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...

- Head of Tech Svcs
- Science Liaison
- Technical Support

or

Notify librarians and others to review

Add to Library’s webpage listing subscription databases and trials
And then managing negotiations, pricing, licensing, etc.:
From distributed to highly concentrated...

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

Head of Tech Svcs
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
- Set up access in multiple locations
- Catalog resource if necessary
- Add to A-Z list, if necessary
- Configure proxy server
- Troubleshoot
- Handle invoicing
- Handle local set-up of vendor interfaces
- Handle re-negotiations
- Set up trials
- Usage statistics
- Keep up with changes
- Marketing/promotion
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)
  - 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)
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
“Make new friends
But keep the old,
One is silver,
The other gold.”
References