

One is Silver and the Other Gold: Maintaining Old Strengths While Embracing Change

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Today's agenda

- Problem of dealing with electronic resources at one small university library
- Recent studies in change management
- Application of studies to real-life situation

The setting

- Trinity University
 - Approx. 2500 FTE
- 8 librarians in 2002
 - 2 Tech Services, 5 Public Services, + Director
 - All act as liaisons to academic subject areas
- 4 staff handling print subscriptions & standing orders



Providing access to electronic resources at Trinity

- OPAC
- Links to databases from library webpage
- A-Z list
- Online subject guides
- Link resolver (2004-)

The problems

- Rapidly changing environment of electronic resources
- Limited staff
- Limited time
- Our ERM = Excel spreadsheets, records in ILS, and lots and lots of emails

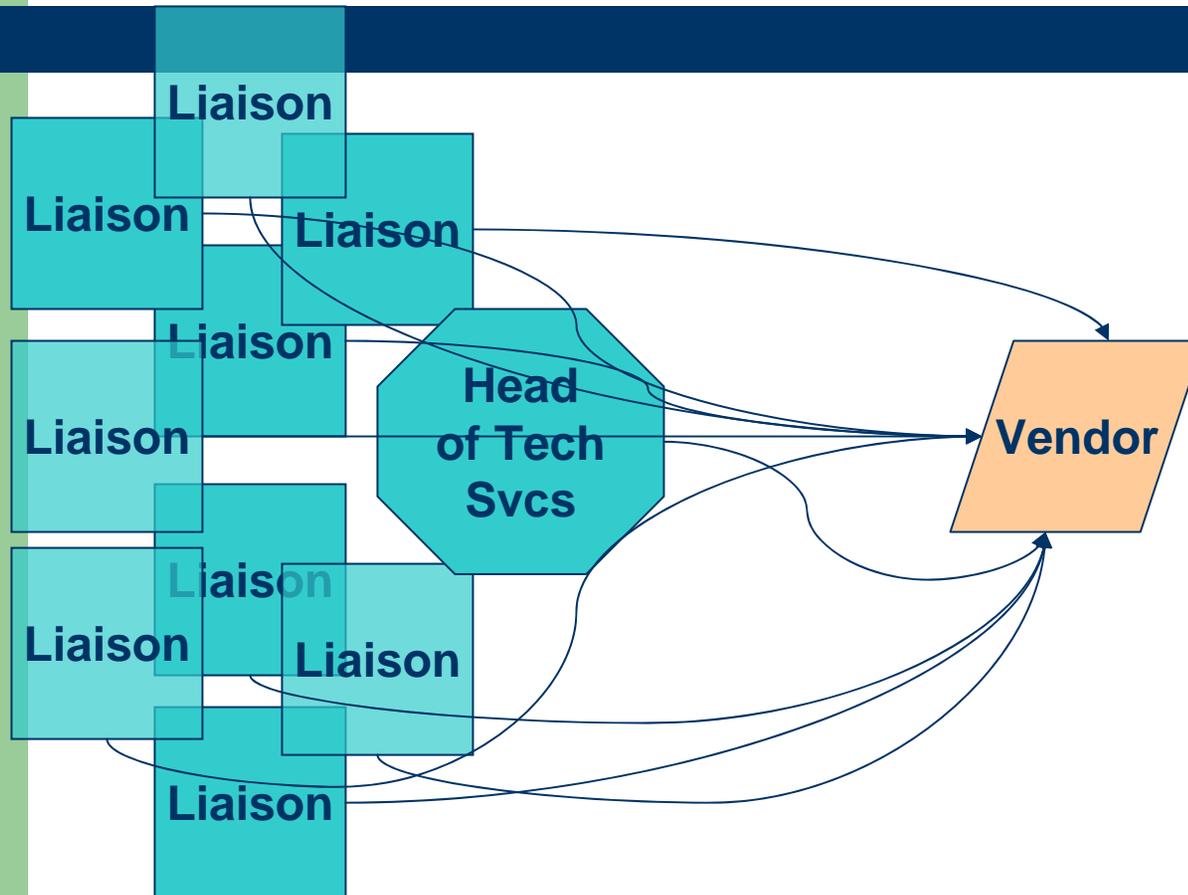
Trinity's ad hoc process: responsibilities distributed

- Librarians select resources in their subject specialties for trial, purchase, or subscription
- Contact vendors for:
 - Trials
 - Pricing
 - Licenses
 - Set-up

Trinity's ad hoc process: responsibilities concentrated

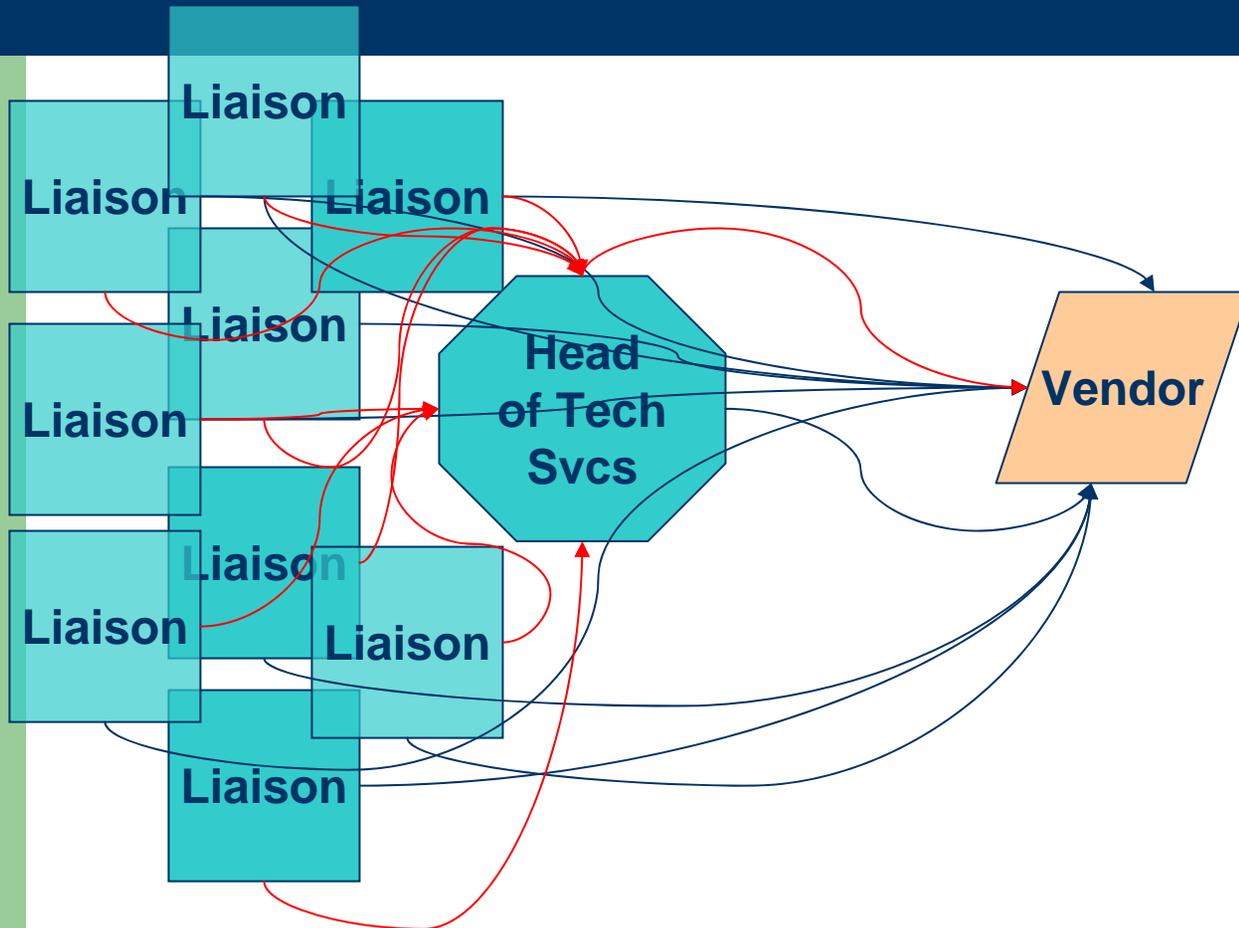
- Head of Technical Services:
 - Point of contact for vendors
 - Review & sign license agreements
 - Invoices/payment
 - Cataloging
 - Troubleshooting
 - Everything else

The distributed part: trials



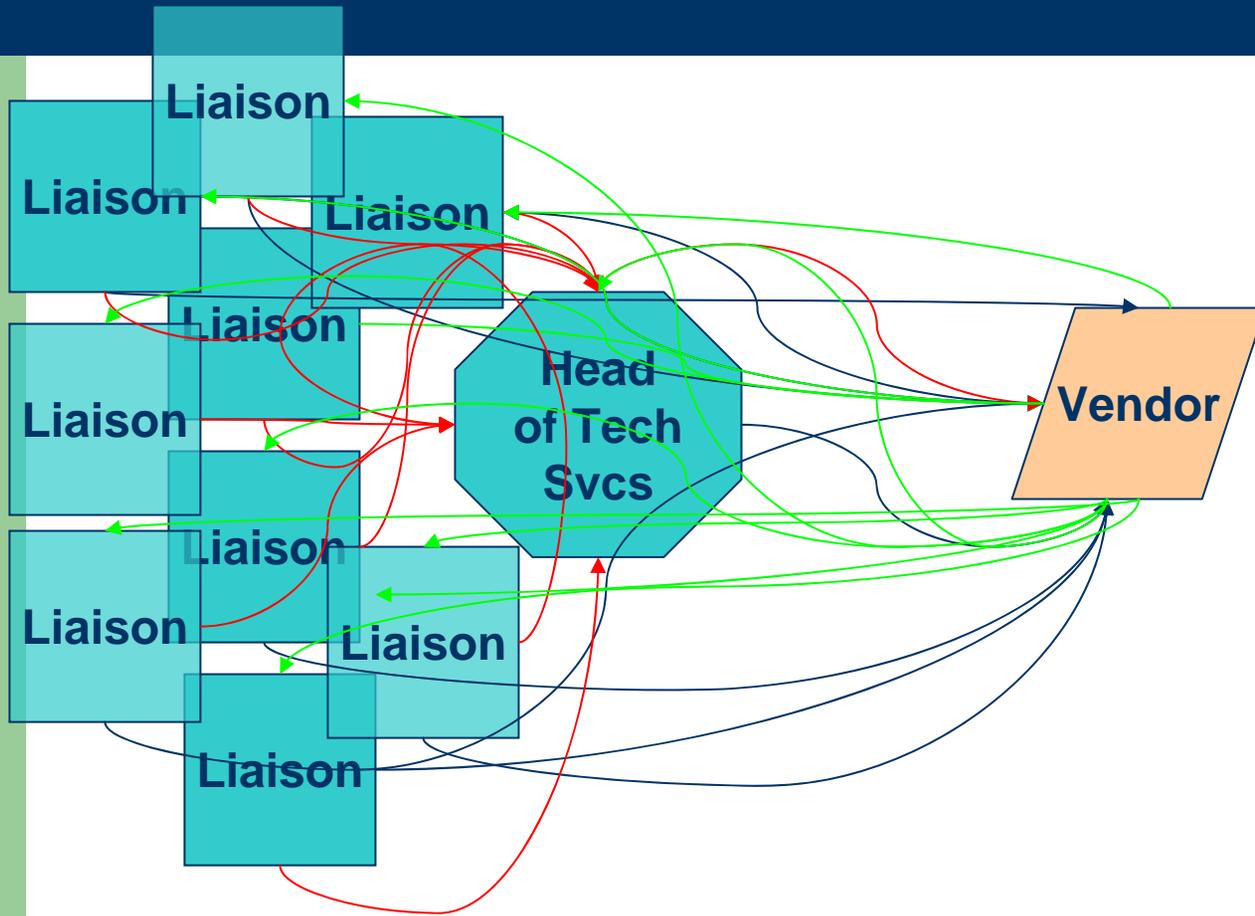
Liaison Librarians would sometimes individually contact Vendors to set up trials...

(...and tribulations)



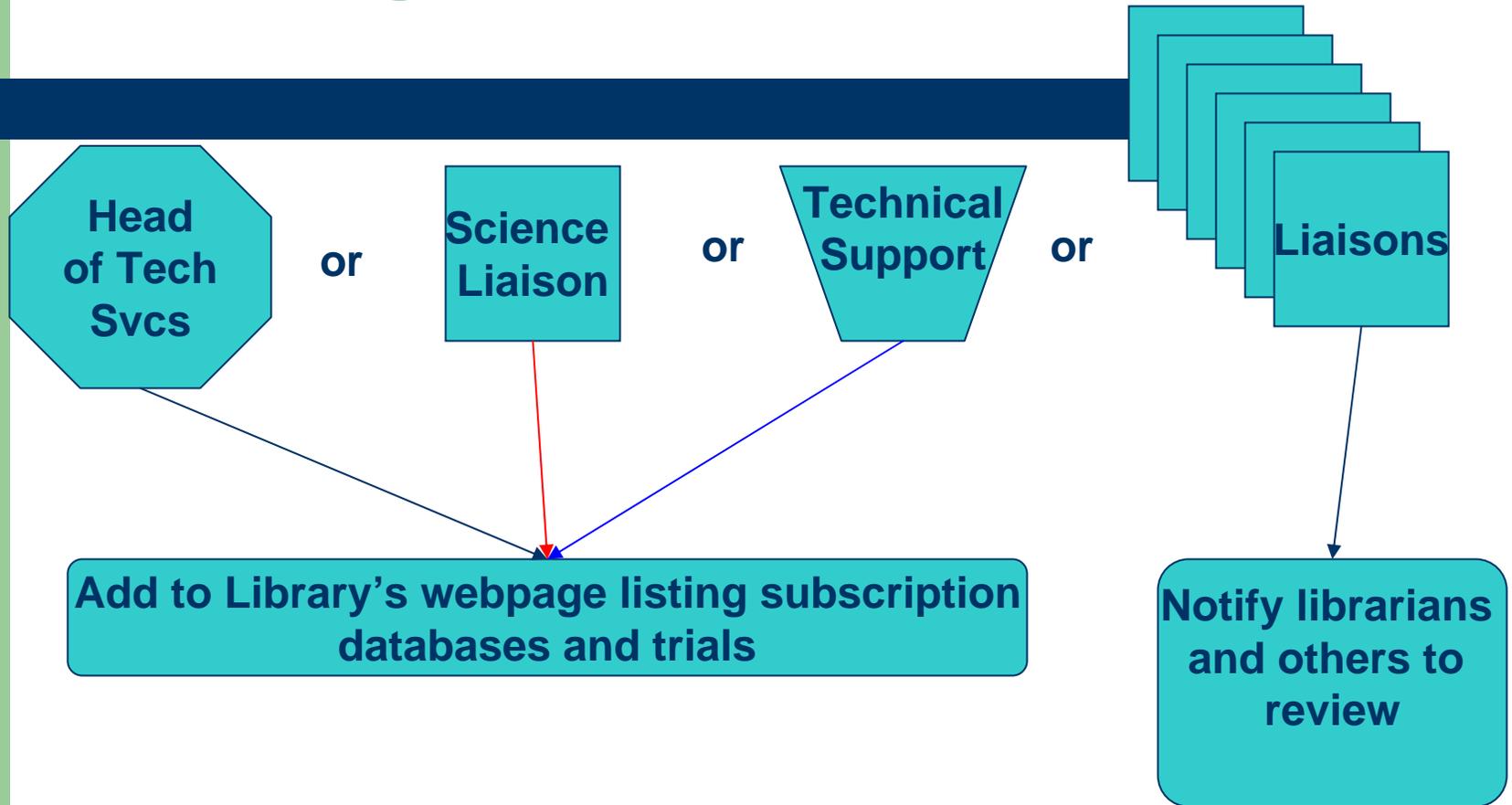
...or would contact the Tech Services Librarian, who would then contact the vendor about setting up a trial.

Spaghetti: It's not just for dinner anymore



Sometimes the vendor would need to contact the library ...but who to choose?

Providing access to a trial...



**And then managing negotiations,
pricing, licensing, etc.:**



From distributed to highly concentrated...





Well, Superman was busy, not to mention fictional.

So they got a new librarian instead.

Settling in...

- New(-ish)/redefined position
- New “team” of staff working with subscriptions and standing orders
- Observation period

Questions asked:

- 1) What's wrong about the current system?
- 2) What's right?
- 3) How do we fix #1 without breaking #2?

1: What's wrong?

- Too many hands involved in early stages of the process = confusing
- Too few hands involved in later stages = overwhelming
- Not leveraging some staff KSA's = ineffective
- Staff fears and uncertainties about transition from print to electronic

2: What's right?

- Liaisons know products and vendors in their areas, so it often makes sense for them to be first to make contact
- Liaisons often have long-standing relationships with vendor contacts
- Having one person in charge of some major tasks makes sense some of the time
- Staff are willing, eager to learn

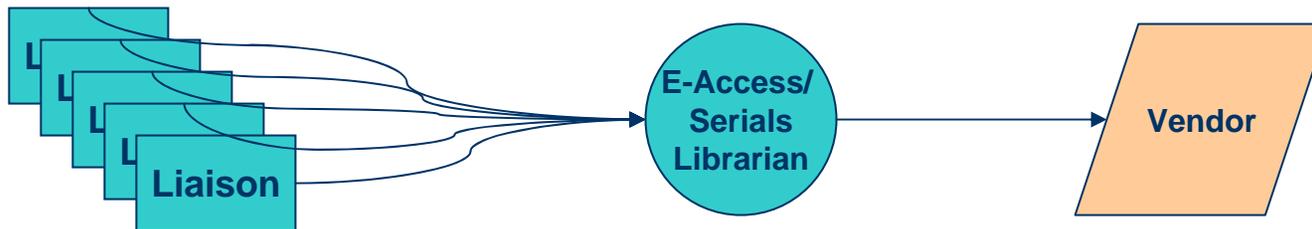
3: How to fix what's wrong without breaking what's right?

Careful Change Management...

...which didn't happen at first
in this case.

Remember the spaghetti?

- First problem: too many hands
 - Needed to be fixed quickly
 - Author didn't know anything about change management at the time



Exacerbating an existing problem...

Review and sign license
Negotiate pricing
Add to A-Z list, if necessary
Usage statistics
Troubleshoot
Handle invoicing
Handle local set-up of vendor interfaces
Handle re-negotiations
Keep up with changes
Set up access in multiple locations
Configure proxy server
Set up trials
Catalog resource if necessary
Marketing/promotion

E-Access/
Serials
Librarian

Balancing the workload

- Solution for all problems: Get everyone (liaison librarians AND staff) involved, but in ways that make sense

Read up!: Four approaches to change

- Directive
 - Fast, top-down, relatively simplistic – generally unsuccessful
- Master
 - Top-down, but less controlled than directive approach; recognition of greater complexity of change – often more successful, particularly over long term
- DIY
 - Linear, fairly simple; change implemented by providing “tool kit” – generally unsuccessful
- Emergent
 - Complex; loosely set direction; collaborative; change is messy – successful, often in both short- and long-term changes

Higgs & Rowland (2005)

Collaborative groups

- Advocated by Conger (2004)
 - *cf.* “emergent” approach in Higgs & Rowland (2005)
 - Recognition that change is complex and messy
 - Help individuals cope with having to learn lots of new things
 - Help organizations assimilate lots of information needed for adaptive learning
 - Arrive at consensus through collaboration

Leadership style: Three leadership factors -- #1

- Shaping behavior
 - Focused on what leaders say and do
 - Others are made accountable for change
 - Leaders think about change
 - Focus on individual, not group

Higgs & Rowland (2005)

Leadership style:

Three leadership factors -- #2

- Framing change
 - Establish starting points
 - Design and manage change journey
 - Communicate guiding principles for change

Higgs & Rowland (2005)

Leadership style:

Three leadership factors -- 3

- Creating capacity
 - Focus on creating individual and organizational capabilities
 - Focus on communicating and creating connections

Higgs & Rowland (2005)

Leadership style: Some conclusions

- Shaping behavior doesn't work well in most contexts
- Framing change most likely to lead to success in short-term change impacting large numbers of people in organization
- Creating capacity good for long-term change initiatives

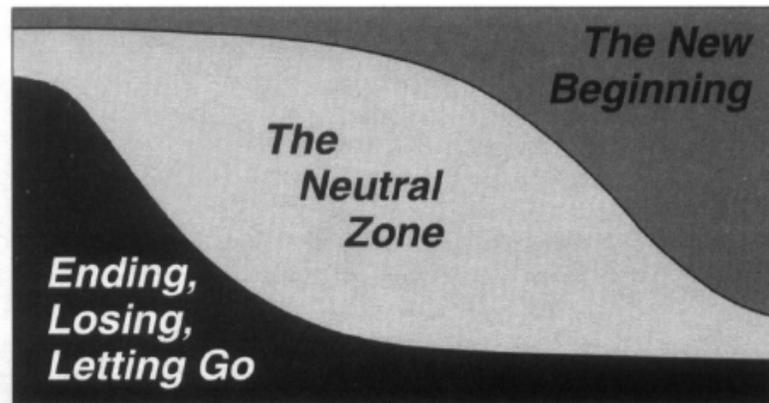
Higgs & Rowland (2005)

Know the team

- What KSA's do individuals possess already?
- How do new tasks parallel ones they already perform?
- Which styles of leadership work best with which individuals on your team?
- Who might be nervous about change, and how do you help them through the process?

The “Neutral Zone”

- “an in-between time when the old is gone but the new isn’t fully operational” (Bridges, 1991)



from Bridges (1991), p.5

Constant transition

- “We must embrace the notion that part of the job is to change the job.” (Lowry, 2005)

Support the team

- Encourage staff to grasp their own power
- Create opportunities for learning and development that may not be directly related to day-to-day work responsibilities
- Ask THEM what they want to learn how to do
- Provide time, materials, and initial guidance for brainstorming – then, hands off!

Back to what was wrong with Trinity's process...

- Too many hands involved in early stages of the process = confusing
- Too few hands involved in later stages = overwhelming
- Not leveraging some staff KSA's = ineffective

Enabling change at Trinity

- Collaborative approach
- Creating capacity (long term)
- Framing change (short term)
 - Explain where we want to go and provide guidelines
- Know my team
 - Which members work best collaboratively v. alone?
- Support my team
 - Provide tools for learning
 - Encourage learning new things (e.g. OpenURL structure, wikis, RSS)
 - Support independent problem-solving

Implementing change: Solution 1

- Problem: Need to reduce confusion of earlier stages of e-resource process without overload
 - Recognize that liaisons are part of the team
 - Make their individual differences work to advantage

Implementing change: Solution 2

- Problem: Need to monitor accessibility of e-content
 - Explain need to staff and ask for suggestions
 - “Check on” v. “check in”
 - ILS work-arounds
 - Apply old, familiar skills to new realities

Implementing change: Solution 3

- Problem: Need to enhance catalog records to make more user-friendly and enhance access to e-resources
 - Again, explain need to staff and encourage suggestions
 - Provide examples of other catalogs, plus basic training in OpenURL construction, etc.
 - Provide time and support for brainstorming & implementation
 - Create new workflows that draw on old KSA's while allowing for creation/incorporation of new ones

Implementing change:

Solution 4

- Problem: Increasing numbers of e-resources means increasing numbers of usage statistics, but available time doesn't increase
 - Recent cuts in numbers of titles acquired = fewer titles being bound = less work with print journals for some staff
 - Encourage staff who are interested to learn how to use Excel & help harvest statistics

What's on the horizon?

- Occasional informative meetings
- Post-conference sharing
- Create opportunities to learn
 - On-the-job training
 - Attendance at local conferences
 - Desktop learning

Steps for managing change

- Read up on change management
- Figure out which approach will work best
- Find a leadership style that will work best
- Know your team
- Support your team

Channel your inner Girl Scout

“Make new friends
But keep the old,
One is silver,
The other gold.”



(Image courtesy of genista on Flickr)

References

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