

# Don't Just Be Integrated: Be Integral

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## Introduction

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

Our panelists focused on how special librarians can go beyond integration with organizational imperatives—and become integral to organizational success.

You know that the path to success includes doing more with the tools you have, and the skills you've built. For many libraries and librarians, "doing more" means becoming "embedded"—and evolving beyond delivering subject matter expertise to becoming a truly critical organizational resource.

During this year's Hot Topics session, moderator Stephen Abram and our panelists discussed fundamental questions, such as:

- What are the characteristics of an embedded librarian?
- What are the benefits and value of being embedded—to the organization, to the library, to the individual?
- How can you communicate the value of being embedded to leaders and stakeholders?
- How do you emulate an embedment strategy when you have fewer resources?
- What are the pitfalls of an embedment strategy, and how can you address them?

Panelists Karen Botkin (Verizon Law Library), Samantha Bouwers (ACT) and Jean O'Grady (DLA Piper), covered topics such as alignment with the strategic objectives of stakeholders; metrics and measurement (quantitative and qualitative) that validate an embedment strategy, marketing and reputation-building, securing advocacy, and risk mitigation.

### Program Take-Away

Attendees refreshed their understanding of the importance of being integral to the organization—and heard why that requires special libraries to adopt (or partially emulate) a strategy that

includes embedded librarians. They heard practical advice on developing an embedment strategy, learned techniques for communicating value to senior management, and got tips on how to secure advocacy and budgetary support.

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

## Presenters

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This year's participants in our panel "Don't Just be Integrated: Be Integral" were:

### KAREN BOTKIN

Law Librarian,  
Verizon

### SAMANTHA BOUWERS

Librarian, Information Resource Center,  
ACT

### JEAN O'GRADY

Sr. Director of Research & Knowledge Services,  
DLA Piper US, LLP

Moderator Stephen Abram, CEO, Lighthouse Consulting, facilitated the discussion—adding perspectives drawn from his own distinguished career as a special librarian and consultant to the information sector.

## Organizations Represented

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### ACT

ACT is a mission-driven, nonprofit organization dedicated to helping people achieve education and workplace success. ACT is trusted as a leader in college and career readiness, providing high-quality assessments grounded in nearly 60 years of research. ACT offers a uniquely integrated set of solutions designed to provide personalized insights that help individuals succeed from elementary school through career.

### DLA PIPER, US, LLP

DLA Piper is a global law firm with ~4,200 lawyers located in more than 40 countries throughout the Americas, Europe, the Middle East, Africa and Asia Pacific; their US division has 25 offices.

### VERIZON

Verizon is an American-based multinational telecommunications

conglomerate with many divisions, including Public Policy, Law & Security. It is one of the largest communication technology companies in the world, connecting millions of people, companies and communities, with \$126B in annual revenue and ~155K employees.

## Insights and lessons learned

To begin the session, each of our speakers addressed what they see as the most important traits a librarian can bring to their “flavor” of embedded librarianship. As noted by facilitator Stephen Abram, it’s important to ask “What do we mean by embedded librarianship?” because it’s on a spectrum; there is no one definition—but there are common characteristics.

### What are the Characteristics of an Embedded Librarian?

Per Samantha Bouwers, “When I was hired at ACT, I was hired to catalogue archives. Then one of the research department heads approached my manager at the time and said, ‘Hey, could we have half of your time for the next two years?’ and my manager said, ‘No, but here is this recent library school grad who would probably be fantastic,’—so that’s how I was able to step into a full-time role, which was to be half time in the information resource center, and half time embedded in one of the research departments on a long-term project.

For me, when I think about the characteristics of an embedded librarian, one of the very first things that comes to mind is **flexibility**. Most days you have a to-do list in your head while you drive to the office, and then you walk in the door and everything is blown up in your face. At least, in my experience with some of these different projects I’ve been embedded on, it’s not the same day-in and day-out, because you’re working so closely with your stakeholders and you’re so in-tune with what they need, that by the time the day ends, you’ve done everything except what you had on your list in the morning. ‘Flexibility’ was the very first word that came to my mind when I thought about the important elements of embedded librarianship.”

Karen Botkin is a solo librarian who supports 400 lawyers at Verizon. Per Ms. Botkin, she uses her request management skills to **categorize and compartmentalize** the reference questions she receives, and to start **teaching people to do things on their own**. “...my company is very big into self-

service; I’ve found that I can teach very well one-on-one and in an open environment. Sometimes you get people listening in, so I get an extra added benefit – I’m teaching two-on-one or three-on-one, and that works out well, too.”

Jean O’Grady is responsible for the Research and Knowledge Services division at one of the largest and most geographically distributed law firms in the world; DLA Piper came into being via a number of mergers, and she came on board during a reorganization. Per Ms. O’Grady, one of the first things she said to the library staff was, “...this is just not an efficient organization; we’re not meeting the needs of the lawyers. Running a library is so very clerically intensive, but in order to ratchet up the kind of work we do and **focus on** the lawyers, their clients and their **business needs**, we have to completely transform the organization.’ We centralized all the back-office work, we digitized, and we built digital libraries. It didn’t happen overnight. One of the consequences of going through this massive reorganization was that the **local managers and local librarians became available for alignment** – that’s the bottom line. Because people didn’t have to shelf books, and code invoices, and label books, because all that had been centralized in a technical operations place—people were now ready to take on embedding and alignment with practice groups, do curated newsletters, attend practice group meetings—just get much more deeply involved in the daily professional lives of the lawyers and the clients.”

### What are the Benefits and Value of Being Embedded?

Being embedded within your organization—and being integral to its success—brings benefits not only for the company/firm/nonprofit, but for the department and the individual library practitioners. It’s important to be clear on what those benefits are and to let them guide you as you develop new strategies, products and services.

Per Jean O’Grady, a major benefit for librarians is that “**You get new skills**. For example, we had each of the researchers learn how to curate custom newsletters on specific clients and industries. The act of curating these gave each librarian deeper expertise on clients and industries, and the legal and regulatory issues impacting them.” She mentioned that a key issue is “learning the terms of art” and keeping up with changes in the sector or industry.

Extrapolated by Stephen Abram, for the organization, “The **value is in value-added services and value-added alignment.**”

For example, Karen Botkin brings a business background to her role working with lawyers, and is therefore “searching from two different angles.” She brings that perspective and related research tools to new lawyers who understand the law but don’t understand how Verizon’s various businesses may be impacted. Abram noted that “[Special librarians] can bring that important kind of learning to less tenured staff...they need that coaching, and we tend to be the non-threatening way to learn...we’re not affecting their performance review, we’re not affecting their ‘up or out’ in a law firm...we offer a **safe place to ask questions.**”

For ACT, per Samantha Bouwers, “The ultimate value to the organization is getting **higher quality research.** Because I’m able to do a solid literature review, or because I’m keeping my ear to the ground on whatever the topic might be—ultimately, a higher-quality product is produced.

I’d say on an individual level, I would encourage anybody who’s thinking of an embedded strategy not to worry if you’re not a subject matter expert. You went to library school, and the benefit to you is going to be that you can jump in and really hit the ground running because of **your skills as a librarian**”. Bringing a **fresh perspective** to a problem helps library clients think of different ways to talk about and approach it.

All the panelists agreed that **making library clients look better and smarter** is the “bottom line.” Per Ms. Botkin, “I make suggestions for publications they can monitor on their own... after a while, they begin to sound like experts.” Ms. Bouwers “catches all the new hires” and advises them on trade publications to be watching, and tells them about relevant research available. Per Mr. Abram, “When you’re embedded, you save so many people a lot of time, because you’re the fastest route to solving your clients’ problems.”

Part of being the fastest route to problem solving includes **leveraging synergies** and **curation**. Resources used in two or three different projects can be quickly put together as the answer for a brand-new project, for example, or per Mr. Abram, packaged into a “**personal learning strategy**” for a library client: “Here are just a couple of articles a day, and a couple of key reports and journals you should keep up with...” As Ms. Botkin mentioned, you can then use those curated materials

to assist the next person coming in with similar needs without reinventing the wheel.

## How Can You Communicate the Value of Being Embedded?

Marketing your special library is an ongoing challenge; not only must you deliver products and services that ensure you’re integral to your organization’s continued success and viability, you have to ensure that your clients, leaders and other stakeholders know about your impact—and most importantly, can see and measure the value.

Our panelists agreed with Jean O’Grady, who asserted, “It’s just endless. You **don’t pick just one [communication] strategy.** You have to be constantly visible.” At DLA Piper, the Research & Knowledge Services department produces Annual Reports that allow firm leaders to see how practice groups are supported, for example, with aligned librarians working alongside practice heads to help them understand which resources are used, which should be replaced, and how their research expenditures are adding value.

Another way of communicating bottom line value is working closely with the Marketing team, tracking client acquisition and revenue. Per Ms. O’Grady, “...we follow the development of a client over time, and we can quantify and say ‘During the first six months after that client was acquired, it brought in 2 million dollars ... we generate reports that tie our department’s work directly to **revenue, savings, and return on investment.**”

Per Ms. Bouwers, “You have quantitative and you have qualitative data, but what I would say is: **Contextualize the quantitative data.** If I just say: “I pulled together 300 resources” what does that really mean? For us it’s critical to contextualize it, especially at this point, because [where the library reports] has been bounced around a lot in the five years that I’ve been there, and we have to educate management.”

She continued, “You contextualize your **quantitative data**, but qualitative data is really what is going to win over senior leadership when you have one sound bite of somebody saying, ‘Literally, without the library, this would have taken an extra six months to do.’ That’s not quantitative exactly, but at the same time it’s very powerful. You want to keep those qualitative nuggets when you can get them, and share them out however

you can; like smoke signals, or newsletters, or big banners that you can print and hang in your library.”

The other panelists agreed on the need to develop quantitative measures in addition to “stories”. Per Jean O’Grady, “We’re always asking ‘how can we quantify that? How can we turn that into a number?’”

After you’ve quantified and contextualized, one way to communicate value is with **strategically placed infographics**, per Karen Botkin. She partnered with someone in Verizon’s communications department who designed visuals for Ms. Botkin to post on bulletin boards in the Legal Department, presenting statistics on database usage, reference questions, CLE courses, etc.

Stephen Abram mentioned that one of the most interesting things he has been working on is building **dashboards, with integrated data and assumptions**, saying: “Okay, a book costs this much. An interlibrary loan costs this much, etc.” Some of this is really basic stuff, but when you add it up and can say: “Okay, we did 1,000 interlibrary loans,” that’s a \$200,000 benefit in cost avoidance. And it wasn’t just interlibrary loan; it was the identification, the delivery, the alignment in a timely fashion. Dashboards can instantly generate infographics that we can instantly turn into visuals—for inclusion in, let’s say, a departmental annual report!

Per Samantha Bouwers, “**We also build narratives about money saved**. “This is the average cost per periodical. We subscribe to a couple hundred. This is the average number of departments a specific periodical circulates to. If subscriptions weren’t centralized, there might be four departments who subscribe, and each pays \$1,700—that’s a lot of money.” Then we can begin to say: “This, quantitatively, is how much money the library saves you.”

Per Mr. Abram, “That’s a raw economic return on investment. Then there’s the **social return on investment**. You sit there and say: “What is the value of the learning the library delivers?” The only way to adapt text and resources we provide is knowing what needs to be learned by an individual at the other end. They have to read that case, they have to read that article on the latest stats, and learn the terms of art for their sector.”

At DLA Piper, Ms. O’Grady’s team created “widgets” that pass users through to exactly what they need. “Find a case. Find an SEC filing. Find a legal definition. Find a patent.” Periodically, she quantifies widget value. “If those get clicked on a million times a year... and they do get very heavily used because it’s the low-hanging fruit—it’s document retrieval, but we’ve eliminated client numbers and passwords. Users don’t need to know what resource it is. They just go directly and get the thing that they need. If you quantify those million clicks per year, say it’s each lawyer times five minutes—five minutes divided into \$500 an hour—that’s a very substantial **efficiency delivery**.” And by the way, I took that data and I said “You’re not sure that we’re efficient? We would need a hundred people to deliver the value we deliver with this solution.”

Verizon’s Karen Botkin shared that she looked at some basic statistics from PLI (Practising Law Institute), noticing that many attorneys go into Manhattan to take a Continuing Legal Education (CLE) class, which means time away from the office, it means parking, it means travel—all of which gets billed back to the company. I said, ‘Let’s have the class here’, and all it cost me was a box of candy bars to get them to walk in the door.

## How Do You Emulate an Embedment Strategy?

It’s easy to believe that you can’t actualize an embedment strategy when you have limited resources—money, time, headcount—but our panelists believe that even as a solo it’s possible to deliver many elements of embedded or aligned librarianship.

Getting out of the library and walking around is certainly an element of aligned or embedded librarianship, but sometimes you don’t have to go that far. Ms. Botkin considers herself embedded in part because she sits with the entire legal team at Verizon headquarters. Every day she runs into everyone, and can tell what they’re working on and what they need by talking to them over the coffee machine or by saying hello in the hallway, or by what they’re carrying or what they have up on their screens as she walks past. “Nothing is sacred—there’s no privacy whatsoever, and I’m not above butting my nose in where it probably doesn’t belong, and saying, ‘You know, there’s something that could help you with that’, and that’s how they get my services, whether they want them or not. My favorite tool is **eavesdropping**.”

Ms. Bouwers is a solo librarian as well, and one of her strategies is to remain engaged with a project even when it's over, **reusing** what she has learned and resources she has found. "I have been embedded on market research teams, and I've been embedded on different research teams. I never shut down an alert, basically. If I was on a project and I'm off that project now, I just keep all the news alerts and the research alerts going, and then when I find something awesome, I think, 'Oh, Edgar needs to see that', or 'I need to send that one to my CI team'. You earn a lot of brownie points that way and it costs you very little time. I actually just sent something off to my product development folks, and they said 'This is exactly what we needed before our senior leadership team meeting happening at 10 o'clock today'. That cost me nothing but four minutes and reading an HBR alert or something."

Per Stephen Abram, with librarians as with lawyers and other professionals, "Clients aren't 'paying for the hour'—they're paying for all the depth. Sometimes special librarians need to remember that we have that depth, too." Karen Botkin agreed, saying "It's all about the end result of our expertise and experience; I'm scanning periodicals and research reports constantly and I'm reminded of past projects that trigger me to know that someone can still use that content—so I **summarize** it in a line or two and ship it out to help make my clients smarter. Recently a woman came back from three months out of the office and I gave her one page on what she missed while she was out, and she was up to speed."

Jean O'Grady believes that if you're under-resourced, being aligned or embedded means being very selective and **choosing highly strategic things to work on**. For DLA Piper, this meant starting a Competitive Intelligence program, supplementing an activity performed outside the library in a different department with valuable tools and resources already available in the library. One of the high impact things Ms. O'Grady did was start a newsletter for the firm's executives, on the state of the legal industry. So every morning, the managing partners get a customized newsletter about what's going on in large law, what's happening with big clients, what's going on in the economy and which other law firms are succeeding or in trouble. While this was initially controversial, it took off. "Now, everybody wants to be on the list to get this newsletter." Interestingly, when the head of Competitive Intelligence retired, it was a given that the function and staff would move to the library because they'd

demonstrated skills and talent and interest—so it resulted in increased capacity over time. "There is nothing wrong with **opportunistic** strategies."

For Samantha Bouwers, part of being embedded as a solo is **being realistic** about what you can get done and when, and what you're not going to get done. "If one of my key researchers comes to me with a need, I accept that, yes, 'This pile of books may not get catalogued today'. You're balancing operational work with needs of your larger team, but as we've been talking about, that's really where the value is and it's going to be a huge part of librarianship going forward. Priorities, deadlines, and all of that are fluid."

## **What are the Pitfalls of Being Embedded, and How Can You Address Them?**

Certainly one of the pitfalls of being embedded is having your priorities hijacked. Stephen Abram asked the panelists to discuss other challenges that make it difficult to be embedded.

A common issue is that of **attrition**. Per Ms. O'Grady, one of her biggest disappointments was losing a library staff member when the practice she'd been supporting left the firm as a group, taking the librarian with them—and offering her a job as practice manager. As a manager or director, it's important to **ensure that embedded librarians feel connected to their larger cohort**, and supported by departmental management. "You have to keep them continually engaged, even if that's through virtual meetings, where people report on what they're doing for their embedded group. That way, they exchange ideas on products they're developing, services they're providing, get ideas from each other—and begin to understand each other's expertise in the context of the department."

Another challenge is that of people with certain personalities using their alignment with a group, department or practice to avoid work. Commonly, librarians are tasked with doing embedded work, but are also supposed to be available to help the rest of the team and take generalist questions as needed. Managers should ensure they have staff with the integrity not to "triangulate" like that; otherwise that type of avoidance or **entitlement** can be toxic for the group.

Verizon's Karen Botkin described a challenge specific to solo librarians: although embedded with the company's lawyers, she no longer works with a large group of peers who could

brainstorm when she got stuck on something. “I would stand up and turn around, and say: ‘I need a hint in the right direction. I’m looking for X, Y, and Z,’ and someone from the back of the room would pipe up with a suggestion. I don’t have that now. I have to go back to the specialist for whom I’m doing the work, and play the reference question game again, and hopefully get some other kind of hint as to where they’re going with it. **Exposing ignorance** is going to happen, whatever—but I’d rather do that in front of my colleagues, so I do consider that a pitfall of being embedded.”

Per Samantha Bouwers, **competing priorities** are a pitfall. “Being one foot in the library and one foot in the research department, if a whole bunch of operational tasks or a bunch of generalist questions were percolating in the library side of things, and yet, I have these really pressing needs from my researcher, what call do I make?” Asking the library manager and the research manager to meet and negotiate the priorities is a solid fallback strategy when all else fails.

Another challenge Ms. Bouwers highlighted is **collection development** related. “When you have library staff embedded in an area, the library staff is really tuned in—for better or worse—to resources. They know exactly what journals you need to read or buy, and the books you need to be reading or buying, or which databases you should subscribe to. When I’ve been on a project, I see myself buying just a ton of content in that one area, and then I feel bad about the other people who don’t have aligned librarians, because they’re not getting that level of collection support.”

## Shared Observations

Rounding off the session, our panelists shared their thoughts on delivering “high touch” and aligned services and products to an **increasingly distributed and virtual client base**. Even when you locate embedded librarians with their team, such as the Intellectual Property practice at DLA Piper, which is on the West Coast of the U.S. (because that’s where the entertainment industry is), how do you support the IP lawyers all across the country? Per Stephen Abram, “When you’re not cohabiting with your user base and you can’t do reference by walking around, how do you address that?”

This is where **technology** does come to the rescue, with Skype meetings, for example, and even telepresence get-togethers if your parent organization has those resources. You can leverage communications technology for more than meetings, embedding it into your workflow, e.g., using Skype to do a reference interview.

Jean O’Grady mentioned the opportunity to get together at conferences like SLA, for mini-retreats—and of course, if you work for a multinational organization, you can attend and leverage meetings expressly designed to bring staff from all geographies into the same room. “It’s the nature of the virtual workplace today—you just have to **work harder at developing relationships**.”

Karen Botkin noted that **leveraging time zones** and distance can sometimes work really well. “I’ll do a project for someone in Dublin, and I’ll send it at the end of my day, and they have several hours to digest the information and perhaps figure out what’s still missing, and I find a thoughtful response waiting for me in my mailbox the next morning.”

ACT’s Bouwers explained, “I try to catch as many **new hires** as I can during their first week; I say: ‘Listen, I know your brain is scrambled eggs right now’, but we hand out bookmarks which everyone loves, with our email address in big letters on it, and I say: ‘I’m going to email you some stuff I think you need to read. Let’s talk when your brain is reassembled and you know what your job is.’ Even just that **one face-to-face meeting** improves my communication with that researcher down the road.”

## Conclusion

Embedded (or aligned) librarianship means different things depending on the organization, size of staff, budgetary resources, etc. The experience of our panelists demonstrates many commonalities, though, and all acknowledge the **organizational and personal value of tighter linkages to library clients**—and the need to **measure and market the value of alignment**. What can you do to become and remain integral to your organization?

“The song of embedded librarianship  
is making yourself indispensable”

**Samantha Bouwers, ACT**

## 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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