Lessons from the Front: the Challenges and Evolution of an Embedded Researcher

Leah Swift, M.L.I.S.
Resource Librarian, R.V. Anderson Associates Limited
Toronto, Ontario

Introduction

This paper will examine the challenges and successes of an embedded business development researcher within a consulting engineering firm, and the subsequent evolution out of an embedded position and into the role of librarian. It will outline why and how embedded librarianship strategies were deployed, and evaluate if they were successful in a) meeting the goals and b) establishing a basis for a position of greater responsibility within the company.

In 2007, R. V. Anderson Associates Limited created a researcher position within its Information Management department. The researcher would be devoted to business development research – the background intelligence intended to augment business development activities. This research ranged from specific opportunities (advertisements for RFPs) to more general information on client practices and preferences, and competitor market share and strategy. A hybrid embedded librarianship strategy was used to drop the researcher onto the frontlines – to work alongside the project managers on the ground, winning new work and seeking new territory.

In 2013, the researcher position evolved into the firm librarian, responsible for business development research in addition to the overall, day-to-day management of the library itself (including codes and standards, reference materials used for project work, archives, cataloguing and collection development). The transition of the researcher to the position of librarian was aided by the knowledge and lessons learned through the embedded strategies.

Background

R. V. Anderson Associates Limited (RVA) is an employee owned mid-sized consulting engineering firm with offices in Ontario, New Brunswick, Newfoundland and India. RVA associates are responsible for all aspects of the company’s success, from finding new business to bridge design, and everything in between. The head office is in Toronto, with approximately one hundred and fifty employees (among them the corporate services – accounting, IT, marketing and information management). Branch offices and individual disciplines (which include water / wastewater, urban development, transportation, electrical, structures and municipal) operate
together and individually, seeking out new work within their group but collaborating on large
prospects and projects, combining both horsepower and expertise.

RVA’s first librarian was hired in the 1980s and was stationed inside of the small library
which is home to approximately 1500 reference items such as government documents, codes and
standards and 125 journals. The role was expanded in 2003 to “Information Management”, and
in 2007, the department expanded again, hiring a content administrator for the intranet and a
researcher for business development.

Reporting to the Supervisor of Information Management, the researcher was responsible
for information services (research, reference, competitive intelligence, prospect generation and
tracking and media monitoring) that were concerned with business development and the
generation of new prospects for the company. A hybrid embedded librarianship model was
developed and utilized for this role. This model allowed the researcher on the ground knowledge
of the day to day business development activities of various disciplines within the company,
while at the same time drawing on the established processes and experience of the Information
Management department.

In the 2009 “Models of Embedded Librarianship Final Report”, “Embedded
Librarianship” is defined as encompassing “the work of librarians in a research institute or
corporation whose offices are moved from a central library to their customer groups, so that they
can work more closely with the members of those groups. It includes the role of a medical
librarian who goes on “rounds” and participates in clinical care teams.” (Shumaker and Talley
2009)

In this case, the embedded component took the form of collaboration on projects such as:
developing a comprehensive list of industry mergers and acquisitions; research on individual
stakeholders active within a municipality, such as their specific concerns and past history of
involvement; competitive intelligence; environmental scan of legislative requirements for water
treatment and the public opinion; and information on a client’s preferences for project
management certification.

This work generally began with a reference request (limited investigation from
previously identified sources) or long-term research (usually resolved with both a report of
findings and a second piece of work, such as ongoing media monitoring and tracking any and all
future developments on a given topic.) This work required that the researcher proactively
identify topics of possible interest to different project managers or groups within the company, as
well as finding and refining the means through which to track these topics. In some cases work
was generated for the researcher through a request from a project manager, however in other
cases, the researcher identified a possible prospect or topic of interest and proactively
investigated. In every aspect of the job, it was necessary for the researcher to have a clear
understanding of what information was needed as well as a forum to deliver that information.

One important distinction between the traditional definition of embedded librarianship
and the model used by RVA is that while the traditional embedded librarianship is immersed in
the core services offered by their institution (accompanying a doctor on rounds in a hospital or
helping a professor develop the curriculum in a university), in this instance, the researcher was not a support for the firm’s core work. This is why this paper will call the model a hybrid – it used embedded strategies, but not for the same purposes. The researcher was instead supporting the complimentary work done by the firm to find and acquire new core work.

However, the comprehensive nature of this work – follow-up after the project commenced to track media mentions, the legislative requirements which had been investigated previously – gave the researcher valuable insight into the firm’s core services. Often, the researcher was asked to provide follow-up research on a project after it had been won, or to employ the same research methods or consult the same sources for other only slightly related research questions. This exposure to the “other side” of the business was useful in not only understanding what questions their research was being used to answer, but also what other questions were being raised. By being included in the business development focus groups, the researcher was able to understand work processes and, at the same time, the staff who made up the business development focus groups understood the researcher’s capabilities and processes.

**Methodology**

Embedded librarianship strategies proved to be a good fit for RVA because of RVA’s management philosophy – the combination of the culture of ownership (owning every aspect of the job you do) and the investment in individual people.

The initial job description provided a series of responsibilities: monitor bid opportunity websites for appropriate RFPs; proactively research upcoming business development opportunities and develop files of information in advance of the RFP; respond to business development related research and reference requests; develop and manage a competitive intelligence program; support the knowledge management system; media monitoring for client relationship management issues. This position was intended for a graduate of a Master of Library and Information Science program but was not a “traditional” library position (no circulation or cataloguing work, few reasons to be inside of the actual library.)

One of RVA’s themes is “your career at RVA is what you make it.” It can also be said that the new role was also what was made of it. Two elements contributed to the success of the position: the lack of rigid parameters (very rarely was the researcher told things like, “that’s not your job, another person will do that’’) and the potential for the role to evolve. Engineering relies upon the knowledge and experience of individuals and the investments made in their capabilities. This is also true of those providing service in support of those individuals.

RVA did not develop a “pure” embedded librarianship model for this role, instead embedded librarianship strategies were made fundamental parts of the job description. Proactive participation inside of a department’s business development activities was essential. One of the goals of the position was to be a means of communication between disciplines and client groups. The researcher was dropped into the centre of the action, and was able to take on a coordination role. This helped make her one of the avenues between disciplines and offices.
The hybrid model meant that while reporting to the Supervisor of Information Management the researcher primarily performed “on the ground” tasks for department heads and project managers. However, there were specific tasks that drew together information needs from the various individual disciplines, such as the amalgamation of prospect reporting through the company and the “big picture” of engineering consultant assignments across all regions and disciplines.

“Models of Embedded Librarianship Final Report” proposes a list of attributes to distinguish embedded from traditional modes of library service. (Shumaker and Talley 2009) The researcher utilized several of these strategies, among them:

- Focused on Small Groups not Entire Populations
- Dependent on Domain Knowledge not only Library Skills
- Aiming for Analysis and Synthesis not simply Delivery

Focused On Small Groups Not Entire Populations

It is the nature and mandate of information management within RVA to provide service to the entire company, despite province, country, time-zone, discipline or the nature of the request. This was also the mandate of the researcher, within the scope of marketing and business development. However, the researcher role was in part an attempt to concentrate efforts on the smaller groups within RVA.

There were two types of groups that the researcher participated in: business development focus groups where individual disciplines sought new work and developed ways to find new work and promote existing work and capabilities; and the client relationship management groups (CRMs) where RVA staff (usually project managers and directors) discussed and tracked the ongoing relationships with specific clients.

Dependent On Domain Knowledge Not Only Library Skills

Engineering is a technical field, and RVA employs people with multiple degrees who are considered experts within their respective fields. This creates a climate where everyone is expected to be an expert (or an aspiring expert) and the role of the Information Management department straddles being an expert and being an expert on assisting experts. The researcher did not have a background in civil engineering but was expected to be able to grasp the technical concepts behind research questions.

This challenge was met by a series of strategies such as: being the expert on how to monitor for changes; being the expert on knowing how things (such as standards and legislation) change and when; being the expert in how to search and on where to search; and being a source of information on who within RVA’s organization was an expert on a given topic or client. There was also a training component to these strategies – internal workshops by Information Management to educate different groups within RVA on how to access (and filter) the resources available.
Aiming for Analysis and Synthesis not simply Delivery

Another strategy suggested by “Models of Embedded Librarianship Final Report” is that the embedded librarian aims for analysis and synthesis, not simply delivery of information. (Shumaker and Talley 2009) This was implemented through a variety of reports and resources which covered competitive and client intelligence topics, that were specifically tailored for the smaller groups.

One of the researcher’s key roles was synthesis – the distilling of information from a variety of different sources into a coherent summary or description. The sources consulted could range from technical environmental reports to one line budget projection, and everything in between. Here too, the knowledge gained from the embedding was useful in determining what exactly the end user (usually a project manager or director) needed to know to make a decision. The synthesis of information in the hands of the researcher was more efficient than different disciplines producing the same report but duplicating effort. It was also a way of fact-checking within the research process – providing a second source for confirmation of a rumor or evidence of a pattern.

Another responsibility was analysis of the research. This included statistical breakdown of topics such as market share. The groups that the researcher was embedded in (both Marketing, and the client relationship management groups), it was possible to analyze data from different perspectives and to prepare reports that examined information in different ways depending on the information needs of the end user. While straight information delivery was always a part of the role (especially for responsibilities such as media monitoring or current awareness), it was often necessary (and in many cases preferred) to include some interpretation of the information as well.

The *Information Outlook* article, “Lessons from successful embedded librarians” discusses communication and promotion as one of the themes of embedded librarianship. The article states that the corporate sites surveyed “lacked communication strategies for their formal embedded librarian programs. The tactics they used included advertising on the corporate intranet and promoting librarians’ capabilities at managers’ meetings”.

While there was no formal communication strategy in place, a short verbal report was part of the agenda for the monthly business development meeting, both as a means of evaluation and to highlight (and advertise) the researcher’s capabilities. Internal training programs (lunchtime brownbag presentations) were also used to promote the resources. The company’s intranet / knowledge management system was maintained by the Information Management department and was a natural tool for promoting new business development research. This took several forms – from posting some of the reports previously mentioned to maintaining a blog of news articles about clients.
Evaluation and Interpretation of Results

Quantitative Measures

It is difficult to apply quantitative measures to this sort of position. There is the question of whether improvements over time are due to the embedded strategies or due to the natural adjustment to a new position. Some of the quantitative measures used included:

1) A comparison of the origins of research questions – whether they were generated from within the focus groups / client relationship management groups or whether they were brought to the researcher’s attention outside of them (i.e., by an individual project manager at the time of a proposal). Although kept rather haphazardly by the researcher as a reference log, when compared over the researcher’s tenure at the company, progress could be mapped using measures such as: volume of questions, complexity of research needed and length of engagement (one time answer vs. ongoing monitoring).

2) How many RVA employees were consulting the researcher. Because of RVA’s relative small size, it was possible to identify who was not consulting the Information Management department in general, and the researcher specifically. In the event that a project manager was not using the services offered, it was then possible to ask why or to adjust search parameters to target their needs more effectively.

3) Tracking the use (times accessed, number of users) of research tools and reports. It was possible to track this through how many times a report or page had been access through the knowledge management system. It was also possible to “declare victory” when a pilot report became an expected attachment to a focus group agenda.

4) Collection and analysis of feedback. Feedback was instrumental in improvements in research and reference services, identifying knowledge gaps and fine-tuning efforts.

Qualitative Measures

In the Information Outlook article, “Lessons from successful embedded librarians”, the authors state, in regards to evaluation at the corporate sites surveyed: “the clearest indicator of success was continued demand from the user groups”. (Shumaker and Makins 2012)

The most useful qualitative measure used by RVA’s Information Management group was the degree to which it was accepted that the researcher was the person who could answer the business information questions. Evidence of this was present at focus group meetings where new employee or junior staff were told, “[researcher] can help you find information on that” or “go to [researcher] for that information, she’s already compiled it or something like it.”
Surprise Plot Twist!

In late 2013, the Supervisor of Information Management moved up to a more senior role combining the supervisory aspects of the information management role and human resources, while the researcher transitioned into the role of Resource Librarian. The professional development and training responsibilities remained with the Supervisor of Information Management (now Human Resources Lead) but the management of the library itself became the responsibility of the (former) researcher.

There were several challenges inherent in this transition, such as maintaining the current high level of service to internal clients while balancing the library and the business development research component. An expanded role did not mean fewer or more defined research questions, rather the opposite. In some cases, this meant prioritizing requests based on deadline or effort required, in others it meant training. The transition was aided by the researcher’s previous experience within the business development groups – already having the knowledge necessary to proactively anticipate information gaps.

Lessons from the Front

The following are some of the lessons that can be drawn from this experience:

*Embedded librarianship is not adaptable to every scenario or type of library.* The most important criteria in this scenario – embedded within the business development activities of various disciplines – was that there was pre-existing arena for the researcher to enter. Business development at RVA already incorporated collaboration, analysis and bureaucratic elements, and this provided an opening for the researcher to participate in the staging of the operation.

*A clear mission with defined parameters* helps, but is not necessary. The initial vagueness of the role had the effect of creating more opportunities for the researcher to provide assistance, and take a stronger coordinating role in business development activities. By not defining boundaries and borders of the role, the researcher was encouraged (and in some instances forced) to go outside of them, into new and challenging territory.

*Go to battle with the army you have, not the army you want.* Although not every detail of the position was fully fleshed out at the beginning, the researcher was nonetheless dropped into the discipline groups, and gained exposure to projects as they progressed. This helped her gain knowledge of both the process and the end result of the research she would be doing almost immediately. Immersion in the process also helped the researcher gain awareness of the information gaps she would be working to fill and the vocabulary needed to navigate the front. In turn, this meant that training, collection development and resource creation emerged out of what the researcher had been exposed to, rather than an established framework from above. This
helped tailor the resources and research effort to the needs of the internal clients, both before and after the transition from researcher to librarian.

*War makes strange allies.* Both in the sense of what conversations took place at the CRM group meetings (what dots were joined) and in the sense of who used the researcher’s services and who benefitted. One alliance was the close relationship with Marketing, especially in terms of media monitoring and competitive intelligence used during the proposal writing stage. Research done at this stage and from this perspective could be adapted to other stages and perspectives. In some cases, it informed what topics should be investigated or monitored going forward. Another alliance was with the knowledge management system content administrator, whose suggestions including building new databases within the existing system and suggesting new uses for and expansions to existing databases. This collaboration was also instrumental in the more efficient use of resources that had been developed by the researcher. Another interesting partnership was the use of the researcher by emerging project managers – those seeking to establish themselves by seeking out new business development opportunities. While the researcher introduced them to the tactics used to gain new business, she also gained new search topics.

Finally, *No plan survives contact with the enemy. And this can be a good thing.* The success of the researcher position was aided (perhaps even dependent upon) the evolution out of the official job description and into the blurred borderlands of fulfilling business development research and information gaps when and where they arose. In some cases this evolution was forced by necessity or circumstances, not planned for or specifically guided.

**Conclusion**

“Models of Embedded Librarianship Final Report” states: “By enabling librarians to build relationships, establish trust, and understand the work of their users – whether teaching faculty, students, researchers, clinicians, business leaders, or others – it provides the environment in which the value, alignment, and visibility of information services can all be heightened to a new level.” (Shumaker and Talley 2009) In the case of RVA and the researcher this new level had a literal component – the new position.

The hybrid embedded librarianship strategy developed and implemented by RVA was effective in closing the business development information gaps, and ultimately, providing a good foundation for the evolution of the researcher role into the librarian role – charging across the established borders and into new and exciting territory.

**End Notes**
