

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

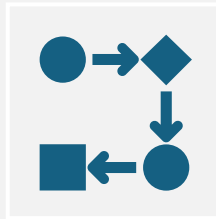


History of workflow issues, but change is not always welcome

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



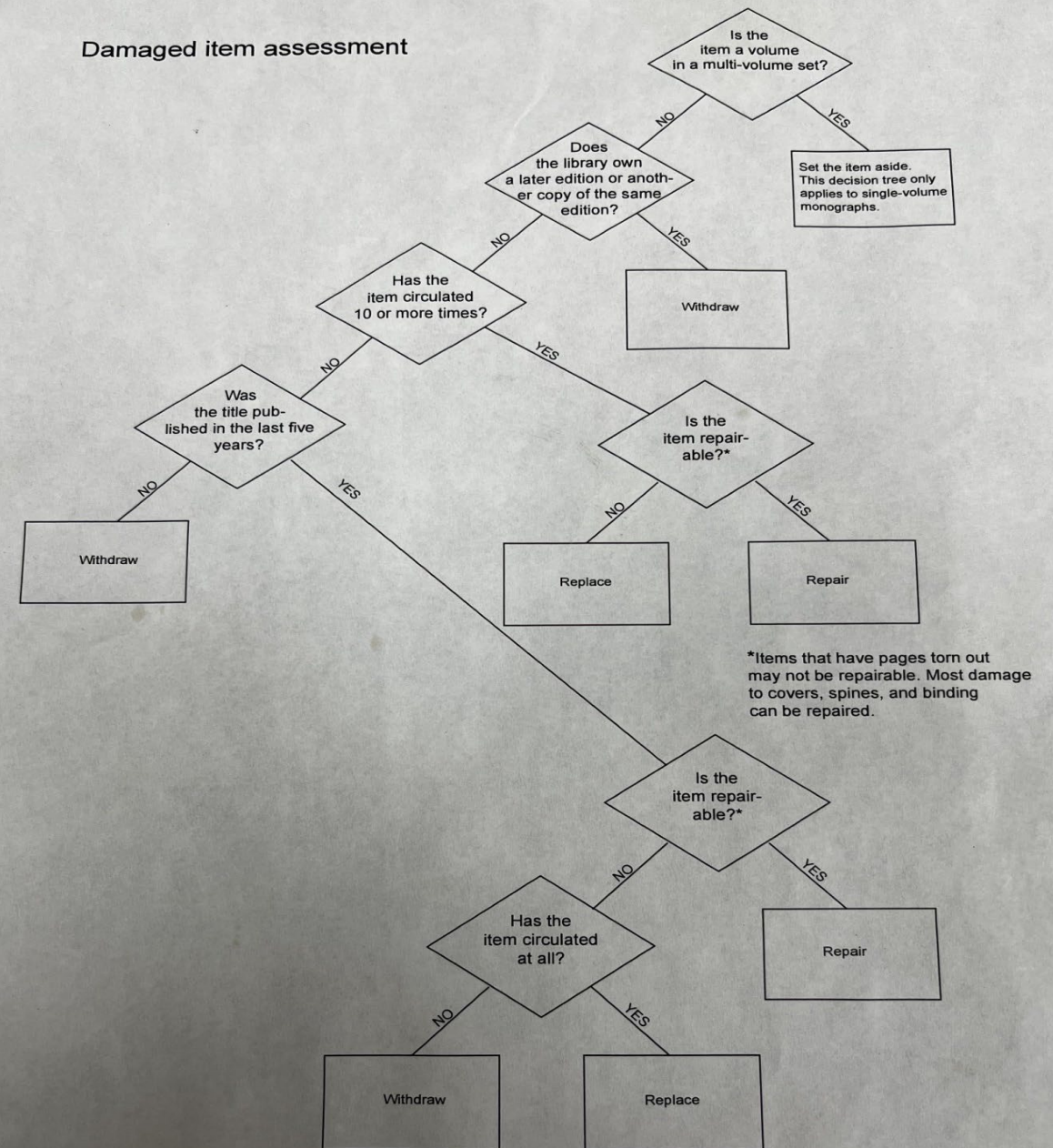
Updating Mending Decision Tree

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

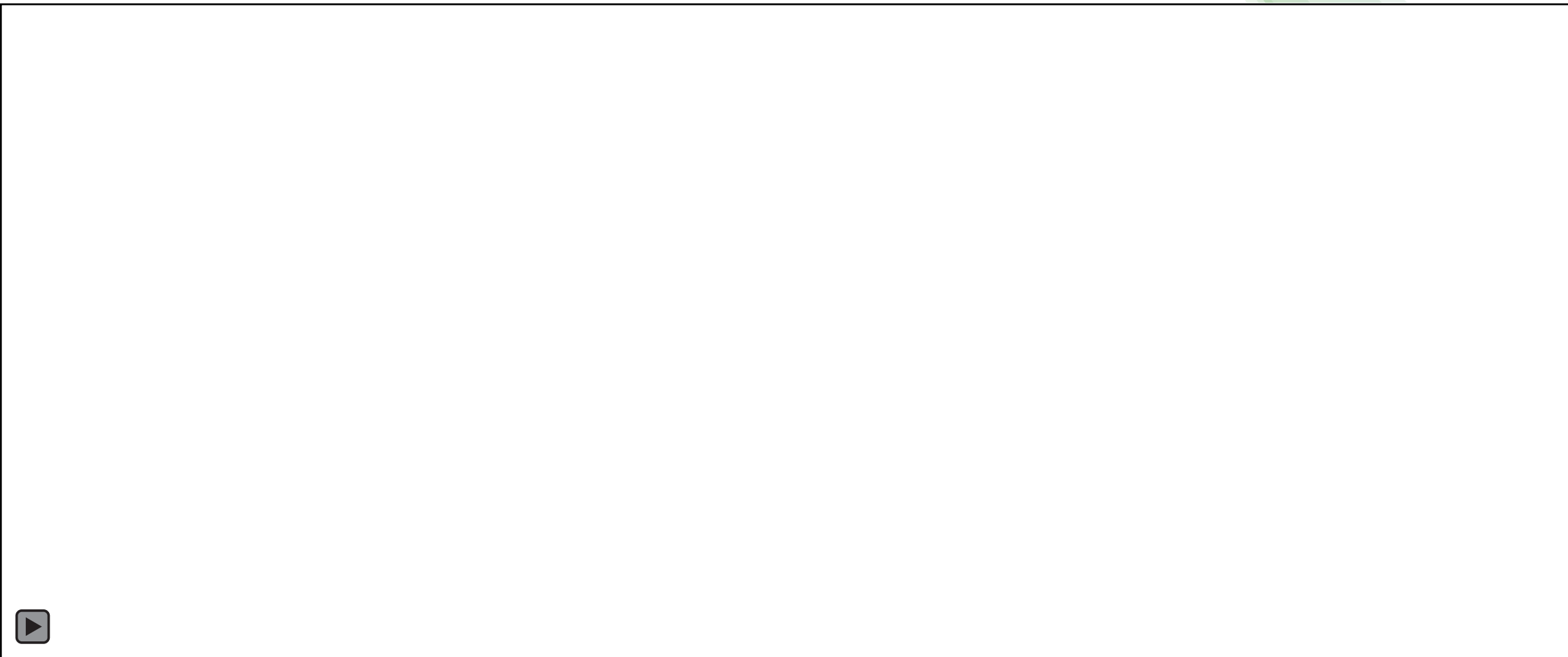
Damaged item assessment



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