

# Embracing Change

Mapping New  
Workflows in Times of  
Transition

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# Introduction



The Pollak library has a robust instruction program offering an average of more than **700** instruction sessions annually.

**21** library faculty members  
(**15** instruction librarians)



## **California State University Fullerton:**

43,662 Students  
4,258 Faculty & Staff

110 degree programs  
(55 undergraduate / 55 graduate)

HSI / AANAPISI Recognized Institution

32% First Generation Students  
57% Underrepresented Students



# Shared Experiences

In the last 3 years, have you experienced a change in or lack of leadership?



# Shared Experiences

In the last 3 years, have you had  
a new person join your team?



# Shared Experiences

In the last 3 years, have you taken on more duties due to the changes?





# The Perfect Storm

- Without an AD for over a year
- Interim Dean of the Library, Interim Provost, and Interim President
- Both cataloging assistants retired
- New cataloging assistants, new AD, and new Dean within months
- Cataloging Librarian went on a year-long sabbatical
- Planned to onboard Rialto during his sabbatical

# Radical Acceptance

In Dialectical Behavior Therapy (DBT), radical acceptance is a core skill that involves fully embracing the reality of a situation, even when it's painful or difficult, without resistance or judgement.

It's about accepting what is, rather than clinging to how you wish things were.

# Applying Radical Acceptance



Anticipate &  
Accept Change



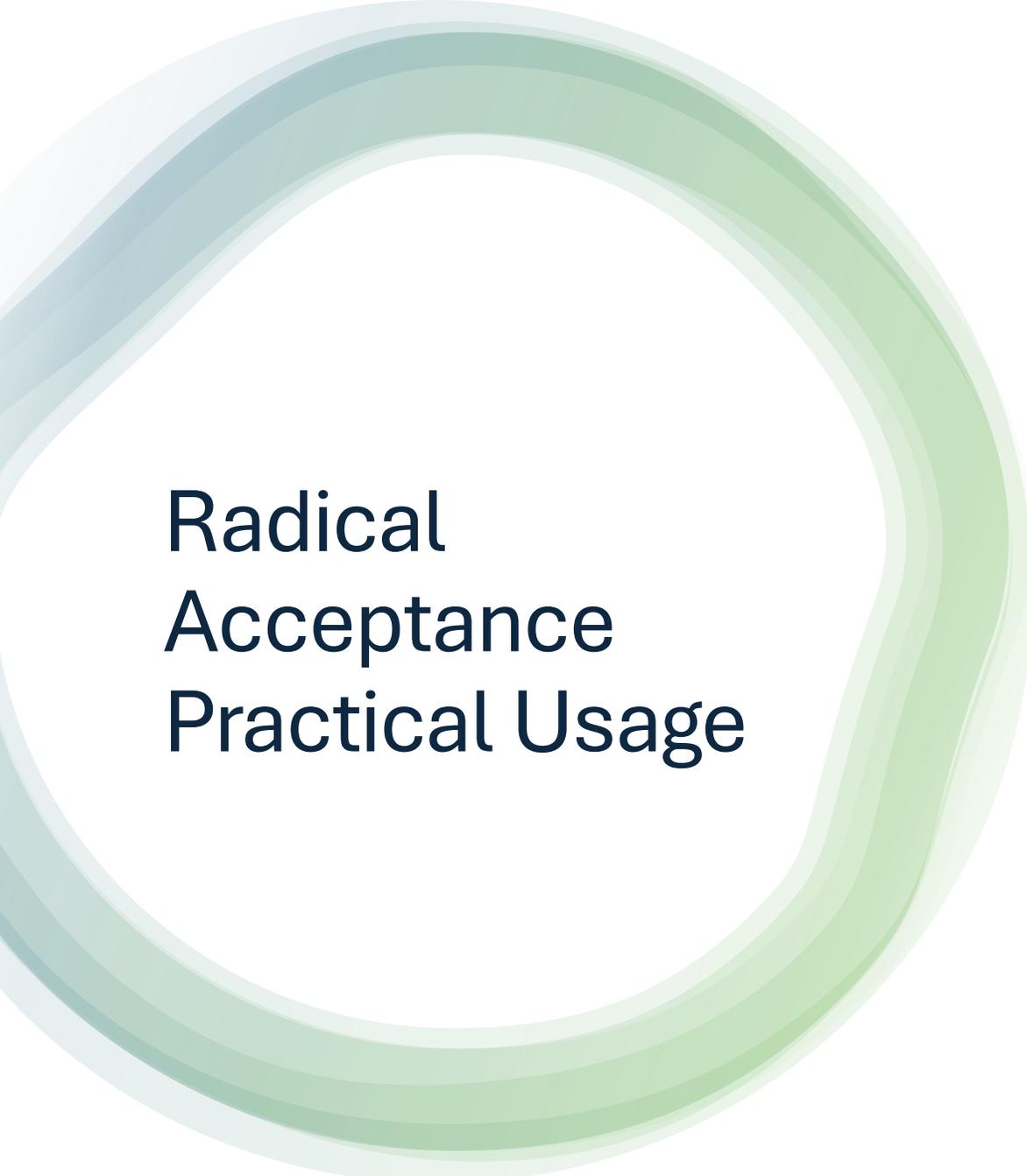
Focus on  
Influence



Conserve Energy  
with Acceptance



Build Team  
Support



# Radical Acceptance Practical Usage

1

Embrace  
Workflow  
Changes

2

Promote  
Helpful  
Culture

3

Involve  
Staff Early

# Our Radical Acceptance Approach



Accepted difficult situations and focused on the aspects we could control



Moved forward without complete information, team or leadership due to summer Rialto implementation deadline



Instead of postponing until all positions were hired or back from sabbatical, we decided to take advantage of the opportunity

# Our Action Plan

- Take advantage of the new hires' previous knowledge
- Rely on the knowledge of vendors
- Inquire with other libraries
- Research
- Leverage technology to fill in staffing limitations, and knowledge gaps



# Workflow Documentation



No centralized workflow documentation



Many gaps in the knowledge of existing workflows



Trying to figure out new Rialto workflows with limited information and no leadership

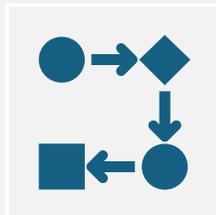


History of workflow issues, but change is not always welcome

# Workflow Meetings



Reworked the workflow meetings



Focused on the gaps -  
Collaboratively made a list of workflows that we needed to work on

# Workflow Documentation

## Legacy Docs

- Expert-Driven but outdated
- Created by former expert
- Many drafts, unused, or outdated and scattered
- Lack of clarity on processes

# Workflow Documentation

## Solution

- Workflow audit
- Consolidated shared folder
- Update, trash, or new
- LibGuide



## C&SC

Landing page for all things Collections & Scholarly Communications

- Housekeeping**
- Acquisitions**
- Cataloging**
- Electronic Resources**
  - [Troubleshooting ERM](#)
  - [Cancellations](#)
  - [WEST-Agua](#)
  - [Harrasowitz/ACRL Usage Workflow](#)
  - [Handy Links](#)
  - [Handy Info](#)
- Interlibrary Loan**
- Scholarly Communication**
- UA&SC**
- Reports and Statistics**

- Troubleshooting ERM**
  - [Troubleshooting suspicious activity](#)
  - [Troubleshooting Tickets Springshare Queue](#)
  - [OLD ER troubleshooting workflow](#)
- Cancellations**
  - [Cancelling eJournals](#)
  - [Cancelling databases](#)
- WEST-Agua**
  - [WEST-Agua](#)
- Harrasowitz/ACRL Usage Workflow**
  - [Harrasowitz](#)

# Workflow Changes



Rialto: Receiving unprocessed



Records: Stopped paying for unused records



OCLC: Canceled WorldShare

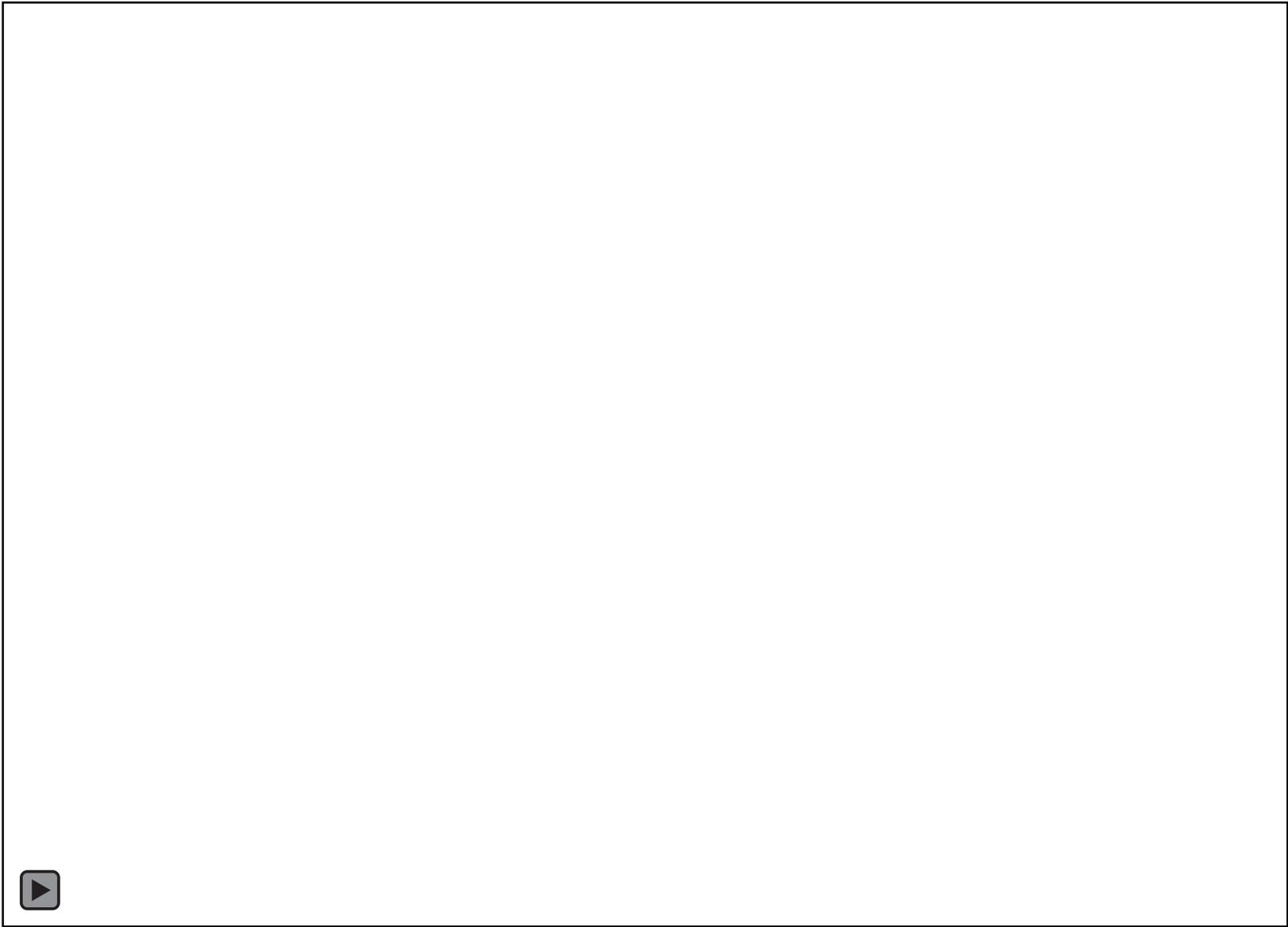


Cleanup: Identified Alma cleanup projects

# Previous Material Request Form

## Issues

- Emails to multiple people
- Requests lost/delayed
- Unclear communication



# New Material Request Form

## Solution

- One form for all material types
- Enforced by AD
- Designed collaboratively
- If/Then logic customization
- Allows list attachments
- Ticketing system integration



# LibAnswers Integration

Form feeds into LibAnswers

Creates trackable tickets

Easy assignment to staff

Internal notes track progress



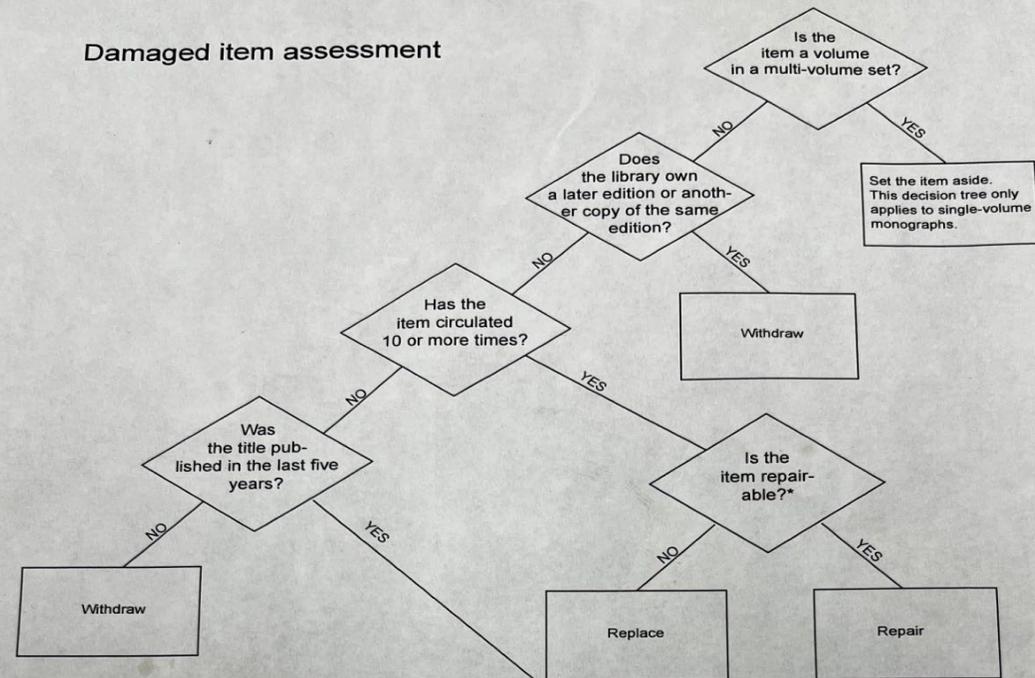
# Updating Mending Decision Tree

## Issues

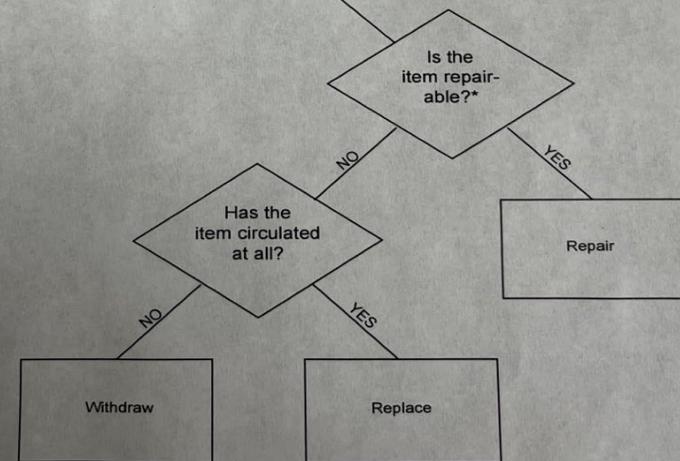
- Previous tree was a static PDF
- No longer reflected current collection retention practices
- Needed to support updated and shifting workflow across multiple units (Acquisitions, Cataloging, etc.)
- Wanted the flexibility to be quickly modified to accommodate future collections management decisions

# Previous Mending Tree

## Damaged item assessment



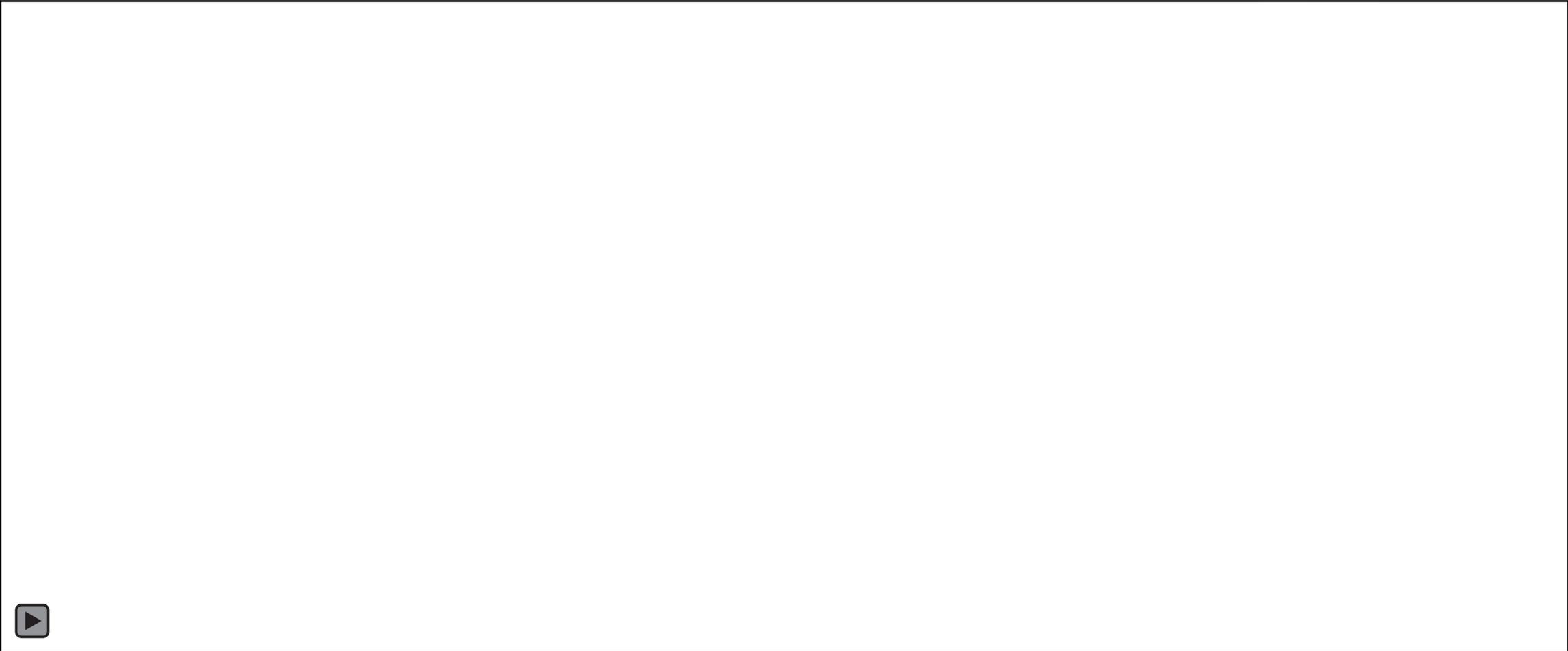
\*Items that have pages torn out may not be repairable. Most damage to covers, spines, and binding can be repaired.



# New Mending Decision Tree

## Solution

- Accessible through the Workflows LibGuide for all relevant units
- Reflects updated procedures for mending, withdrawing, or replacing items
- Demonstrated how AI can support non-coders in solving workflow problems
- Model for future tool development using AI-assisted methods



# Conclusions



- Embrace change
- Leverage new knowledge
- Documentation and workflow transparency are essential
- Organizational disruption can be an opportunity
- Technology integration and innovative solutions
- Collaborative efforts