Embedding a records manager as a strategy for helping to positively influence an organization's records management culture

Lynne Bowker and César Villamizar

Records Management Journal 2017 27:1, 57-68

<http://www.emeraldinsight.com/doi/abs/10.1108/RMJ-02-2016-0005>

Embedding a records manager as a strategy for helping to positively influence an organization's records management culture

Lynne Bowker and César Villamizar

University of Ottawa, Canada

ABSTRACT

Purpose

– This case study aims to explore the benefits of embedding a records manager into a team of university administrators to help them address their information management needs.

Design/methodology/approach

– The article describes an experience that was inspired by reports of successful experiences with embedded librarianship. The literature on records management culture and embedded librarianship is reviewed to identify best practices and criteria for success. These criteria are used to design and implement a pilot project where, rather than hiring a consultant, a records manager is embedded into a quality assurance team working at a large university in Canada.

Findings

– The project is a success in conventional terms (e.g. active files reduced; duplicates deleted; inactive files archived; naming conventions, version control and access rights applied); however, similar results could have been achieved using a consultant. More interesting are the added benefits achieved through embedding. Added benefits included identifying workflow inefficiencies, identifying terminological inconsistencies, iterative training opportunities, and useful knowledge sharing outside the project's scope. The argument is made that an embedded information professional is better able to appreciate the organizational culture, which in turn facilitates the establishment of trusted relationships and produces an overall added value for the entire team.

Originality/value

– There is very little, if any, current literature that explores the value of embedding a records manager into a team, rather than simply hiring a consultant to address information management needs. The outcome of this pilot project will benefit those who are seeking to develop a model for embedding an information professional into their organization to gain an added value.

Keywords: Embedded librarianship, Records manager, Community-building, Organizational information culture

Introduction

At the University of Ottawa, the Faculty of Graduate and Postdoctoral Studies (FGPS) is being significantly restructured with the intention of transferring a number of responsibilities, along with associated records and documents, to other units on campus. However, the FGPS has a history of ad hoc records management. It was therefore critical to address this issue in the context of the proposed restructuring. This paper presents a case study that describes how a records manager was embedded

into the FGPS as part of a strategy to effect a positive change on records management practices. First we present the institutional context. Next, we explore some issues related to organizational culture and records management, and we explain how the concept of “embedded librarianship” was adapted as part of a strategy to positively influence the records management culture at the FGPS. Finally, we present a number of criteria that were identified as key for successfully embedding an information professional, and we conclude with an evaluation of the pilot project.

Institutional Context

The University of Ottawa is a large, research-intensive university in Canada. It is a fully bilingual institution, offering its programs and services in Canada’s two official languages—English and French—which have equal status. As of January 2015, there were 1262 regular professors and 42,672 students, which included 6,604 graduate students. Currently, the university’s Faculty of Graduate and Postdoctoral Studies has 36 full-time employees and it operates as a centralized body that oversees both the strategic and operational aspects related to graduate studies. However, as part of a major administrative reorganization at the University, the administration of graduate studies is currently being restructured. Strategic tasks will remain in a streamlined central office of graduate studies. However, over the course of the year 2016, the majority of the operations-related tasks will be decentralized and transferred to the individual disciplinary Faculties (i.e., Arts, Education, Engineering, Law, Science, etc.) where the graduate students are pursuing their programs of study. In addition, as part of the restructuring, the task of managing the cyclical program reviews will also be migrated out of the FGPS and into a centralized office. Currently, cyclical reviews for undergraduate and graduate programs are handled separately by different teams in different offices; however, the plan is to consolidate these teams and to create a single centralized office of quality assurance by the end of 2016.

The principal repository for storing information at the FGPS is a shared network drive, and the information stored there is typically accessed and managed using Windows Explorer. In advance of transferring responsibilities to other units, FGPS employees began to try to identify documents and other information objects that would also need to be transferred. It quickly became clear, however, that the information management practices being employed at the FGPS are far from being best practices. The classification system in use is “homegrown” and had evolved in an ad hoc way over a 17-year period based on the preferences and practices of individual users.

For example, as of September 2015, the shared drive contained over 180,000 files, which were (loosely) organized into eleven different levels of folders. Additionally, no naming conventions had been established or applied. Not only did individuals use their own cryptic naming systems, the fact that the University of Ottawa operates in both of Canada’s official languages meant that some employees named files and folders in French, while others used English. Searching for information therefore often required two separate searches – one using English terms and one using French terms. Coupled with the lack of naming conventions was the lack of a system for version control. This resulted in absurdly named files such as, “Volume1-FinalFinalFinal.doc”, or a series of files where subsequent readers simply appended their initials to the filename after making modifications to produce documents with names such as “Volume1-MU-JJ-LB.doc”. A further challenge was that, instead of storing personal information in their own folders on a separate drive provided for this purpose, some employees stored this information on the shared drive. Therefore, when searching for information, it was necessary to navigate past folders with names such as “Helping Emilie from Downstairs” or “New stuff”. Finally, access rights were

managed only in a very loose way at a folder level, and most employees had access to almost all the material stored on the shared drive.

While the FGPS does have a small information technology team, its members are not information management (IM) specialists, and they are not responsible for IM-related tasks overall. Similarly, the University's central Information Technology unit, which includes the Office of the Chief Information Officer, comprises mainly computer specialists, rather than IM specialists. Their principal mandate is to leverage information technologies to provide solutions. While technology may contribute to improving information management practices at the FGPS, it cannot provide a comprehensive solution. Rather, additional elements, such as a well-thought out classification system, naming conventions, version control, a retention schedule, an access rights management plan, and training in best practices, are also required.

The University Archives has a mandate to promote and support sound information management practices; however, it employs only two archivists and a single records analyst to serve the entire university community, including assisting with the management of both physical and electronic documents. While the records analyst was able to provide some very general information, such as a very high-level document classification scheme and records retention schedule used at the university, he was not able to provide personalized service—such as a needs analysis, design of a customized classification scheme and naming conventions, or training in best practices for document management—for the FGPS. He did, however, indicate that the University did sometimes employ consultants to provide IM support.

The responsibility for identifying an appropriate solution was assigned to the Vice-Dean of the FGPS. The Vice-Dean is also a professor of translation whose area of research is natural language processing. Because of this specialization, she also holds a cross-appointment to the School of Information Studies. Although she is not an expert in IM or records management, she has nonetheless had a general exposure to the literature in the field of Library and Information Science. Accordingly, when exploring the options available for acquiring expert help to address the IM needs of the FGPS, she did some further reading and also engaged in conversation with colleagues in the field.

Embedding as a strategy to influence organizational culture

The initial and most obvious choice was to hire a consultant. The consulting model is a well-known one that offers many advantages. Shumaker (2012, 16) provides an excellent description of consultant librarians, noting that they typically offer mobility, proactivity, energy, and focus. They come to the client's location and engage with the team. They function as specialized role players with a unique expertise—in this case, information analysis and management—that the client needs in order to achieve certain objectives. They focus their energy on a team and are able to spot information problems that others on the team may not recognize. Consultants are in a position to come up with solutions crafted to the special needs of the team, and they establish relationships that last for the duration of the engagement. The consulting model certainly has many positive aspects, but one of its most significant drawbacks is that consultants are typically viewed as specialized role players, not as full members of the team. The consultant contributes advice, and sometimes solutions, but in a limited sphere bounded by preconceived ideas of the consultant's expertise. The consultant may not develop a strong knowledge of the team's work and may not feel a responsibility for overall team outcomes. Not viewed as a true member of the team, the consultant is only asked for advice in situations in which the team members feel they need specialized expertise.

In contrast, Shumaker (2012, 16-17), suggests that some of these drawbacks could be overcome by engaging an embedded librarian, rather than a consultant. The embedded librarian contributes to a team or an organization through customized, specialized, value-added information management and analysis. Embedded librarianship, when fully developed, embraces a strong, ongoing working relationship between the librarian, team leaders, and other team members, along with a sense of shared responsibility among all for outcomes and achievements. The embedded librarian develops a sophisticated understanding of the team's domain. While the embedded librarian does not acquire the same level of expertise in a domain that other members have, the sophisticated understanding enables the librarian to become much more effective at customizing information solutions and adding value. The embedded librarian often contributes novel and useful insights and solutions to team problems that go beyond the expected bounds of the librarian's role. The embedded librarian combines proactivity and energy with strong working relationships, close alignment with team goals and objectives, shared responsibility for outcomes, and full membership in the team.

A wider literature search reveals that, while the concept of embedding is becoming increasingly established in librarianship, this concept does not appear in the records management literature. However, the records management literature does reflect a growing awareness of organizational culture as a key factor in establishing successful records management practices. As noted by Sundqvist and Svärd (2016, 9), despite investments in information technology and legal frameworks, many organizations are still grappling with the implementation of good records management practices. They posit that other less tangible factors have an impact on records management, including the information culture within an organization. Similarly, Oliver and Foscarini (2014) emphasize the importance of tackling the so-called "people problem" and suggest that a deeper understanding of organizational information culture can facilitate the development and promotion of sound record-keeping practices.

Daum (2007) outlines a series of criteria that she identifies as being critical for helping an organization to evolve its records management culture from one where employees use ad hoc methods to one where they adhere to program policies and procedures. Daum (2007, 43) notes "Even after developing new records management program policies, procedures, and retention rules, an organization's records management culture will need to evolve to close the gap caused by embedded personal work habits and department silos if it is to have a successful enterprise-wide records management program." Among the criteria identified by Daum are the need for executive-level support, training, communication, and the identification of incentives. The importance of some of these criteria has been echoed by other records management scholars.

For instance, Oliver (2008, 379) suggests that information cultures exist in all organizations, but an effective information culture requires effective communication flows, cross-organizational partnerships, co-operative working practices and open access to relevant information, management of information systems, clear guidelines and documentation for information and data management, trust and willingness to share information.

Meanwhile, Foscarini (2012, 21) believes that "in order to fulfil their crucial role, records managers should go beyond their narrow technical focus and become more culturally sensitive participants of their organizational reality." She puts forward an argument for an inclusive and participatory approach that sees records management professionals working collaboratively with both staff and managers in the organization to define the cultural landscape in which records systems are going to be built and used. According to Foscarini (2012, 32), "Trying to understand management objectives and beliefs, as well as the values that people attach to information – with the purpose of, *inter alia*, anticipating how

these and other factors may interact with records management and archival principles and methods – is at least as important as learning business process modelling according to engineering or systems analysis techniques.”

Likewise, Wright (2013, 18) claims that because records reflect an organization’s business practices, records management practices are therefore inseparable from the organizational culture in which they are found: “The culture is both effected by, and affects the efficacy of records management by end-users, management and records management specialists.” Wright (2013, 26) goes on to recommend that, in order to achieve success, an organization must integrate participative information management practices into its information culture, observing that horizontal relationships could be more effective than vertical ones for developing a transformative information culture.

Overall, the records management literature reveals several common themes that relate to organizational information culture and its impact on the design and implementation of effective records management practices: the importance of collaborative relationships, trust, sharing, and training and communication. Meanwhile, these also represent values advanced by embedded librarianship.

In a paper seeking to better understand the nature of records management, Buckland (1994, 349) argues eloquently that “it is beneficial that other occupational groups also have a vested interest in tackling the same or related problems. [...] The more ideas that can be derived from other fields, the better the records management service will be.” Buckland goes on to argue that there could be both theoretical and practical benefit in viewing records management as part of a family of related information professions—including librarianship, archives management, indexing, database management, and museology, among others—and in looking for common approaches or seeking inspiration from these related professions where relevant. With this in mind, we therefore turned to the field of librarianship, to investigate more fully whether the concept of “embedded librarianship” could be usefully adapted to help address some of the challenges faced by organizations with regard to information culture and the development of a successful records management practices.

Over the past decade, the concept of “embedded librarianship” has become increasingly common (Schulte 2012; Vassilakaki and Moniarou-Papaconstantinou 2015). As pointed out by Myers and Warner (2013), among others, this concept was inspired by the so-called “embedding” of journalists into U.S. military activity during the Iraq war which began in 2003, and it implies that the embedded group experiences, as much as possible, the day-to-day activities of the group to which it becomes attached. Drewes and Hoffman (2010, 75) observe that while embedded librarianship is most commonly linked with academic librarianship, and particularly with undergraduate instruction and distance education, the concept can extend to other areas, such as corporate and special librarianship. Kesselman and Watstein (2010, 384) go so far as to state “Indeed, explorations of new, embedded roles for librarians in all types of organizations abound as seen in the increase of articles on this topic.” However, as noted above, this concept does not yet seem to have been explored in any great detail beyond librarianship proper. It is true that some organizations do hire records managers on contractually limited appointments to assist with major records management projects; however, we could find no discussions in the literature about truly embedded experiences in this field. Therefore, inspired by some of the of success stories reported with regard to embedded librarianship (e.g. Riccio 2012; Wu et al. 2013; Rowlands and Knapp 2015), and having a serious need for improved records management, the Faculty of Graduate and Postdoctoral Studies at the University of Ottawa elected to experiment with an *embedded records manager* as part of a strategy to improve the records management culture of the FGPS. This case study presents the results of this experience.

Making the case for an embedded records manager

After doing additional reading and speaking with some librarians at the university who had experience working in an embedded situation, the Vice-Dean determined that the concept of embedded librarianship could most likely be adapted to other information professions, in this case records management, and that an embedded records manager might be better able to positively influence the information culture of the FGPS than would a consultant. Accordingly, the Vice-Dean prepared a business case and pitched the idea of engaging an embedded records manager to the senior management team at the FGPS, which in addition to the Vice-Dean, comprises the Dean, the Associate Dean, the Assistant Dean and Secretary General, the Chief Administrative Officer, and the Assistant Registrar (Graduate Studies).

To make the case for hiring an embedded records manager rather than a consultant, the Vice-Dean identified criteria from the literature that had been suggested as keys to success. A number of these have been summarized by Shumaker and Talley (2009) in their report on models of embedded librarianship, and additional support was drawn from the records management literature. These key criteria are outlined below.

- **Funding:** In many of the reported success stories, the salary of the embedded librarian was paid partially or wholly by the client group, rather than by a central service. This funding structure helped to ensure that the client group was fully invested in the success of the embedded model.
- **Location:** Though it was not considered absolutely essential for the embedded librarian to be physically located within their client group, many of the success stories did use this model, noting that it facilitated interactions and relationship-building.
- **Supervision:** Supervision by a member of the client group, rather than by a library manager, was a factor that was noted in many of the successful embedded positions. The engagement of client management in activities such as integrating the new embedded librarian into the group and providing input to the librarian's performance review are seen as tangible signs of the client manager's buy-in to the embedded service.
- **Support from the organization's leadership:** In many of the reported success stories, embedding librarians was seen as a strategy for strengthening the organization and offering an improved level of service. Similarly, Daum (2007, 43) identifies executive-level support as crucial for evolving the records management culture within an organization.

Some of the anticipated benefits of adopting an embedded model are that the embedded professional will be more motivated to, and better able to, develop a thorough understanding of the organizational culture and to participate in the development of common goals. As a team member, rather than an external consultant, the embedded professional will be in a position to develop horizontal relationships that will encourage trust and sharing.

The senior management team approved the idea in principle, and in particular, they agreed to fund a four-month pilot project where the records manager would be embedded within the quality assurance (QA) team, which is supervised by the Vice-Dean. As noted above, as part of the restructuring of the FGPS, the responsibilities of the QA team would be among the first to be transferred out of the FGPS and to a new central office of quality assurance. In addition to the Vice-Dean, the QA team has two full-time employees: a director and a coordinator. Together, the QA team is responsible for managing the cyclical reviews of each of the 185 graduate programs offered by the university. These reviews are

required by the government of the province of Ontario, and each program is reviewed on a seven-year cycle. Overall, the work of the QA team is essentially one of project and process management, and as part of this work, a wide range of documents are produced and gathered, including agendas and minutes for the Graduate Program Evaluation Committee meetings, schedules for the cyclical review, self-evaluation documents, statistics about applications, admissions and registrations, research funding received by professors, information about co-op work placements, a summary of the library's collection relevant to the discipline, post-graduation employment information, reviewers' reports, unit responses, final assessment reports, executive summaries, correspondence, itineraries for on-site visits, templates, guides, workshop presentations, governance and policy documents, to name just a few. Moreover, the work of QA team is subject to a periodic audit by the province, so it is essential that relevant records be retained and organized.

The Vice-Dean agreed to take on the role of project champion, and she participated in the selection and hiring of the embedded manager. The candidate who was retained has an undergraduate degree in business, as well as a graduate diploma in management, and several years' of experience working as a business analyst. In addition, he obtained a Master of Information Studies from the University of Ottawa in 2015, and as part of that program, he participated in an eight-month full-time work placement at Canada's Library of Parliament as a systems analyst. During his studies, he also worked as a research assistant on two different projects. The work at the Library of Parliament allowed him to gain experience with records management in a large bilingual organization, while his experience as a research assistant and student at the University of Ottawa gave him some initial general insights into the organizational culture of this institution.

The Vice-Dean acted as the immediate supervisor of the embedded records manager and helped to integrate him into the QA team (e.g. by making introductions, securing resources). The embedded records manager was given a desk in the same pod as the other QA team members and he participated in weekly team meetings. He also had the opportunity to meet bi-monthly with the senior management team to provide updates on the project. In addition, as an FGPS employee, the embedded records manager also participated in other meetings, such as the general FGPS staff meetings, where he received a broader exposure to the overall business of the FGPS. The embedded records manager also participated regularly in informal and formal social and team-building events (e.g. coffee breaks and lunches with team members, holiday party).

Evaluation of the pilot project

From the point of view of addressing the information management needs of the QA team, the pilot project can certainly be considered a success. The number of active files stored on the shared drive has been reduced by approximately 50%, with duplicates and early versions of documents being deleted, and inactive files being archived. In addition, the number of levels of folders has been reduced from eleven to five. A naming convention, which includes a method of indicating versions, has been developed and applied. An access rights management plan has also been implemented. Moreover, the project was completed on time and on budget. Undoubtedly, however, similar results could have been achieved by hiring a consultant. What is more interesting, therefore, is to evaluate whether there were any added benefits as a result of adopting an embedded model which saw a records manager embedded within the QA team.

One clear and overarching benefit to hiring an embedded employee rather than a consultant was the fact that as an employee, the records manager was highly motivated to, and also empowered to, invest

in learning about the organizational culture as part of his job. For instance, the University of Ottawa has a Centre for Organizational Development and Learning (CODL) that offers employees a wide range of workshops, including some such as “The University at a Glance” and “Success as an Administrative Employee” that help to inform participants about the organizational culture of the institution. The embedded records manager participated in CODL workshops, as well as in a range of FGPS activities as outlined previously (e.g. team meetings, all-staff meetings, social and team-building events). This contributed to the embedded records manager’s ability to develop horizontal trust-based relationships within the FGPS and the University. He was—and was seen to be—a peer who had a shared understanding of the organizational culture as well as a shared interest in the success of the institution. This status as a trusted peer also made it easier for the embedded records manager to develop relationships with colleagues from other units at the university and to involve them in the project. For example, he invited a number of colleagues from outside the FGPS to act as external stakeholders in the project, including the records analyst from the University Archives, a representative from the Office of the Chief Information Officer, and two professors from the School of Information Studies. Their participation not only brought in additional expertise, it also helped to increase the credibility and the visibility of the project and to underline the value of good records management practices for the institution. The peer status of the embedded records manager facilitated the development of ongoing relationships across the institution.

In general, the literature on embedded services documents an evolution in the level and nature of services provided by professionals in these embedded roles. As pointed out by Shumaker (2012, 12), “Embedded librarians transcend service because they become partners.” As a partner, the information professional is fully engaged and is a member of a team whose members are mutually responsible for the overall outcome. It is different from a service relationship, and it is what happens when embedded relationships are fully developed. This is in line with an observation made by Buckland (1994, 349), who points out that “the *mission* of a records management service needs to be related to and supportive of the mission of the organization as a whole.” By being a fully-integrated team member, the embedded records manager was in a position to truly understand the work carried out by the QA team and to align his goals with theirs. The team as a whole had a shared series of goals, and all members, including the embedded records manager, contributed to their achievement. For example, as he was learning about the cyclical review process managed by the QA team, the records manager helped them to analyze and map the process more clearly. This highlighted a number of inefficiencies, which the team could then work to correct (e.g. doing some tasks in a different order, streamlining overlapping tasks, reallocating responsibilities among team members). The insights and expertise in process mapping provided by the embedded records manager greatly assisted the team with their overall goal of managing the cyclical review process more efficiently. Evidence for this can be seen in the fact that the time required to complete the first stage of a cyclical review, which is the development and approval of a program’s self-evaluation report, has been reduced from an average of 17 months in 2011-2012 to an average of 13 months in 2015-2016.

In another example, as the embedded records manager worked with the QA team to develop file naming conventions, he was able to alert the other team members to terminological inconsistencies that appeared in their documentation. As a result, the entire QA team, including the records manager, examined their terminology more closely and worked to develop a bilingual glossary and style guide. Now, the documents produced by the team are more consistent and communications with the team’s stakeholders (e.g. the academic units under review, the provincial government) are clearer and thus generate fewer questions for the team to answer or clarify. In addition, the bilingual glossary has also been adopted by the Language Services unit at the University of Ottawa, who are responsible for

translation services at the university. The University of Ottawa is Canada's only fully bilingual university, and as such it has a unique organizational culture in which linguistic duality plays a special role. An external consultant would undoubtedly find it more challenging to navigate this unique yet vital aspect of the organizational culture than did the embedded records manager, who was fully immersed in it. Thus the presence of the embedded records manager contributed to improved linguistic practices that benefitted the university community at large—an unanticipated, but highly appreciated, added benefit.

On the subject of language, Oliver and Foscarini (2014, 74) have emphasized the fact that language is a social phenomenon that has a significant impact on the creation, use and maintenance of recorded information in an organization. The University of Ottawa operates in both English and French. However, in the absence of any formal guidance, members of the FGPS had applied bilingualism to their records management practices in a very ad hoc and inconsistent way. Some had used only English, others only French, and still others had attempted to reflect both languages and produced some very unwieldy constructions. In working closely with the QA team, and in taking the time to fully understand the organizational culture, the embedded records manager was able to propose a solution that is manageable and that also reflects the spirit of bilingualism that is at the core of the University of Ottawa: the folder structure is named in French, while the files are named in English. While language can be a very sensitive issue, this respectful solution was readily accepted by both the English- and the French-speaking colleagues at the FGPS.

As noted above, Daum (2007, 43) and others emphasized the importance of training and communication for the success of records management. The provision of training, both formal and informal, was another benefit of having the records manager embedded within the team. Not only did he provide formal workshops to teach team members how to use the new classification system or to apply the new naming conventions, he was also available to answer questions on-the-fly as they came up. This was helpful because often, questions arose not during the workshops but later as the team members tried to put the new systems into practice. In some cases, the questions that team members raised led to refinements in the system as part of an on-going and iterative process, which would not likely have happened if a consultant had been hired. This opportunity for the embedded records manager to work in close proximity to the QA team in an ongoing and collaborative fashion allowed him to become a more culturally sensitive participant of the organizational reality (Foscarini 2012, 21).

Another benefit that grew out of the close and trusted relationship between the embedded records manager and the rest of the QA team was that neither the records manager himself, nor the other team members, saw his role as being limited to the formal records management job description. In other words, he was considered “not just a records manager” and, as a result, he was willing and able to bring other information professional skills to bear for the overall greater good of the team. For instance, he was able to help other team members become more proficient users of some of their office software (e.g. Excel, Windows file manager). In addition, he used his knowledge of databases and filters to help a team member conduct research more effectively. Finally, he was able to share his knowledge of data visualization techniques and products, which allowed other team members to learn about these and to integrate them into some of their documents and products. While a consultant may have possessed these skills, it is unlikely that either the consultant or the QA team would have thought to work together in these ways. Rather, it was only as a result of the trusted relationship that these opportunities presented themselves, and that all team members felt comfortable pursuing them.

Perhaps the most convincing evidence of the success of this four-month pilot project is the fact that, at its completion, the project was extended for an additional twelve months so that the embedded records

can continue his work with other sectors within the FGPS. Several factors, all with their roots in information culture, were instrumental in achieving this outcome. Firstly, the fact that the records manager had invested in truly understanding the organizational information culture and had already participated in FGPS-wide activities, both professional and social, meant that he had already begun laying the foundations for relationships with these other sectors. Secondly, the positive experiences of the QA team that were spread by word-of-mouth helped to allay any uncertainties that might have existed among those employees who did not fully understand information management and who had expressed some concerns about having their files reorganized or renamed. The positive relationship that had been forged with the senior management, and the Vice-Dean's work as project champion, also helped to garner buy-in from the wider community. Of course, the fact that the embedded records manager had delivered a quality service in a professional manner was crucial, but the added benefits that had been garnered as a result of adopting an embedded model helped to cement the deal.

Concluding remarks

To the best of our knowledge, no other unit on campus has an embedded records manager. However, the literature outlining various libraries' experiences with embedded librarianship was both inspiring and instructive, and it afforded us an opportunity to consider how we might adapt this model in order to successfully embed a records manager within the Faculty of Graduate and Postdoctoral Studies to help bring about a positive change in the organization's records management culture. We fully support the following notion that is prevalent throughout the literature: building strong relationships is the key to a successful experience both for the information professional and for the team into which they are embedded. Based on our experience, we see the embedded model as one that promotes high trust, close collaboration, and shared responsibility for outcomes. It produces a community where the information professional is considered to be a partner and where he or she can make a variety of sophisticated, value-added contributions over and above standard professional information services. Moreover, we agree with Shumaker and Talley's (2009, 45) observation that the embedded service model has a strong foundation and potential staying power.

One potential challenge associated with embedding a records manager into a team is that, as a sole information professional, there is a risk that as ties to the local team strengthen, ties to other information professionals will weaken. Such an outcome is not desirable, but nor is it inevitable if the embedded records manager takes care to retain a strong connection with the records management community, even while building close relationships with the client group. In this case, the embedded records manager actively involved external stakeholders (e.g. the records analyst from the University archives, professors from the School of Information Studies) in the project. Additionally, the FGPS provided time and some professional development funds that allowed the embedded records manager to participate in activities such as the local ARMA conference and the annual conference of the Canadian Association for Information Science.

Kesselman and Watstein (2009, 398) end their article with a call to action: "our intent is to encourage readers to explore new embedded roles for all types of libraries and for librarians in these various settings. Successfully embedded libraries and librarians demonstrate the many ways it is possible to transcend traditional roles and underscore the unique value we add as institutions and individuals." We consider our own pilot project with an embedded records manager to have been highly successful, and we hope this discussion has contributed to a broader understanding of embedded information professionals.

Acknowledgements

An earlier version of this paper was presented at the 44th annual conference of the Canadian Association for Information Science (Calgary, 1-3 June 2016), where it was selected as the best practitioner paper and winner of the Practitioner-to-CAIS Award. We are grateful to the anonymous reviewers whose feedback helped to improve the paper.

References

Buckland, M. (1994), "On the Nature of Records Management Theory", *American Archivist*, Vol. 57, pp. 346-351.

Daum, P. (2007), "Evolving the Records Management Culture: From *Ad Hoc* to Adherence", *The Information Management Journal*, May/June, pp. 42-49.

Drewes, K. and Hoffman, N. (2010), "Academic Embedded Librarianship: An Introduction", *Public Services Quarterly*, Vol. 6 No. 2/3, pp. 75-82.

Foscarini, F. (2012), "Understanding functions: an organizational culture perspective", *Records Management Journal*, Vol 22 No.1, pp. 20-36.

Kesselman, M.A. and Watstein, S.B. (2009), "Creating Opportunities: Embedded Librarians", *Journal of Library Administration*, Vol. 49 No. 4, pp. 383-400.

Myers, G. and Warner, T. (2013), "The Embedded Library: A Marriage Made in Heaven or in Hell?", paper presented at the 34th IATUL Conference, 14-18 April, Cape Town, South Africa. Available at <http://docs.lib.purdue.edu/iatul/2013/papers/34> (accessed 20 February 2016).

Oliver, G. (2008), "Information culture: exploration of differing values and attitudes to information in organisations", *Journal of Documentation*, Vol. 64 No. 3, pp. 363-385.

Oliver, G. and Foscarini, F. (2014), *Records Management and Information Culture: Tackling the people problem*, Facet Publishing, London.

Riccio, H.M. (2012), "Embedded Librarianship: The Library as a Service, Not a Space", *The New Librarian*—a White Paper produced by the American Association of Law Libraries (AALL)/International Legal Technology Association (ILTA): October 2012, pp. 8-12, available at <http://www.iltanet.org/MainMenuCategory/Publications/WhitePapersandSurveys/The-New-Librarian.html> (accessed 20 February 2016)

Rowland, N.J. and Knapp, J.A. (2015), "Engaged Scholarship and Embedded Librarianship", *Journal of Higher Education Outreach and Engagement*, Vol. 19 No. 2, pp. 15-33.

Schulte, S.J. (2012), "Embedded Academic Librarianship: A Review of the Literature", *Evidence Based Library and Information Practice*, Vol. 7 No. 4, pp. 122-138.

DOI: <http://dx.doi.org/10.18438/ebliip.v7i4.17466>

Shumaker, D. (2012), *The Embedded Librarian: Innovative Strategies for Taking Knowledge Where it's Needed*, Information Today, Inc., Medford, NJ.

Shumaker, D. and Talley, M. (2009), Models of embedded librarianship: Final report. Alexandria, VA: Special Libraries Association. Available at <http://www.sla.org/pdfs/EmbeddedLibrarianshipFinalRptRev.pdf> (accessed 20 February 2016).

Sundqvist, A. and Svärd, P. (2016), "Information culture and records management: a suitable match? Conceptualizations of information culture and their application on records management", *International Journal of Information Management*, Vol. 35, pp. 9-15.

Vassilakaki, E. and Moniarou-Papaconstantinou, V. (2015), "A systematic literature review informing library and information professionals' emerging roles", *New Library World*, Vol. 116 No. 1/2, pp. 37-66.

Wright, T. (2013), "Information culture in a government organization: Examining records management training and self-perceived competencies in compliance with a records management program", *Records Management Journal*, Vol. 23 No. 1, pp. 14-36.

Wu, L., Trotter Betts, V., Jacob, S., Nollan, R. and Norris, T. (2013), "Making meaningful connections: evaluating an embedded librarian pilot project to improve nursing scholarly writing", *Journal of the Medical Library Association*, Vol. 101 No. 4, pp. 323-326.