Getting It Right: Outcome-oriented Redesign of a Service Program in a Team-based Management Environment

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The University of California, Irvine (UCI) Libraries have emphasized and valued library instructional services for more than two decades. In the mid-1980's, an Education Services Coordinator position was established to coordinate and facilitate library instruction. Instruction activities were carried out in a distributed manner by public services librarians some of whom had subject bibliographer assignments. The Education Services Coordinator position was eliminated in Spring, 1994 when the UCI Libraries implemented a sweeping, new team-based management organizational structure subsequent to an Organizational Review and Design Project (OR&DP).

Impact of the Organizational Review and Design Project on Library Instruction Services
The new organizational structure created four divisions: Collections and Access Services, Research and Instructional Services, Technical Services, and Administrative Services. The Research and Instructional Services Division (R&I), was to be responsible for "reference, information, and research consultation services and instructional services". The R&I Division, made up of four departments, was further designated by the OR&DP (1) to establish department/site-based instruction teams to provide "site specific, general/lower division instruction"; and (2) to establish a cross-departmental team to facilitate coordination of instructional services for the Division as a whole. The OR&DP also stipulated that "upper division/graduate instruction" was to be delivered in a distributed manner given that subject specialists in the Collections and Access Services Division would also be involved with instructional services. It took five months to establish the sub-structure of thirteen teams for the R&I Division in accordance with the OR&DP recommendations.

Although all members of the department teams and the cross-departmental team for instructional services made a concerted effort to carry out their functions in a team-based environment, it soon became that the de-

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sign envisioned by the OR&DP was overly rigid in its desire to ensure consistency and uniformity across all the R&I departments. Therefore, soon after a formal assessment of the new structure by the University Librarian in Spring, 1995, a year after the OR&DP implementation, the R&I Division undertook a similar assessment effort of its divisional team-based management structure.

Comments from division personnel showed considerable consensus on what had worked well and what needed to be changed based on a year's experience. There was general consensus that there were more leadership opportunities for librarians and staff members and more opportunities to learn new and useful work skills such as problem-solving, conflict management, and meeting management; that meetings had become better organized and more productive; that the team-based environment was more inclusive; that project-based orientation to tasks had increased productivity; and that the process of team participation had allowed clearer appreciation of diverse workings styles and strengths. There were also concerns: too many meetings, teams did not work well for handling ongoing operations such as reference desk scheduling, supervising student assistants who support reference collection stack maintenance functions, or serving as liaison contacts with Technical Services units. More seriously, it was felt that the lockstep approach of identical teams across all four departments hampered more than facilitated their work when every department dealt with very different workload demands and constraints once they moved beyond a basic core of responsibilities.

As a result of the Libraries' overall assessment effort and the R&I Division's effort, the prescribed substructure of department teams was abandoned to allow more flexible and department-centered arrangements. Under the looser interpretation, each department could choose to set up its own project teams and appoint functional coordinators. The cross-departmental Instruction Services Team, however, was the only team retained out of the original thirteen teams. This may be attributed more to the recognition that the libraries needed an administrative structure to provide instructional services than to any acknowledgement that it had worked well. In fact, there were many concerns and questions regarding the purpose and function of the cross-department Instructional Services Team in terms of the mission, vision, and goals of library instruction at UCI.

A more fundamental concern was the bifurcation of general/lower division instruction from subject-based, upper division/graduate instruction. This bifurcation raised an array of management issues. The R&I Division was charged with responsibility for general and lower division instruction; the responsibility for subject-based instruction rested with individual subject specialist librarians. A large number of R&I Division Librarians are also subject specialists involved with graduate instructional functions while other subject specialists were members of the Collections and Access Services Division. How could the cross-department instructional services team be responsible for providing general and lower division instruction services when some of their colleagues choose to be exclusively involved with upper division/graduate instruction? Some of the librarians in the R&I Division were heavily involved with problem-based learning and course-integrated instruction for medical students and residents of UCI's teaching hospital. Lastly, some of the librarians in the Collections and Access Services Division continuously expressed the view that they wanted to be involved in instructional services planning and delivery efforts. Clearly, there was a need to have an open and meaningful dialogue between the R&I Division and the Collections and Access Division librarians. This need was made more significant since one of the outcomes of the formal assessment of the OR&DP was the pervasive concern regarding the structure for instructional services. The two divisional heads—the Assistant University Librarian for R&I (Shirley W. Leung) and the Assistant University Librarian for Collections and Access (Judith Paquette)—were assigned to address these issues.

The AUL's decided to put team-based management theory into practice by inviting all librarians involved with instructional services to attend two half-day working sessions with the Library's team management development resident consultant, George Soete. The goal was to take a grass-roots approach to identifying an administrative structure for instructional services by involving all the librarians who provided instructional services and collecting their ideas, aspirations, and suggestions for an effective instructional services program. The subsequent sequence of events went as follows:

February 29, 1996—Twenty-eight Librarians from the two divisions attended a half-day session held at the end of February, 1996. (This group were subsequently iden-

tified as "Friends of Instruction" or FOI for short.) Facilitator George Soete first provided the opportunity for all the participants to put their concerns and comments on the table. Then he held break-out sessions to brainstorm and prioritize lists of "What could/should we do more of" and "What could/should we do less of". This high-energy and high-participation session resulted in the spontaneous establishment of a fast-track inter-divisional team, made up of volunteers among the participants, to develop a draft conceptual framework and a draft instructional services proposal.

March 5, 1996—The two AULs constituted a four-member Fast-Track Team (with one member serving as facilitator) from the two divisions and established parameters for "Expected outcomes and objectives", "Focus of activity and charge", "Timelines" (one month) "Decision Points", and "Constraints".

March 28, 1996—Deadline for the Fast-Track Instruction Team to deliver its draft report to the FOI.

April 2, 1996—Mr. Soete facilitated a second forum for the FOI to gather feedback on the draft report by the Fast-Track Instruction Team.

May 10, 1996—The Fast-Track Instruction Team submitted its final report which contained five main components:

I. *Conceptual Framework*: This section discussed the Vision, Mission, Scope, and Goals of the program and included four objectives:
- Improve Library Instruction Across the Curriculum
- Improve Lower-Division Library Instruction
- Improve Upper-Division Library Instruction
- Support Graduate-Level and Faculty Instruction

II. *Instructional Services Program Proposal*: The Instructional Services Program Proposal discussed building blocks, campus partnership targets, and internal library partnerships such as the Library's Learning Team.

III. *Functional Description*: The function of the Instructional Services Program was to:
- provide Instruction;
- support Instruction;
- evaluate and improve instruction;
- create and maintain partnerships.

IV. *Elements for Success*: The Elements for Success section listed the resources and other environmental factors needed to make an instructional services program successful.

V. *Instruction Program models*: The Fast Track Instruction Team proposed four models for the administrative structure of the Instructional Services Program for consideration by the AULs.
- Model A: An instruction unit with assigned personnel including a unit head.
- Model B: An Instruction Officer/Coordinator who would work with a group or team of assigned personnel.
- Model C: An Instruction Team made up of an assigned instruction librarian within each R&I department and a subject librarian from the Collections and Access Division.
- Model D: Retain the current cross-departmental Instruction Team.

After extensive review of the Fast Track Instruction Team Report and the information generated in the two working sessions with George Soete, the two AULs presented a Model for the UCI Libraries Instruction Program in a report dated July 1, 1996. The report was the result of probing discussions on the pros and cons of each model, the overall resources needed for the implementation of each model and the perceived impact of implementation on the extant organizational structure in a team-based environment. The need for a strong evaluation/assessment component became clear as well as the need to implement a program that was resource-efficient and in consonance with the library's team-based management philosophy.

Administrative Model for Instruction Services at the UCI Libraries
The model selected and implemented was to provide an Instruction Services Librarian (IS Librarian) working with an instruction services team. The Instructional Services Team (IS Team) was specifically designated as a working team, not an advisory team with the IS Librarian serving as the team leader. The report went on to detail other aspects of the administrative structure of the program.

Duration and Focus of the Program
The program was implemented for a two-year pilot period which began upon the appointment of the Instruc-

tion Services Librarian in October, 1996. Based on analysis and assessment done and experience/data gathered during the two-year period, the program model and conceptual framework was to be reviewed and redesigned, if necessary.

Staffing Structure
The Instruction Services Program was staffed with an FTE librarian. In addition, the program was allocated 15 hours a week of clerical support to assist with operational functions such as room reservations, confirming instruction session schedules, and distribution of instructional materials.

Budget
Beyond the allocation of FTE, the program was given a budget allocation to support basic expenditures such as supplies and photocopying.

Reporting Line of the Instructional Services Librarian
The IS Librarian reported (and continues to report) directly to the AUL for the Research and Instructional Services Division.

Role of the Instructional Services Librarian
The AULs' report specified that the IS Librarian would work four hours per week on a general reference desk in order to stay in touch with user needs and information inquiry/use patterns. She was directed to consult, communicate and coordinate with the AUL for Collections and Access regarding subject-based instruction services. The IS Librarian position was designated as the key contact person for instructional services related matters with campus and off-campus units. In addition, the IS Librarian served as the Team Leader of the Instruction Services Team.

Membership and Function of the Instructional Services Team
With the IS Librarian as team leader, the IS Team was designated as the primary planning and working team for library instruction with membership composition as follows:
  • a member from each of the four Research and Instructional Services Departments (Main Library, Government Information, Science Library and Medical Center Library).

  • a Library Systems Department member appointed in an ex-officio capacity as the technology resources person for the team.
  • at least one member of the team would also be a bibliographer, from the Collections and Access Division if possible (to ensure communication about subject-based instruction).

Identification and Appointment of the IS Librarian and the IS Team Members
The IS Librarian was appointed through an open internal recruitment process. The IS Team members were chosen by nomination or by volunteering to serve on the new Instructional Services Team.

Key Responsibilities of the Instructional Services Program
The Fast Track Instruction Team report identified areas of responsibility for the Instructional Services Program. The AUL report dated July 1, 1996, endorsed and prioritized key activities for the IS Program and the IS Team. (See appendix 1: Priority Ranking of ISP Activities) The key responsibilities were to provide, coordinate and support general instruction, library-based instruction and outreach instruction; to evaluate and improve instruction and to create and maintain partnerships with units within the library and on the campus, particularly in those areas which dealt with undergraduate education. In addition, the IS Program was charged with supporting subject-based instruction. One of the chief tasks given to the IS Program was the development of a strong assessment component to evaluate the effectiveness of the program offerings and the effectiveness of the program structure. (See appendix 2: ISP Activities Status Grid for a full listing of ISP activities)

The reconfigured Instructional Services Program structure was implemented in October, 1996 with a full-time Instructional Services Librarian acting as team leader for a seven member Instructional Services Team.

Assessment of the Two Year Pilot Period
The accomplishments of the Instructional Services Program were significant during the two-year pilot project. Activities fell into three categories: ongoing activities, new initiatives/partnerships, and evaluation activities.

Ongoing Activities
The Instructional Services Program (ISP) continued to

coordinate general library and lower-division instruction and to provide library-wide and administrative support for the Libraries instruction efforts. The IS Librarian served as the campus contact for library instruction and acted as a resource for the improvement of teaching within the Libraries. With the assistance of the IS Team members, the curriculum of library-based classes was standardized and updated to reflect the changing complement of library resources.

New Initiatives/Partnerships

The IS Team designated the first year of the pilot period as a "Focus on Teaching Year". A variety of activities designed to improve and enhance the instruction provided by UCI librarians took place under this rubric. These activities included workshops, discussion forums and mini-seminars open to all librarians and library staff members who provided instruction.

During the two year pilot period, the Instruction program formed significant partnerships with campus units outside the library. The library was invited by the Division of Undergraduate Education to participate in a successful NSF grant application designed to improve undergraduate education in the areas of Science, Mathematics, Engineering, and Technology (SMET). In addition, the library also played a key role in a campus-wide initiative to develop an Electronic Educational Environment.

Evaluation Activities

The ISP was charged with three evaluation activities that were designated as critically important. The activities were to 1) conduct ongoing evaluation of the instruction program for continuous improvement and relevance to current needs, 2) conduct ongoing evaluation of instruction program participants (librarians), and 3) create statistical and narrative reports.

Assessment of the Administrative Structure of the ISP during the Two Year Pilot Period

The pilot period for the administrative structure of the Instructional Services Program covered October, 1996 through October, 1998. Many changes occurred in the upper administrative levels of the UCI Libraries during this time. One University Librarian retired, the former AUL for Research and Instructional Services acted as University Librarian for a year and then accepted a position in Hong Kong, a new University Librarian was hired

and an acting AUL for Research and Instructional Services was appointed on an interim basis. Due to the numerous changes in library administration, the planned assessment of Instructional Services has not progressed as originally envisioned. A draft report is under review by the Acting AUL for R&I who will present it to the senior administrative team.

An Informal Summary of What Worked Well

From a practitioner's perspective, many aspects of the ISP worked well during the pilot program. Perhaps the biggest benefit was that the attention and focus on instruction created new enthusiasm and energy for the library teaching efforts. All instruction librarians had opportunities to reflect on their teaching experiences, to share their experiences with other interested and supportive colleagues and to learn and practice new instruction techniques. The make-up of the instruction team facilitated information sharing about instruction across all departments and units. Team members were able to report back to their units about instruction initiatives, needs and projects. In addition, team members were able to provide a variety of perspectives on instruction issues. Reporting to the AUL for the R&I Division, gave the Instruction Librarian a direct line of communication and facilitated information sharing about and resource allocation for instruction initiatives.

One area that improved significantly during the pilot project was the method for collecting statistical data about instruction. The data collection process was streamlined and standardized so that all librarians and unit heads had a clear understanding of what information was being collected and how to report it in a uniform fashion. For the first time, the library has reliable and meaningful data to help inform the allocation of resources to instruction. The ISP can generate detailed and accurate statistical reports on instruction activities by individual librarians, by schools and programs, and by academic discipline. The statistics gathered have helped identify underserved student populations and to target them for library instruction in the future.

The ISP made notable progress in the controversial area of evaluation of instruction. All Library-based classes routinely include an evaluation by participants and significant progress has been made toward designing an evaluation instrument for use in all classes taught by librarians. The issue of how to evaluate the performance of instruction librarians is still outstanding.

New partnerships and new initiatives gave campus-wide visibility to library instruction activities and the library's role in the academic and instruction mission of the University. In addition, the library was able to identify new avenues to ensure that all students had the opportunity to acquire both baseline information literacy skills and more advanced academic research skills in their disciplines.

An Informal Summary of What Could Have Worked Better

Although the ISP structure implemented was successful in many ways, there are some areas that need adjustment. The IS Team worked well as an advisory body, but did not function as a working team as originally envisioned. The intent was that IS Team members would serve as a core of instructors for the ISP classes. This did not happen. IS Team members continued to participate in instruction at the same levels and in the same areas as they had prior to their appointment to the team. There is not a library-wide standard for level of participation in the instructional service program classes. Although the library is able to meet current demands for instruction, it has proven difficult to expand instruction efforts because of personnel constraints.

Reporting directly to the AUL for R&I had benefits, but there were drawbacks as well. The structure did not enable close communication and coordination between the IS Librarian and other library managers and officers because the IS Librarian did not participate directly in management activities such as budget and goal setting meetings. Instead the AUL acted as the sole advocate for instructional services during management meetings.

These areas and others are currently being considered in the formal assessment of the Instructional Services Program at the UCI Libraries.

The IS Librarian's Assessment of the Process Used to Create the ISP Model

The process used to create the ISP model worked well in many ways. It was participative and inclusive. All interested parties had multiple opportunities and avenues to express their opinions and ideas. Because it was open-ended and value and judgement neutral, the process encouraged creative approaches to long-standing issues. The process itself focused attention on instruction and served to validate the importance of instruction as part of the UCI Libraries mission. In addition, resources were allocated to the creation of the model and to the program.

Some aspects of the process did not translate well when the senior administration underwent significant changes. The Fast Track Instruction Team Report identified issues, concerns and activities which fell under the auspices of Instructional Services. The AULs' report provided a context and endorsed ISP activities by assigning priorities to the issues, concerns and activities identified by the Fast Track Instruction Team. The IS Team was then free to set its own goals and objectives. It is safe to say that everyone who was involved in the process from the beginning had a shared understanding of desired outcomes for the ISP. However, personnel changes at the senior administrative level meant that those responsible for assessing the instruction pilot period had not been active participants in its design and implementation. The perceived lack of a formal charge or measurable goals presented challenges to measuring the performance of the IS Program.

The AUL's Assessment of the Process Used to Create the ISP Model

The process established to invite the full participation of all librarians involved with instructional services worked very well. It provided the opportunity for everyone to share their views on what was important, what should be given higher priority, and what should be given more attention. Through the facilitation of the consultant, the discussions stayed focused. Such accomplishments were not incidental. In fact, the two AULs had discussions with the consultant on the desired outcomes prior to the first FOI forum. However, the spontaneous formation of a small group to develop an instructional services program was not anticipated by the two AULs. They quickly supported this outcome given the participant's intense interest in forming such a group.

In order to ensure that the small group (later named the Fast Track Instruction Team) would accomplish desired objectives, the two AULs worked closely together to develop a very specific charge to the Team stating expected outcomes, focus of activity, membership, assigned facilitator, reporting relationship, timelines, decision points, and constraints. The detailed and careful attention given to the development of the charge for the Fast Track Instruction Team laid the foundation for the team's effectiveness.

A different approach was used with the Instructional Services Team formed later to be a working team in conjunction with the establishment of the Instructional Services Librarian position. The two AULs decided that it would be important to allow the team and the Instruction Services Librarian latitude to shape and determine their work within the established conceptual framework. In other words, a conscious effort was made not to give the same kind of specific directive to the (working) Team and the Instructional Services Librarian. Clearly, much has been accomplished in the ensuing two years. However, this may be more a result of the work by librarians with strong interests in instruction services than as a result of the team structure.

From an administrative perspective there was a major difference between the charges given to the Fast Track Instruction Team and the charges given to the IS Team.

The Fast Track Instruction Team operated as team with a very specific charge whereas the Instruction Services Team was expected to function as a self-managed team.. They may appear to be very similar, but in fact they are vastly different.

Conclusion

This paper describes an academic library's effort to promote organizational agility by using a fast-track team-based management process to re-design an important library service program. The process used was inclusive, creative and facilitated by a professional library management consultant. Although there are still some areas which need clarification and adjustment, the overall assessment is that the process resulted in an effective administrative model for the delivery of the Libraries Instructional Services Program.