When Interdependence Becomes Codependence: Knowing When and How to Let Go of Legacy Services

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Introduction

Almost twenty years into the digital revolution that has transformed our society, no one can really claim to fully understand the changes that are radically reinventing the information environment. While information and service providers such as travel agencies and newspapers are scrambling to find new roles and new identities to remain in business, academic libraries have been, in many ways, following an awkward middle ground. Librarians are always proposing and adding new services, but not always critically examining existing realities in light of our missions, and letting go of obsolete or less useful programs. Given the current economic climate, libraries can no longer afford to maintain the status quo.

Through case studies of legacy interlibrary loan practices, this paper will examine the concept of organized, or planned abandonment in light of library services. By applying the ideas put forth by Peter Drucker, Frances Hesselbein and others, we will model a framework to critically assess existing services and thoughtfully plan for the future. Planned abandonment means examining and possibly ending the services that brought a library success in the past and, instead, continually establishing new means of being relevant to our campus communities. Often our "tried and true" services and ways of reaching patrons are no longer useful, and by tying up staff time and resources, they can be an impediment to innovation. Or as Stoffle, Leeder and Skyes-Casavant state in their article, *Bridging the Gap: Wherever you are, The Library* "Giving up the less successful services allows for a reallocation of funding and staff time into services that would better meet the needs of our communities, and use funding more efficiently." [1] We like doing what we know, and it is difficult to understand the need for change. Through the use of planned abandonment strategies grounded in assessment- based decision making, libraries can consciously focus on what we can and must do well, and start the process of choosing what services to let go. As we will discuss throughout this paper, the process must be context sensitive and requires careful communication and follow through from all levels of library management.

Planned Abandonment in Libraries

A review of the library literature conducted by the authors returned very few results concerning abandoning services. Hardly any libraries and librarians have openly embraced the idea of planned abandonment and the ones that have, have tended to focus on applying these ideas to internal operations such as reorganizing staff structure [2], developing needed skill sets, competencies and external communication strategies for the future [3], or an analysis of drivers of change and vision for successful future.[4] And although there are

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mentions as far back as 1994 [5] of the late Peter Drucker's ideas and their possible application to libraries to date there have been no actual case studies presented on the abandonment of a legacy service.

There are many reasons why librarians do not adopt planned abandonment and most of them are based on assumptions, emotional responses and a general discomfort with change. Donald Gilstrap proposes that although maintaining old and new ways of doing things may allow libraries to avoid facing the anxiety of "endings", not adapting planned abandonment may heighten these anxieties by not allowing the librarians to create "new beginnings" with less confusion and the stress of maintaining too many services and systems [6] Librarians are often comfortable with adding new services but are much less comfortable with taking anything away. While books such as *Discovering Librarians* delve into the personality traits of professionals in the field, the research doesn't give insight into librarians' relationship to change.[7] Additional research, similar to Gilstrap's study on the specific emotional challenges that librarians associate with change, is needed in order to fully understand why as a profession we have such ambivalent feeling about change. As a profession are we conflict adverse, or simply nostalgic for the past? Questions raised by studies like Gilstrap's seem at odds with the fact that as a profession we have radically adapted the way library services are accessed and delivered in the past twenty years. Nevertheless these are all issues for further study, to examine the librarian as person and our individual responses, not just the library as whole.

While librarians haven't adopted Drucker's idea of systemized, organized abandonment, it has been a staple of the business literature for years [8]. Many academic librarians are rightly skeptical of borrowing ideas from business literature. Often such writings are full of jargon, and not fully applicable to a higher education setting. But when we do pause to review Peter Drucker's work, the relevance of his writings to libraries is clear. Drucker has been called the "The Father of Management" and was one of the greatest management thinkers in the twentieth century[9]. In a 2003 interview, Drucker stressed that innovation isn't "something one can add to a static organization." He went on to state that the "first requirement" of being an innovative organization is to embrace "organized systematic abandonment." [10] In Drucker's 1999 book, *Management for the 21st Century*, he famously challenged managers to ask the following question of all services and products: "If we did not do this now, would we, knowing what we now know, go into it?" Drucker states that if the answer is "no," the response should not be "let's do another study," the response should be "what do we do now?" [11]. Frances Hesselbein, former CEO of the Girl Scouts of America and a Drucker protégée, challenges leaders to identify and "discard what no longer works" to ensure that services and organizations are relevant for the future. [12] While Drucker emphasizes constant program review and Hesselbein places more stress on programming relevancy, both writers agree on the need for examination, for action, for addressing what we do now if services no longer make sense.

Indeed, "what do we do now" will be the central theme of this paper, and is arguably the most important question facing many librarians today. But while the concept of planned or organized abandonment applies throughout an enterprise, Drucker states that it has "particular force" for distributors and distribution channels, as distribution channels change more quickly than anything else.[13] Interlibrary loan in academic libraries is a key distribution channel for scholarly communication, but many of its legacy delivery mechanisms have been targeted in recent presentations as "clunky" at best.[14] Given Drucker's emphasis on distribution, and our own experiences, the authors brought Drucker's concepts to bear on interlibrary loan operations in our libraries.

Background

At the time of our study, both authors were working at undergraduate liberal arts colleges in Pennsylvania, Mary at Gettysburg College and Katherine at Lafayette College. Both schools have a similar undergraduate profile; both use the same library ILS system (Innovative Interfaces) and both provided two methods of interlibrary loan for patrons. The first method, traditional OCLC interlibrary loan, is facilitated by ILLiad software. The second, E-ZBorrow, is a patron initiated requesting platform, exploiting resource sharing agreements through the Pennsylvania Academic Library Consortium (PALCI) and using URSA software for direct requests. Neither library places any meaningful limits on patron ILL activity, nor do they pass on charges to patrons.

The authors initially began the process of collaboratively analyzing interlibrary loan services during a

PALCI consortium meeting in the summer of 2008. While comparing notes on services, priorities, and management philosophies, we quickly realized that working at very similar institutions would give us the opportunity to share information and evidence gathering techniques as we critically examined services in our individual libraries. While our campus cultures were different, we recognized that our similarities meant we could work together to make the process easier. In our initial conversations, we may not have been using Drucker's framework, but we quickly discovered that Drucker's ideal of organized, systematic analysis of service was an important tool when making innovative change in our organizations.

Case Study: Lafayette College

When E-ZBorrow was conceived and rolled out between 1999-2001, it was a true innovation in real-time user-initiated interlibrary book borrowing. The idea of a Pennsylvania library federation built around user-initiated borrowing was conceived in a meeting at Lafayette College, and the idea grew into the PALCI consortium. But by 2008, a change in compatibilities and new charges from Innovative Interfaces meant that Lafayette's cost for participating in E-ZBorrow was projected to more than double for the next fiscal year, an insupportable increase given the fiscal climate. The E-ZBorrow resource sharing software had not had an upgrade since a 2001 release, and many other changes had altered the nature of the resource sharing climate. Work by talented systems librarians at Lafayette had created a seamless patron discovery and request process from our many databases into the ILLiad requesting system, but there was no way to replicate that seamless patron experience in E-ZBorrow. Changes in OCLC's products and the implementation of ILLiad had drastically streamlined staff processes for traditional ILL. It was clearly time to ask the question—should we abandon one of the two duplicate services? While some faculty and librarians perceived E-ZBorrow as a vital service, was it really still a necessary, effective and useful tool?

Our first step in answering the question was to gather evidence and critically assess the E-ZBorrow service using Drucker's planned abandonment framework. We already knew that for most years, Lafayette College had been a net lender in the PALCI consortium, but volume was not a decisive issue. In the spring of 2009, we decided to identify what the decisive issues should be. The selling points for PALCI were always turnaround time, ease of use for staff and fill rate. Our first point of analysis would be the advertised strengths of the service. What we learned when we really looked at the numbers:

- Turnaround time OCLC ILL turnaround time for PALCI libraries in 2009: 5.38 days; PALCI system wide turnaround time in 2009: 5.27 days
- Ease of use: Staff reported that with our streamlined ILLiad implementation, processing traditional ILL books was actually easier than processing PALCI books.
- Fill rate: At Lafayette, in 2008-2009 the fill rate was about the same for E-ZBorrow and traditional ILL (87 vs. 82 percent). Traditional ILL fill rate for PALCI schools was 99%

Ten years after its initial implementation, the E-ZBorrow service was clearly not living up to its selling points. While the service had made a great deal of sense when implemented in 1999, the ILL landscape had changed significantly since then, and it no longer served a revolutionary purpose.

When we analyzed our costs, we realized that we were always net lenders in PALCI, so our shipping costs would decrease if we dropped the service. Given OCLC's move to subscription pricing models and Lafayette's volume in the tiered system, our analysis showed that OCLC and ILLiad fees wouldn't increase appreciably. As members of LVIS and Oberlin and many other "free" consortia, projections showed that our ILL fee management numbers wouldn't rise. Given the numbers and our analysis, it looked like dropping PALCI E-ZBorrow would not increase any direct costs, and might even save some money. The process was quickly pointing to the fact that a planned, organized abandonment of a duplicate service was in order. When we stepped back from our day-to-day processes, and asked Drucker's question, we answered "no, given the chance to do it again, we wouldn't do it now."

But in a liberal arts college library, the thing of paramount importance isn't always numbers, or even logic—the most important thing is patron satisfaction, and ultimately, faculty satisfaction with library services. We discussed dropping the service with our faculty advisory committee, and analyzed the service at great length. While we knew from a 2007 MISO (Merged Information Services Organizations) survey

that patron satisfaction with interlibrary services in general was high, we had no way of knowing if that satisfaction was with E-ZBorrow or traditional OCLC ILL. When the decision was announced in May of 2009 that we were dropping E-ZBorrow, the only response was two email regrets from high-use faculty members. We were actually upset that we didn't get more negative responses from our community. The only true complaints were from a few savvy international students who work for the library and were upset because they used to be able to order textbooks through E-ZBorrow.

A follow up of the MISO survey in 2010 revealed that levels of patron use and satisfaction were relatively unchanged; dropping E-ZBorrow had no appreciable impact on survey results.

While it initially seemed counter-intuitive to drop a resource sharing solution in difficult economic times, the analysis and results at Lafayette proved the decision to be right for our situation. Further analysis is pointing to the need for even more change. Lafayette's library is placing more emphasis our existing purchase on demand program, and continuing to develop our eBook collection for immediate patron access to texts.

Case Study: Gettysburg

Many similarities exist between the environment in which E-ZBorrow service originated and grew at Lafayette and Gettysburg Colleges. In 2008, the same budgetary and technological challenges were facing both institutions, however, Gettysburg was also undergoing some major staffing and organizational changes. As the new release of E-ZBorrow was delayed, and some of the promised cost increases from III reconsidered, Gettysburg took advantage of the temporary reprieve and continued using the E-ZBorrow service for the 2009-10 academic year. Building on the analysis shared by Lafayette, which had been mostly focused on a Drucker-style budgetary and program review, Gettysburg turned its focus on Hesslebein's challenge of relevancy. The key questions posed by Gettysburg's librarians centered on how current research methods were changing the way patrons use ILL. Was E-ZBorrow's model still relevant given patron's research behavior? In the not-so-distant past, patrons used stand along databases, and filled out separate forms for interlibrary loan transactions. E-ZBorrow's interface still supported the older paradigm; it was an inefficient discovery tool, and only truly useful for known item searching. Patrons discovered a book through WorldCat, a subject database, Amazon, Google or some other resource, and then had to login to E-ZBorrow to "rediscover" and request the item. We had the idea that patrons were using stand alone services less, and would prefer a single discovery and requesting interface. Librarians and students both complained that it made no sense to leave our databases after finding an item and then log in to a different system and "rediscover" it in PALCI. But we needed data to back up our assumptions, and something other than anecdotal evidence to make a case for abandoning what had been considered a core service. To test this assumption, Gettysburg used statistics from ILLiad to examine the percentage of ILLiad requests that come through a database such as WorldCat or a website like Google Scholar. We found that the percentage of requests coming through a database continued to rise about 4% a year, and by the end 2009, the percentage of requests coming into ILLiad through a discovery database was 75.4 %. If three-quarters of requests were initiated through another database, the data supported the theory that Gettysburg's patrons preferred a seamless discovery and requesting interface for ILL. If decisions were to be made based on Hesselbein's framework of relevancy, then it was becoming clear that E-ZBorrow was no longer relevant for our user population. If there were a means to update ILLiad to become an unmediated service similar to E-Z Borrow, then there would be no impediments to abandoning the service. Our research showed that with the OCLC Direct Request system we could in fact make ILLiad unmediated for book borrowing requests, and Gettysburg abandoned E-ZBorrow in the summer of 2010.

Communication

Throughout the process of analyzing and abandoning the E-ZBorrow service, the authors took every opportunity to communicate with their staff about the possible changes and to ask for opinions and ideas. Front line staff often has vital information about how users use the service in question. For example at Gettysburg, front line staff told us that users often did not differentiate between traditional ILL and E-Z Borrow, they just cared about getting the book quickly. It was also important that we constantly checked in with the staff doing the work –would they be happy

or sad if the service went away? Would their workload be less or more? What obstacles did they perceive if the service went away? We also took many opportunities to communicate with peers, fellow administrators and our directors. We kept all parties informed of the analysis as it proceeded, making sure to alert them that no decision had been made. This way, by the time the analysis was completed, all staff felt that they were completely informed of changes, and partners in the decision making process.

Not only is it important to clearly communicate to staff, peers and directors about the ongoing analysis but it is also essential, once you have reached an internal decision to abandon a service, to communicate with all of your users. There are two accepted precepts in marketing that should be applied when abandoning a service. The first is just when you are getting sick of what you're communicating, the audience is finally getting the message. So what may be old news to you and your staff still needs to be communicated to everyone else, and librarians and staff should use every possible vehicle available to announce the change in service. The second is that people need to hear something seven times before the message is retained. It is relatively simple to make sure that your news is repeated. It is better to over communicate with your user when you abandon a service. At both Lafayette and Gettysburg, once the authors achieved consensus to abandon the E-ZBorrow service, we used every conceivable communication device to announce the change. For instance, Gettysburg's librarians wrote an official letter to all faculty, published an article in the student newspaper, used the library's news and blog to announce the change on the website and finally created small paper flyers that announced the demise of E-Z Borrow, which were placed in every ILL book. Both libraries gave very specific reasons for not continuing on with the service. We signed all the correspondence personally with our contact information so that any user who had an issue with the cancellation could talk with us directly. This was in part to encounter the challenge that Stoffle et al. addressed when they wrote:

> "This is a difficult challenge for librarians, as we typically hesitate to end a service even if there is one person in our entire community who uses it. …"[15]

We may not be able to hold back on eliminating a service that only a few users feel passionate about, but we can give each user a venue to tell us how they feel and we can directly speak with that user about the reasons why we made this decision. No one should feel that a faceless committee made a decision that makes him or her unhappy.

Best Practices

Throughout this process, the authors developed a successful framework and strategies with which to make a decision to abandon a legacy service. Easily the most important support was choosing to work with one another as we developed our analysis, collected our data and framed our questions. It was useful for the authors to share sources as they uncovered them and point one another to experts who aided in analyzing data. Moreover, working together helped the authors to reach conclusions faster than if we were working alone. A more everyday set of systems must also be set in place in order to make certain that a service can be abandoned. In interlibrary loan, systems include ensuring that there is a scheduled time for updating holding records, searching and joining new reciprocal borrowing groups and researching and exploiting emerging technologies that could simplify processes. Or in other words, analysis and examination is not a static affair, and it must be accompanied by constant upkeep and improvement. This upkeep and improvement must be a consistent, regular and scheduled activity. Although these regularized activities are specific to interlibrary loan work, the authors are sure that there are similar procedures and updates for whatever service is being analyzed. Assessment comes in many different forms and must be examined regularly to notice trends and spot changes. In the case of interlibrary loan, there are many sources of statistics. Use as many statistical sources as possible to check and verify trends and anomalies. Beyond the data, use surveys, focus groups, advisory committees and anecdotal evidence from users to hear their thoughts about your service. Communicate internally about your ongoing analysis to all staff in your institutions, ask to use staff meetings and internal newsletters to keep everyone in the loop. Make sure to be transparent about wanting everyone's opinion and clear when explaining the decision making process. Communicate externally with all of your users by using all communication vehicles you have at your disposal: blogs, emails, newspapers,

formal letters, and websites. Always be willing to take responsibility for the change and make yourself available to any user who would like to discuss the change. Finally, always be open to new ways of providing excellence to your patrons and always be on the look out for new ways to deliver services.

Conclusion

We recognize that in some ways, the decision to abandon E-ZBorrow was easy. The service could be duplicated other ways; OCLC interlibrary loan, purchase on demand and other programs would ensure that patrons would get the books they need when they need them. Other services recently abandoned in academic libraries (but perhaps not reflected in our literature review) include physical reference desks and online reserves programs, but to the best of our knowledge, the services continued to be offered, just in different formats or by varying methods. The true test of planned abandonment of core library services may be coming in the future, and will be the result of an increased need to focus on activities that truly make our academic libraries distinctive. As Scott Walter argues in his guest editorial for *College and Research Libraries*, the "21st century will be marked by different, but equally valid, definitions of excellence in academic libraries, and that the manner in which individual libraries demonstrate excellence will be distinctive to [each institution's] service needs."[16] If the culture of evidence gathering and the kinds of communication tools discussed in this paper are developed, making hard choices to focus on distinctively excellent local services may be just a little bit easier for librarians.

Notes

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