

# Reorganization: The Next Generation

*Rhoda Channing*

Library reorganizations are difficult, time consuming, and evoke in staff a fear of change exacerbated by the knowledge that the change will not be an abstraction, but something that will directly affect their lives and jobs. Existing job classifications and descriptions, and perhaps even salaries, are in question when the library embarks on a reorganization, and there are, inevitably, winners and losers. After a library goes through a major reorganization, however thoughtful the process, however participatory it was, and however well staff understood it, once it has been implemented there is often the feeling of "Well, that's over and now we don't have to think about it any more". There is relief and a return to the emphasis on activities in the immediate work unit or team. If we think seriously about the reasons we reorganize in the first place: rapid change, the impact of technology on our operations and collections, budget imperatives, or other motivators, we will recognize the need to put in place a mechanism for regular assessment, reality checks and review. Implementation does not mean the end of a reorganization effort, merely round one.

I'd like to share with you a brief history of our reorganization effort at Wake Forest's Reynolds Library, setting it in the context of the university, and then describe our process of reassessment and continued change. Let me provide a thumbnail sketch of the university and the library.

Wake Forest University is a private liberal arts university in the Piedmont area of North Carolina. It is small in size, but large in other ways, and with only 3800 undergraduates, boasts inclusion in *US News & World Report's* list of the top national universities, a peculiar categorization for our little institution. In 1995, Wake Forest University developed and implemented a major plan for the class of 2000. It had several elements, including adding 40 new faculty positions and requiring first year seminars, but the element that attracted national attention was the technology plan. In partnership with IBM, we began to give all freshmen IBM laptops, later adding color printers. Another element of the very complex plan included replacing the laptops and the software for students after two years. Faculty were also to receive new machines on a 2 year cycle, and the library was given the huge new responsibility for computer orientation and training.

The Z. Smith Reynolds Library is one of three Wake Forest libraries, each with separate governance, the other two being the Carpenter Library, serving the medical campus, and the Professional Center Library, serving the graduate law and management schools. Reynolds serves the College of Arts and Sciences, the Calloway (undergraduate) School of Business and Accountancy and the Graduate School of Arts and Sciences, which offers sev-

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eral masters' programs and Ph.D. programs in the Sciences. With a budget of \$5 million plus, over 1 million volumes in print and large microfilm and electronic research collections, the Reynolds Library offers much more support than the average library serving such a small population. The staff has had little growth, numbering 54 positions although some were added as a result of the new responsibilities. Like many academic libraries we rely heavily on student workers and have about 150 students on the payroll as well.

I undertook the reorganization of the Reynolds Library after several years of waiting for the opportunity and the right moment. They converged when one of my assistant directors left to become a director, and when the library was given the new charge to train the first year students in the use of their computers. Figure 1 shows the organization chart I inherited as of September 1989.

It was a bit odd, as Technical Services included Automation, Cataloging and Circulation, and the Reader Services Division included Reference, Collection Development, and Acquisitions. The two Special Collections departments, and the Information Technology Center, created in 1992 following our building addition project, reported directly to me.

There were many reasons to consider reorganizing. From a purely selfish standpoint, I needed someone to monitor budget information very closely, handle admin-

istrative paperwork, keep up with facilities issues, and initiate systematic staff development. My own responsibilities on campus but outside the library were taking much of my time, and my own efforts in day to day administration were not enough to accomplish my goals for the library. I also wanted to see more synergy, the development of processes that were unhindered by departmental boundaries, and the strengthening of leadership skills among our librarians and other managers. Our library had undergone many changes, an addition and renovation project, automation, introduction of approval plans and many other new activities since my arrival. I had done some tinkering with the original chart, combining some units, but basically we were the same organization.

In the fall of 1995 we began a thorough yearlong reorganization process. With a Steering Committee, representing all areas of the library with professional and support staff, a Technology Task Force, a Work Processes Task Force and a Communications Team, we revised our mission statement, developed alternative future scenarios, identified gaps in our processes, and kept the entire staff informed. We had a daylong retreat with a facilitator to do scenario building, based on Marvin Weisbord's work *Future Search*, read much of the literature about other library reorganization processes, and met with focus groups of faculty and students. We set

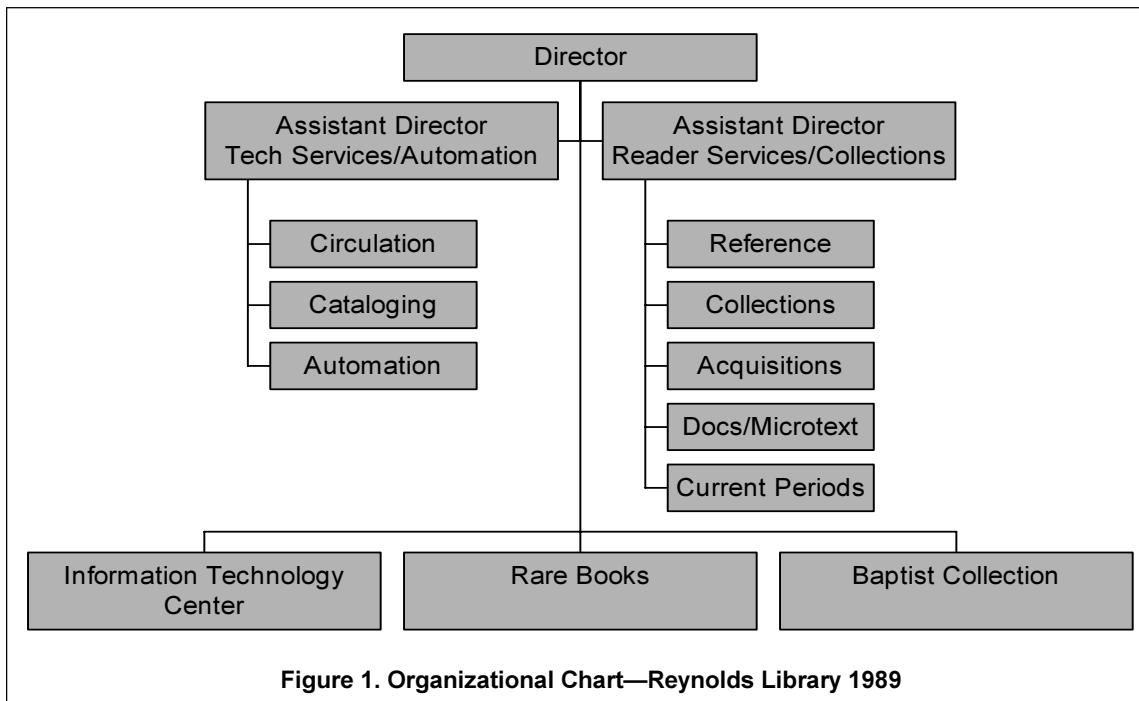
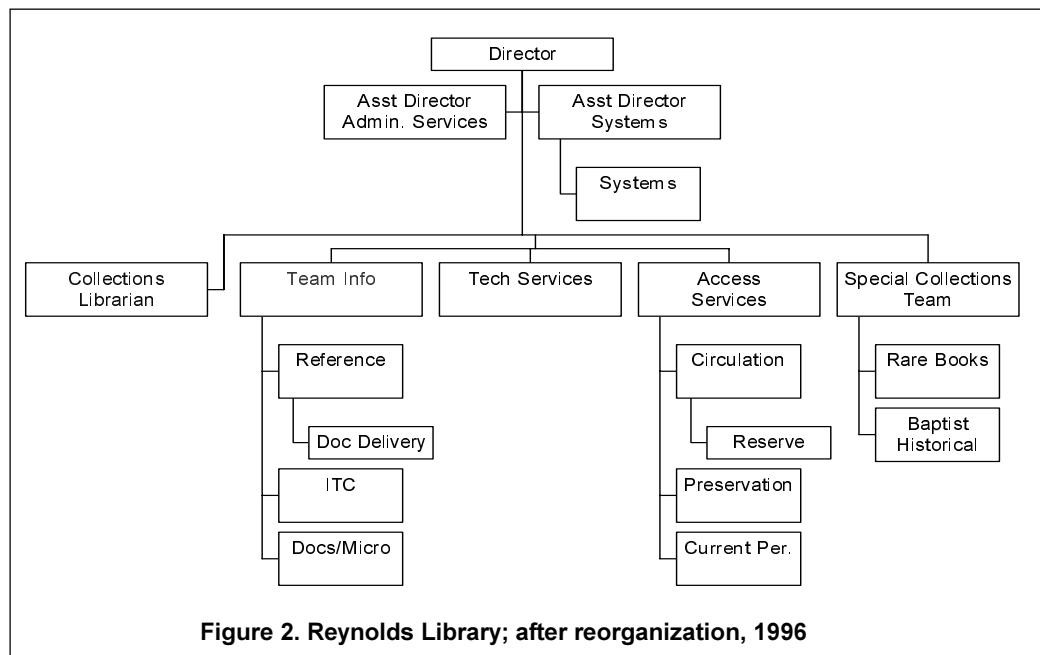


Figure 1. Organizational Chart—Reynolds Library 1989



up an anonymous communication system for staff so that we could deal with their concerns. Many staff members came to talk to me individually to voice their opinions. At general staff meetings we made sure to update our staff on what was happening behind closed doors. We debated all kinds of changes from peer review and upward evaluation to rotating Team Leaders, to eliminating departments altogether. We reached consensus, and put the organization chart shown in figure 2 into effect in July of 1996.

The new organization eliminated the two line assistant directors, substituting an Assistant Director for Administrative Services, and Assistant Director for Systems. Both were to be essentially staff positions, although the A.D. for Systems would supervise the Automation librarian and a technician. There would also be a Collections Librarian, another staff position. The rest of the staff would be divided into four teams: Technical Services, eliminating separate acquisitions and catalog departments, Access Services, which includes Circulation, Reserve, Current Periodicals and Preservation, Information Services which promptly rechristened itself TeamInfo, including Reference, Document Delivery, the Information Technology Center and Government Documents and Microtexts. The fourth team was Special Collections, consisting of Rare Books and Manuscripts, Archives and the Baptist Historical Collection. The major training function involved staff from all teams in the library, over 20

people, coordinated by a Task Force chaired by the Director. Collection development was organized using the department liaison model and also included people on all the teams, coordinated by the Collections Librarian. Our reorganization plan called for three of the team leaders to be appointed by the director and to rotate every three years. The Technical Services Team leader was made a permanent position, in part because the Technical Services Department and the team were identical. Team leaders received an extra stipend of \$2,000 per year. In addition to the teams, there were to be a number of library wide committees, such as publications, policies and procedures, statistics, staff development, etc. All the teams were to be coordinated at the Administrative Council level. The Administrative Council included the Director, Assistant Directors, Collections Librarian, Team Leaders and an elected representative of the support staff. This group would meet monthly, with the teams meeting more frequently. To reflect the changes in our expectations and in the work, we conducted a thorough review and rewrite of all staff position descriptions and secured salary and classification adjustments totaling \$120,000 to the payroll. Not all staff were affected by the adjustment processes, but more than half were.

In addition to my selfish goals for the reorganization, we had identified increased customer satisfaction, for both internal and external customers, as the measure of effectiveness. Although that is hard to measure,

we had senior surveys and a web-based faculty survey administered in the 1997–98 academic year which indicated we were doing well. From 1996 to 1998 we worked within our new organizational structure, formed some of the new committees and generally put structural issues and structural change at the back of our minds as we became involved in the ongoing progress of our work. We had workshops on teamwork and related topics for staff to aid in their transition to the new behaviors we wanted to encourage. I had some feedback from our staff, especially the Team Leaders, but nothing that was systematic or comprehensive. Then in the beginning of calendar 1998 we began a formal review of our reorganization.

We formed a Reorganization Review Committee, made up of some of the original steering committee members, again including support and professional staff from the different parts of the library. We went over the original report. We had discussions as a committee and met with each team, with some departments and with individuals in a series of scheduled “hearings.” Before meetings we sent out a questionnaire asking the following:

- How has reorganization changed your work processes?
- How has reorganization changed your communication within the library?
- How is a Team Leader different from a Department Head?
- In what ways has the reorganization met, or not met, your expectations?
- What do you see as next steps or objectives to be addressed by the library?

We found that it is difficult for some people to identify cause and effect, and there were many vague replies to the first question. Much depended on the team. For example, Technical Services had made great changes in the work processes and physical layout of the workplace, but some of the other teams didn't see much change or change attributable to the reorganization. Most staff agreed that there was more and better communication within teams, but felt that more needed to be done to improve communication across team boundaries. There was lots of confusion about the role of the Team Leader vis a vis the Department Heads. Some of the confusion was from the Team Leaders themselves! Although by eliminating line assistant directors, I thought we had flattened our organization, several individuals experienced

the change as adding hierarchy. The individuals who were parts of teams, but not Team Leaders, no longer reporting directly to me expressed that perception. Few staff members were able to articulate their expectations for the reorganization, but did believe that they were working more collegially and making the decisions related to their work. They pointed out some of the areas in which clarity was lacking, and others in which we had yet to implement the committees or structures. The rotation of team leaders was and continues to be a sensitive subject. The first team leaders were all department heads, but the position is not restricted to department heads, and, jumping ahead of myself a bit, in the next rotation, beginning July of 1999, two of the Team Leaders will not be department heads. In Access services, there was another issue. As there is only one professional, the new team leader would come from outside the department. I am not yet proposing to have a support staff member coordinate the work of a professional librarian. After the one professional retires, in about three years, we may have no professionals in Access Services, and that will require another look. We will make a decision then.

Other issues that arose in our review included the reluctance of the Reorganization Review Steering Committee, the Team Leaders and Department Heads to move toward peer review or upward review. Every academic library exists in a broader context, that of the parent institution. Wake Forest is an anomaly in a number of ways: librarians are classed as administrative staff, and administrative staff are not evaluated! Only support staff are evaluated annually. One could ask if it is reasonable to expect anyone who does not have to be reviewed to submit to having his or her work evaluated. In general people dislike being judged, and the value of performance appraisal in improvement of performance is dubious. Yet I felt, and still do, that for teams to be effective, there must be a level of trust that permits both peer review and upward review as well as the traditional review by supervisors. I started the ball rolling when I asked the members of the Administrative Council to evaluate me anonymously, and then met with the whole staff to discuss the outcome. I would like to pursue this as part of regular pulse-taking.

Life happens, while we are making plans, and in November of 1997, the Assistant Director for Systems left, prompting a long look at the way we organize, or manage, our technology functions. We had identified many different technology roles that needed someone

Budgeting	Hardware	Liaison to IS	Data Migration	Networks
Software	Printing	Website	Training	Multimedia
Digitizing	OCLC	User interfaces	Library systems	Y2K
Electronic Resources	Office Processes	Programming	Administrative applications	CD and other technologies

Figure 3. Technology roles.

to coordinate efforts by individuals in each team (see figure 3).

Although there is a large IS operation on campus, there are still many things that the library chooses to do, or is expected to do for itself. Library Staff are also heavily involved in software testing and documentation for the university in relation to our training responsibilities. It was easy to identify a core of employees whose jobs were primarily concerned with technology, well beyond the boundaries of the two people in the systems office. The Information Technology Center staff, the technician in the Reference Department, and the systems staff spent most of their time on the tasks outlined above, but the Director, the Assistant Director for Administrative Services and people in several departments also were heavily involved in the technology challenges. Our solution was to form a technology team, put systems, the ITC, and the technician from reference in it and have others representing administration and all the other teams participating at varying levels. Pending the hiring of a new team leader, we have the head of the ITC acting in that capacity. Thus our latest chart (see figure 4).

We are finding that our relationships and work extend beyond our boundaries. Collections projects involve the state and sometimes the region. Our systems projects involve IS and the other university libraries, as well as registrars, controllers and vendors, and so many of our efforts require teamwork at all levels of the organization that we must remain flexible as organizations. This means that several people, not just one or two, must be empowered to speak for the library, and must be knowledgeable beyond a specific task. Our structures must support and encourage this, and if they don't, must be altered.

Our experience, at Wake Forest, indicates that some staff seek to be directed, others seek self determination, and still others, movers and shakers, seek to influence others. No structure or organization chart perfectly

slots staff according to their abilities and desires, but if we can be flexible, use freer structures, whether teams or something else, we may allow more people to contribute at their highest level. We need to have a process in place to take our organizational pulse at regular intervals, and to make course corrections.

As our October 19, 1998 Reorganization Update suggests:

- *Communication and coordination still seem to be goals for continuous*
- improvement, and continuing staff development will inevitably lead to
  - increased staff involvement in decision making at each appropriate
  - level. This is already happening and must be encouraged and supported
  - by supervisors and team leaders.

In July of 1999, three or four new team leaders will replace existing ones, bringing their fresh perspectives to the coordination of library activities, and getting opportunities to develop greater skills in facilitation and management. Stay tuned!

