, and she can never find the answer, because it's buried in faculty council minutes from 1986. So, what we have done throughout the years is we've built a collection of faculty council materials, and in the past year, we've started creating a database to house those, and to tag them, so that we can quickly answer her questions. This is really supporting her work, making information readily available, at her disposal, so she can do a better job on her projects."

Ms. Demers believes that kind of proactive service makes the librarians real linchpins of the Law School, and it also makes sure that the library staff have a vision—that they know why they exist with the School. They are interacting with users; they are supporting the most important work of the institution. She notes, "That makes them feel that they're useful, that they have a purpose for coming to work every day. And I think that has really also helped with our employee engagement in addition to being aligned."

At ETS, the latest reorganization resulted in the library reporting to the R&D department, and being totally aligned with R&D. This meant cutting back on support to other areas of the company such as Finance or Strategic Development. Per Karen McQuillen, "At first I went into a bit of a funk. But in the end, I think it's really served us well, because we were serving R&D about 60-65% of the time anyway. And now that we are completely aligned with the group and really embedded, we have a real entree to their meetings where projects and strategies are discussed; they see what we're doing and where we're adding value, and we see what they're doing and what's important to them." In a move away from mostly virtual resources and services, the ETS R&D Library has moved back to a building where they're near their core users, and that has really helped to build relationships and access.

One example of a success story, resulting from understanding exactly what the assessment developers need, is that the library created a database to help track resources useful for writing test items, including published books and journal articles. Giving the test developers a way to track their work and their supporting content was a definite win.

At CASE, "alignment means survival". Says Ms. Moon-Barna, "Even with scarce resources, you should focus on the professional development of your staff. Despite having lots of turnover in the organization, librarians have been a constant, and for many content areas, we are the content experts. And that provides an opportunity for my team members to expand their knowledge in different areas, and to be seen as delivering services beyond traditional librarianship."

Per Moon-Barna, "Last year, we launched our Advancement Resource Catalogue to the entire membership; it was a huge achievement that we could share that content with all of our members, worldwide. We market it by saying 'The ARC is always open!'" It was also key strategically, because the launch of the catalogue was an element of the CEO's year-end performance review, and also a part of Ms. Moon-Barna's manager's review. So, when it was complete, it "gave the library huge credibility" as well as garnering 3,000 new users who benefit from the content the library continues to add. For the CASE library team, keeping aligned and staying focused on activities that support the four strategic pillars is critical.

How can you speak the language of your organization's leadership and why is that important?

Ms. O'Grady mentioned a classic stumbling block for special librarians: using library jargon. This often distances the library staff from their end users and from top management. At the University of Windsor Law School, speaking the "language of the organization's leadership" is less about the words, and more about understanding the ecosystem. According to Ms. Demers it is "really important to know the landscape leadership has to exist within. You need to ask questions such as 'where is their budget coming from?' 'What are the constraints they're operating within?' For example, a lot of our funding comes from the government, so there are very specific agreements campuses must adhere to."

Per Ms. Demers, "From the library's perspective, if you don't know what constraints your leadership is operating within, you don't know how to 'make an ask'; you don't know how to contextualize the ask, you don't know how to make the ask reasonable, and you don't know how to convince them that you truly understand what they're working with." Making sure you have that kind of credibility is critical.

Another strategy that has served Ms. Demers well is being proactive. "If I need something from a person in a senior leadership role, I don't just send an email and wait, and get frustrated waiting for a response. I do the research required to show that what I'm asking for is necessary, that it will be useful, and that it will make their work life easier. I do the assessment and the analysis, and I prepare a report. And then I put a package in front of them in a personalized manner, and say, 'here's what I'm proposing that we do. Everything that's here is ready to go. All you need to do is say yes'. And that really gets the 'yes' a lot faster than if they have to do the intellectual work themselves, because they do not have the time or the energy to figure it out. If you have it ready—ready to serve—you'll get a 'yes' a lot faster.

The other thing that I would say in general is, I have the luxury of being on a campus where I can sit on pretty much any committee, in the law school, in the university library system, or on the campus generally. And from my perspective, I make the decision about what committees to join based on two factors: what do I want to learn, and who do I want to know? And once I've fulfilled those two requirements, and made a constructive contribution to that committee, I will step away and look for new opportunities."

Ms. McQuillen stressed the importance of using the language of leadership when you're setting up your own goals and objectives, and reporting on them. At ETS, the top-level mission statement informs every department's goals and objectives. Sometimes, the library's "fit" for some of the goals and objectives may not be obvious. For example, "one of the goals is to disseminate information internally or externally about ETS' capabilities and its research. So how can the library fit in with that?" The R&D library supports that goal by running reports every six months on cited reference sources, mentions of ETS research in the news, and on social media. Further, they report details of projects done by the library, and always link it back up to the mission of R&D. Per Ms. McQuillen, "Our mission is to disseminate information, and I can prove we've done it. For example, we run a database called ETS ReSEARCHER and I can report on usage, in terms of numbers of visits, who's looking at ETS research, etc. The department reports to the group that does the external communication about ETS research, so in working with them, I've learned about what's important, what 'lingo' they use, and how to write things up to match their goals. That's working out pretty well!"

Ms. McQuillen has also discovered it's important to deliver regular reports on the entirety of the work done by the library, and for whom it's done. "One thing I was finding out was that we were doing a lot of work for people at lower levels within the company, and knowledge of that wasn't going back up to the VP. In fact, the VP would check in with my boss and say 'the library should be doing that' when actually we already were. Now, I make sure I provide biweekly reports that lay out each thing we do, so everyone can understand the contribution and the impact."

Per Cindy Moon Barna, "For librarians, it's always hard not to talk librarian. We do a lot of work within our organization regarding metadata, categorizing pages on the website, taxonomies. And you can just see the glaze going. So instead, we try to talk about content management, we talk about knowledge management, we talk about findability, we talk about search. So, we purposefully place ourselves in that space. For example, CASE is doing a project with data management, and my whole team is on the data management committee because it's what we do all day. And we're in charge of the taxonomy. And they basically just hand us a list of words and definitions, and we arrange it. And they're amazed that we do it.

As with ETS, in terms of connecting with my VP and our alignment, we do a monthly report covering metrics like how many searches have been run, how many requests we've done—the basic numbers that everybody pulls every month, and we include items such as requester location. As a membership organization, it's very important for us to retain existing members and gain new ones. So, within the organization, they use our library statistics as a point of engagement. Just as a university would track how their alumni are interacting with the university, we track how our members are engaging with CASE.

While we're not sharing exact questions, we can say 'this institution asked 25 questions of the library over the past year, and has this many users benefiting from the Advancement Research Catalogue'. Our membership team can see those statistics, and when it comes to member renewal time, let's say that institution says 'we don't really see much value in CASE, we're not going to renew our membership'. Our membership team can say, 'well, let me share a couple of numbers with you—you've been reaching out to the library, you've been attending conferences. You purchased books; you've been watching webinars. We think you're getting a lot.'"

The message here is that the library's activities at a macro level represent a key performance indicator for gauging member engagement across the organization, and also for how well CASE is doing building new groups they want to connect with.

How do you find out what's most important to senior leadership?

In order to get (and remain) aligned with organizational imperatives, library leaders need to know exactly what's important, especially as it changes. Annette Demers at the University of Windsor Law School, is a "big fan of structural reporting". For her that means sitting on the Academic Planning Committee, and the Faculty Council. She has been invited to sit in on Senior Leadership Team meetings. She is also on a Building Steering Committee, because the Law School building is undergoing a major renovation. In addition, she represents the Law School at the IT Advisory group, as well via the Learning Management System Advisory Board. Says Ms. Demers, "I'm going to get the information I need in order to make good decisions that move us forward largely by ensuring that I'm embedded as a part of our proper reporting structure. In my opinion, if those structures are weak or if they don't exist, I think that makes a library vulnerable."

Per Karen McQuillen at ETS, when the library first moved into the R&D department, she met with the senior leaders in the main R&D areas: Research, Assessment Development, Psychometrics, and Data Sciences. She interviewed them about their needs, and about where they thought the library could fit in and best support them. The conversations involved a bit of negotiating, because "they had some ideas about how we should help them, and while some of them really aligned with what I thought we should be doing, some of them didn't. Fortunately, I was able to show different ways we could help them that made better use of our skills, and they saw the value in that". Ms. McQuillen emphasized that they also discussed pain points, and as part of that she interviewed people from some subgroups, including those in the Policy Research Initiative Area, as well as the General Counsel's office. Understanding library clients' needs should reflect more than top-down. Per Ms. McQuillen, "After I did all those interviews, I wrote up a report, and delivered it to the Senior Vice President to communicate the library's strategy."

At CASE, regular meetings with the Vice President of Education, to whom the library reports, are key. Ms. Moon-Barna says they have a planning meeting every two weeks, and the VP talks about what's top of mind for him. One of those important initiatives is "an effort called the CASE Reporting Standard Management Guidelines, which has been a multi-year project. It reflects the gift reporting and accounting standards for fundraising. Working with 18 Chief Advancement Officers—many of whom manage billion-dollar campaigns—we are writing a global standard. These are people who are volunteering their time with CASE, and on behalf of the industry. So, making sure we're known to them and listening to their needs is critically important. The library is on the Data Management Team, and we have a librarian who meets with the Programs team every couple of weeks for updates and knowledge exchange. We also engage with the faculty through CASE's conferences, which is great because we interact with our members and get to understand more about what they need from us. Last but not least, we engage with CASE staff as much as possible; 20% of our requests come from staff working on projects or working with member communities."

How do you prioritize and delegate projects based on alignment?

Once you understand the organizational imperatives, those must be reflected in the library's workflow and short- or long-term projects. For Annette Demers, that means leveraging the insights she reaches through all her connectively with committees, boards, and councils to developing projects and priorities, which also reflect the ideas of other librarians and staff members. Says Ms. Demers, "With the Law School building renovation occurring, I keep a planner with all the details of projects that need to be done (and by whom) for the next eight months. As new things come online and we understand changing requirements, I will regularly sit down with the librarians and other relevant staff and reprioritize our work."

"We have three databases we're building right now, and that effort has a dual purpose. The databases are designed to help faculty with informational needs, and are built on a brand-new platform we've never worked with. I took one database, and assigned one each to two librarians. This was designed both to get the work done, and to teach us how to do it. We all walk away with a new skillset, and can move forward to build new databases as needed. Building skills as well as capacity is really important."

At ETS, where the library reports to R&D, per Ms. McQuillen, "It's pretty clear what we should prioritize, and that's R&D projects. And within the R&D unit, we're prioritizing Assessment Development, because that's where the most help is needed right now. In addition to research, ETS produces test questions. That's the widget. If you don't produce and update test questions, everything else kind of falls apart. So, in supporting Assessment Development, we are aligned with a key part of the company's mission that we weren't involved with before—and that's where our efforts have been focused for the last year."

It's interesting to note that if every department and every initiative is aligned with top level organizational imperatives, when the library supports any of those departments or initiatives, the library too will be aligned.

The number one priority at CASE is also very clear, according to Cindy Moon-Barna. "It's member requests, all the time, every time." She indicated that support from her Vice President is key to staying on track. "He will say, 'no, you're not creating new content this summer because you are short-staffed and member requests must take precedence'." That kind of support makes it easier for the library to shift priorities when they need to. And per Ms. Moon-Barna, "It's not like library projects are gone forever. We will be getting back to them. For instance, we finally started getting some new subject guide content and sample collections out there, which our conference faculty are very excited about."

What are some strategies for partnering with and leveraging other departments?

Ms. O'Grady commented that in her experience, teaming up with the IT department has been important, working with Marketing has been important, and partnering with Professional Development has been important. She asked the panelists with whom and how they team up with other functions in their organizations.

At the University of Windsor Law School, Ms. Demers definitely views the library as a strong partner for the IT department, for Finance, and for HR, often leading the way and setting the standard. For example, the library is currently building a database for the President of the University. Ms. Demers was asked to deliver a collection of campus-wide policies, which were previously undiscoverable through other means. The Steering Committee she works with involves Finance, HR, and other groups. She has to keep in touch with them, to train them, to let them know what the resources are, and to communicate regularly with the President, senior leaders, and team leads. Per Ms. Demers, "The thing I've needed to do a couple of times was to use my authority. For example, if I cannot get a satisfactory response from IT, I can say 'The President wants this done by August 31st if you don't mind', and suddenly they're paying attention. If I need to, I will do that."

AT ETS, partnering means sitting on the Research Publications Board and hearing about what their needs are as far as disseminating the company's research. The library helps them with tracking their work, monitoring usage of the TOEFL reading database, and finding areas where they can work in tandem with the assessment developers.

Says Ms. McQuillen, "I also look for opportunities to network with colleagues from other areas. 20 years ago, believe it or not, I played on the ETS intramural softball team. We were all young at the time. But the other people who are now in General Manager or Vice President roles played softball with me 20 years ago. So, we all kind of grew up in the organization together. And if they don't remember me from the library, they remember me from first base! Joking aside, they feel comfortable coming to me and talking with me because of that. I have a staff member who's part of a knitting club at work; that's another form of networking. You get to meet other people from other parts of the organization where you might not normally meet with them."

"Even though the ETS R&D library isn't so much of a company wide resource anymore, I still meet regularly with people from new product development and the strategy area, just to find out what they're doing and where we can partner with them—either on something new, or to point out what we already have in place that could help them. As an example, people from the strategy group were looking for information on ETS' patents. And I told them we're building a patent database. They were thinking they'd have to do it themselves, and here we already had it working. It's now integrated with their capability website. Partnership is about keeping an ear to the ground, seeing what the library has that can suit other department's needs, and making sure we make those connections."

At CASE, akin to the University of Windsor Law School Library, the librarians are on a lot of internal committees. They also deliver presentations to CASE's volunteer leadership groups, to the Commissioners, to the Board of Trustees, building awareness of their services and impact. In addition, they pull together reports and metrics for the Communications and Marketing teams and attend their "story planning" committee meetings where they can call out new resources collections or trending requests that will make great sidebars for specific stories.

Per Ms. Moon-Barna, "CASE is a small organization; we're on two floors of a building a couple of blocks from the White House, and I can just walk downstairs. Every once in a while, if I need a break, I'll just walk around and say hi to the people who are working with the website, or the IT department. And they know that if we can work on the website or an IT issue ourselves, we'll do it. We're one of the few departments that has editor access to the website. Because IT knows we do it right, we do the right tagging, we pay attention to detail; we know what we're doing. And that's a huge boon for us."

How do you practice alignment without guilt?

A focus on projects that align with senior leaders' priorities can mean that other important initiatives fall by the wayside. Ms. O'Grady asked the panelists how they stay the course and avoid falling prey to guilt about what doesn't get done.

Per Annette Demers, "My decision making is always governed by alignment ... but at the same time, I try to stay true to my personal value system. What that really means from my perspective is that in our work environment, I value a strong team, and that means I need a team. And actually, I'm going to say that I've never cut staff. The first decision I made when I was hired as the head of the library was to take on two roles; I was a reference librarian who became the head of the law library. And in that process, I dissolved the head librarian's budget line. And, by doing both jobs myself, what that did was prevent job losses for almost seven years for the front-line staff. And that was just to align with my own value system."

"Other than that, I've always done the best I can aligning the materials, budget, with our user needs. We do not need to buy everything. We do not need to have everything on the shelf. Interlibrary loans are a thing, we can do that. I have made strategic changes when I've needed to do that. Our technical services administrator retired a couple of years ago, and looking at our total staffing, I decided we needed more professionals and fewer in the clerical pool. So, I made the case to convert that budget line to another librarian position, because we have a lot more work that we need to do on the professional side. I would say that right now, my biggest guilt with alignment is that because we are moving the law school, and doing a full renovation of our building, I am literally throwing out a third of our print collection right now. And from my librarian document hoarder place that feels like I'm a bad librarian. But if I put on my alignment hat and I think, whatever the future of this law school is, as long as we are in the picture somewhere, doing what we need to do, it doesn't matter where the books are sitting. And we need to take focus away from the collections, and put it towards our services—which has always been the vision generally. In that way, alignment actually gives me peace of mind."

At ETS, a library move also required the loss of approximately a third of the print collection. Says Karen McQuillen, "I went through it with a colleague of mine. And we went through the books—thank goodness she put up with me, because I'd look at each book and I'd say, 'aww, this book. I remember when we got it—I got it for so and so.' And then I'd tell a story about this person and she would say, 'Karen, put it on the shelf; it's one we're getting rid of.' Without her around, I think I would have ended up keeping everything and trying to find spaces in people's offices around the organization. So, she helped me to alleviate that guilt."

Having decided *not* to feel guilty can be powerful. Says Ms. McQuillen, "Another thing I don't feel guilty about is teaching people how to search using Google, even though it still bothers me a little bit, but I know that's where they go first. I used to present a training session internally with the subtitle *How I learned to stop worrying and love Google*."

ETS took a decision to publish its research reports through Wiley, and "We just got a report from them, and they could show where the requests were coming through as well as the back links. And 47% of the research reports were coming from a Google search. They were hitting Wiley through a Google search. 15% were coming from Google Scholar. 62% of these were just coming from a Google base. I hate to say it, but it made me cry. Just 2.3% were coming from libraries and other institutions."

This spotlights the recurring theme "You have to know what your users are doing. Of course we have our internal databases; I have an ETS research database that has much better metadata. But if users are going to start with Google, you must make sure that your training and your learning is around that—and make sure they use it in the best possible way."

Continuing the theme of the loss of print collections; at CASE, they are getting ready for a move, and Cindy Moon-Barna is "convinced we will lose the majority of our stack space. So, I'm trying to pre-empt that by putting a lot of materials in local archive storage so I can get to it within a day if I need to. But the guilt never really goes away."

As with Ms. McQuillen's ETS experience, sharing the decision making about what has to go makes things easier. Says Ms. Moon-Barna, "Luckily, I have a Marie Kondo wannabe on our team. She just is ruthless in terms of getting rid of stuff. She'll sit next to me if we're trying to weed the print collection, and she'll just take the book. She won't even let me start the story, she's just going to take the book and we're going to move on. The bottom line is that most CASE library clients are virtual, so that's our primary focus."

Continuing the discussion of "alignment without guilt", Ms. O'Grady asked if any of the panelists have had to say "no" to projects, or set boundaries, and how they have done that without destroying their (and the library's) reputation.

Cindy Moon-Barna mentioned a basic, repetitive, yet important ongoing project that became burdensome, but instead of saying "no", they taught someone else within the organization to do it. She indicates that within the library they "shifted that work to focus more on trends in philanthropy, trends in our industry, backgrounds for media requests, talking points, that kind of a thing. For us, it's a win, because have ownership of the higher-level work".

As for other "no" answers, "I couch them all in terms of alignment. E.g., 'If you make me go to this conference for a week, that's a week I can't answer member questions, and member management is our number one priority.' That strategy has proven very effective."

At the University of Windsor Law Library, many "no" answers are about product purchase requests. For expensive content or requests that are outside the budget, Ms. Demers shares the entire purchase scenario and total price with faculty, and asks how many think it's justifiable. Again, shared decisions ease the way.

That's also the case at ETS. Says Ms. McQuillen, "We had to drop some corporate-wide database subscriptions and it was difficult to say that, but our budget was cut. The requesters can either pick it up with their own budget, or decide they really don't need it after all. It's rough, because I really want to make sure that if people ask me for something, I can provide it for them, and it's hard when that's not possible. But we have to go back to what our own mission is and stay focused."

Ms. O'Grady also introduced the topic of "a staff member going rogue" as a challenge that she sees with alignment. All the panelists have experienced this, in different ways. Ironically, librarians with incredible customer service orientations (e.g., staying late, working weekends, creating individualized newsletters) can unwittingly raise users' expectations beyond what can reasonably be achieved in the normal course of business. Librarians who support individuals by doing work the requesters can and should do be doing themselves (e.g., interlibrary loans, inputting requests) also create challenges—particularly if they leave the organization but the expectation of that level of service remains. Ms. O'Grady mentioned specific examples when librarians can get so deeply aligned with a practice group that "there's a sort of triangulation, where they are never available for general work; they're only available to be the star and work on special projects—and that affects morale within the library."

Additional Observations

Rounding off the session, our panelists shared their thoughts on ensuring that people understand all the different services offered by the library. Ms. O'Grady asked about different modalities, methods and technologies are being leveraged.

At ETS, "everything lives on the portal" and the library formally promotes that through newsletter stories and new hire orientations, and informally promotes it through hallway conversations or when requests come into the library. In addition to leveraging the website, the University of Windsor Law Library has a Communication Plan which specifies milestones such as when the training session messaging goes out each cycle, as well as who is responsible for those messages. At CASE, with 88,000 members and just three librarians, per Ms. Moon-Barna, they are "very careful about marketing" because a 10% uptick in their work would be unsustainable. Most of their promotion materials focus on their email subject guides and sample collections; what she calls "the online face of the library", which is mainly limited to members, and accessible via the website. They also do new hire orientations, and in cooperation with the Communications team, they highlight library successes in the weekly team newsletter.

Attendee Q & A

All of you have indicated that you are long term librarians within your institutions, and you have seen lots of leadership changes. How do you get yourself in front of your new leadership? And have you ever dropped the ball and had to recover from not immediately getting to that new leadership, to promote your services and the value of your library or information center?

ANNETTE DEMERS: "I try to get on the hiring committee for the Dean or the Associate Dean, because you meet them when they're ready to listen. I've also invited the new Dean of Law, to go out to lunch the first week on the ground. As you said, whatever you can do to get their attention as soon as possible is very important. If you wait too long, everybody else gets their opinions in ahead of you, which is sometimes detrimental. And when our new University Librarians started, I brought him on a tour and showed him what we were doing. But I also showed him this masterpiece document that I have which is our 'all stats', and it has all of my usage statistics, all of my desks, all of the budget, everything in one spreadsheet. Just to show him how organized we are, and to sort of try to build that respect. And we've had a fantastic relationship ever since."

JEAN O'GRADY: "Sometimes we have hiring staff who don't think Partners need 'the library.' But we do alerts, we do client customization, we do desktop customization, we do analytics. There are so many services a Partner needs that they would never know about—unless we have a foot in the door to introduce them. We are on the list where we see everybody who is joining the firm. If I can't do it personally, I'll have a local manager or librarian make sure to get in front of the person as soon as they join."

CINDY MOON BARNA: "When our current President joined CASE, there was an effort to create a great onboarding book for her, and given time pressures it never really happened. So, I just showed up and said, *'Hey, hi, I'm from the library. And if you have any questions about anything at CASE, feel free to ask.'* And to this day, when she walks by my office in the morning, she will still say, 'Oh, I have a question about this, or I have a question about that.' I think being involved in orientations, and even being on the hiring committee are really key. And walking around. Not only do you get to know the senior leaders, you know their support staff. Building those connections helps.'"

KAREN MCQUILLEN: "I come from a family of firemen and policemen, and I came up with something called the 'Librarian on the Beat.' So, the librarians would just go around, and meet up with people, and see what they were doing, say hi. Just so that they saw your face in the area."

JEAN O'GRADY: "I think figuring out the metric that will get that person's attention is critical. What is the number they will care about? Or what is the technology I can introduce that no one else in the organization is really positioned to introduce? Proactive curated monitoring of key clients, or something like that. I'm a big believer in metrics, and I try to figure out what metric a senior leader cares about. Whether you have saved money, whether you have brought in clients, whether you've had a positive impact on the bottom line, there's always something that people care about."

Do you have any tips about how to align in an organization that's essentially a virtual company? I work for a consulting group that is very like literally all over the planet, and I am the lone, solo information services person for them. And I at times feel as though I am behind the 8 ball, that I'm being only reactive rather than proactive. Because I'm not embedded in any sort of like project management, or planning role. And I wondered if you had any hints or tips in how to align in an organization such as mine.

CINDY MOON BARNA: "Does your organization have an online community? At CASE we have topical communities, and conference communities, and volunteer leadership communities. It's a really easy way to interject ourselves."

ANNETTE DEMERS AND JEAN O'GRADY: "How do they articulate their priorities? Perhaps you can come up with some sort of a plan, aligned to their highest priorities. Meet the highest priority first, and then use that as justification for getting addition staff, or interns, or new technology. Maybe you could make a list of the kinds of services you could provide, if you had their attention and support. And it might mean some money, it might mean some technological support. But I think you need to sit down and have a conversation with somebody in senior leadership, explaining the kinds of services and the value you could bring to the organization, if they would just pay attention. Have them articulate the scope of the work, and help you prioritize the project side. Because if you are currently trying to serve all of their needs as just one person, I think you need some clear direction on their priorities."

Conclusion

The information and insights shared during this session were extremely rich, and in fact generated as many great new questions and possibilities as were answered and discussed. In conclusion, Ms. O'Grady said, "We're information professionals, and you know what? Our colleagues are our best source of ideas. I have been in this profession 30 years; I grew up asking other people how to solve problems, and I continue to ask other people to help me solve problems. I think we'll always find the answers in each other."

How will you implement what you've learned about the importance of being aligned with your organization's mission, strategy and goals? No matter what your sector, budget, or library staff size, you can prioritize activities, services and products based on alignment.

"One of the great things about what has happened in the past 30 years is that the digital revolution has enabled me to reinvent my job, and what I deliver in my organizations—and I've been in several organizations over those 30 years. It is possible to stand still and die, but I don't advise it. I believe there are always opportunities." – ***Jean O'Grady, DLA Piper***

About Lucidea

Lucidea is a knowledge management software and solutions company that provides the infrastructure and business process know–how to help information intensive organizations easily collect, organize, and leverage their corporate knowledge. Our products improve accessibility and use of information assets for the people who need this knowledge most – employees and customers – resulting in higher employee productivity, lower operational costs and increased customer satisfaction. With a global customer base of more than 2,300 active clients in more than 50 countries, Lucidea is the largest provider of knowledge management solutions to corporations, law firms, non–profits, government agencies, museums, and archives worldwide.

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