

**MU Libraries
Organizational Review Task Force (ORTF)
Recommendations
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ORTF Charge

ORTF was charged by the Director to:

- Create a work environment that will allow us (the Libraries) to adapt to change and to continue improving our service to users;
- Explore organizational issues, both structural and cultural, which hinder our abilities to adapt to change and to improve user services;
- Identify and prioritize those issues that must be addressed, and prepare recommended courses of action to present to the Director and Libraries staff;
- Present a recommendation concerning the Associate Librarian for Technical Services position; and
- Present findings and make preliminary recommendations to the Director.

I. Problems Identified by ORTF

The Task Force reviewed the SWOT analysis, solicited input from employees via email, conducted panel interviews with selected employees, and conducted some person-to-person field interviews to determine the most pressing needs of the Libraries. The Task Force identified the following problems: unclear vision/leadership, an uncertain decision-making process, lack of trust, feelings of isolation, lack of accountability, poor communication, fear of innovation and making mistakes, and problems of control/turf/power/status.

The ORTF decided the most pressing problems are lack of vision, poor communication, inconsistent leadership, and an unclear decision-making process.

A) Vision:

Although the Libraries have a Vision Statement, most employees do not know what that vision is or how their work helps the Libraries meet that vision. The vision of the Libraries has not been pushed down into divisions and departments, and it is often difficult to say how departments contribute to the vision of the Libraries. Another problem is that some aspects of the vision are open to interpretation, particularly the idea of users. Each division and department can have different users. Sometimes the users are faculty, students, and staff, and sometimes they are other units in the Libraries.

B) Communication:

Communication is poor. Departments do not communicate well with each other. In some instances internal department communication is also poor. The vision and mission of the Libraries has not been articulated clearly by decision-making groups. Many decisions are made in committees, which seem secretive, causing many employees to be suspicious. There are problems in communication within the hierarchy. Many employees do not know if their suggestions and concerns make it up the hierarchy. In general, meetings on all levels are poorly run and do not have agendas.

C) Leadership:

The Libraries employ smart people with good ideas, but too often these people are unable to accomplish the tasks they set for themselves. Goals are set but infrequently reviewed. Progress is infrequently tracked. Too much of the business of the Libraries is assigned to committees and too many decisions are made by committees.

D) Decision-Making Process:

Many employees are unclear where they should take their problems and suggestions, particularly when they concern other departments or divisions. The hierarchy of the Libraries is unclear as are the ranks within that hierarchy. Too many decisions are delegated to groups or committees. Finally, too many individuals and departments start on projects without consulting key stakeholders.

II. Considerations

During our discussions we developed a set of guiding principles:

- The MU Libraries is one organization. All units, departments, and branches are part of the Libraries, and must work together.
- Everyone should know where to go for answers. The MU Libraries should place a greater reliance on individuals, not committees for decisions and actions.
- Duplication of work and resources should be identified and eliminated where possible.

In addition, the Director asked the ORTF to develop an organizational structure that would decrease the number of direct reports to him. ORTF kept in mind that its recommendations must be workable and that funding for new positions might not be available in the immediate future.

ORTF then considered where future changes might come from. The Task Force identified three areas: users and their changing expectations, budgets, and technology.

A) Users:

The Libraries support the educational mission of the University. The Libraries need to devote considerable attention to identifying and then meeting the demands and expectations of the faculty and students of the University. Most of the changes the Libraries make should be directed toward satisfying those users.

B) Budgets:

Budgets will continue to be a major concern for the Libraries. The Libraries continue to do more with less and have to constantly evaluate budgets and processes. Services and material purchases need to be cost effective, provide value for the money, and acquired in a timely manner.

C) Technology:

Technology will continue to change. The Libraries must identify and purchase equipment and software, which enable employees to perform existing work, as well as provide new services. Continual training and education for all employees is also a must.

III. New Organizational Structure

After considerable discussion, ORTF recommends three administrative divisions and three independent departments reporting to the Director of Libraries:

- **Administrative Services** is comprised of human resources, finance, security, facilities, donor relations, grant and gift monies, organizational development, and marketing. This is also the budget management area of the Libraries.

- **User Services** unites Ellis Information Services, Access Services, and branch libraries, as these units all have direct interaction with our users. Unifying and coordinating them will enhance communication and promote a rethinking of service models. Old service points should be evaluated, new service points considered, and service standards established. Unifying these departments will spur the Libraries to formulate and implement a unified vision of public service. The name, User Services, emphasizes the Libraries' fundamental mission of providing excellent service to our end-users.
- **Resources Management** replaces the current Technical Services division. Resources Management does not address a change area, but it maintains the vital functions of acquisitions, cataloging and physical processing.
- **Library Technology Services** becomes a newly independent unit that reports to the Director of Libraries. It buys, deploys, and supports computer hardware, servers, software, mechanical devices and telecommunications equipment and oversees outsourcing. LTS serves as the primary liaison between the Libraries and external IT related entities.
- **Special Collections, Archives and Rare Books (SCARaB)** departments will exist as a single independent unit, reporting to the Director of Libraries. The Director will invite the head of SCARaB to discussions whenever appropriate.
- The **MU Health Sciences Libraries (HSL)** will exist as an independent unit, reporting to the Director of Libraries. The Director will invite the HSL director to discussions whenever appropriate.

A) **Recommendations Regarding the Organizational Structure**

The ORTF recommends that several positions or departments be added. Some of these positions are essential for the immediate success of the reorganization while others can be deferred.

1. A Director of Resources Management should be hired. This is a high priority. A Director would maintain the smooth functioning of this division, and provide a stable base upon which the other organizational changes can be made. The existing vacant salary line should be used to fund this position.
2. A Director of User Services should be hired. This is a high priority. The Director of User Services will have to manage and coordinate the Branches, Access Services, Ellis Information Services, and Collection Development. Until a salary line for the Director of User Services becomes available, the Branch Services Coordinator and the heads of Collection Development, Access Services, and Ellis Information Services will report to the Director of Libraries.
3. A rotating Branch Services Coordinator should be chosen from among the branch librarians in consultation with the Director of User Services. This person serves as a liaison between the branch librarians and the Director of User Services. This is a high priority and can be done quickly.
4. A Communications Officer should be added to the Administrative Services Division. This person will conduct or manage user assessment/evaluation, solicit user feedback, and provide collected data to appropriate departments within the organization. This person should also serve as the primary media liaison, serve as the coordinator of MU Libraries marketing and promotion, and contribute to user assessment of Library web pages. This position is a high priority.
5. A Collection Development position should be established, and report to the Director of User Services. This is a high priority. MU Libraries' employees need one person to whom they can go for information about the collection.

6. An important part of managing the collections is preserving them. A Preservation Department should be added to the Resources Management division when funds become available for a preservation lab and a preservation librarian.

B) Mergers within the Organizational Structure:

1. In order to realize efficiencies of cost and service, the merger of HSL and Ellis technical services should be investigated and a recommendation presented to the Director within 12 months. The Director of Libraries, the Director of HSL, and the HSL and Ellis technical services heads will need to be involved in this process. Performance and service standards should be set and agreed upon by all parties.
2. The merger of HSL and Ellis Interlibrary Loan units should be investigated and a recommendation presented to the Director within 18 months.

IV. Other Recommendations

The Task Force has a number of other important recommendations:

A) Establish and Disseminate the Vision and Mission of the MU Libraries.

1. The Director of MU Libraries should articulate a vision for the MU Libraries and support and encourage that vision through word and deed. The vision sets the direction of the Libraries and guides our actions as an organization. Every initiative, plan, or action the Libraries take, at any level, should be tested against the vision to ensure that the organization is on track. The vision of the MU Libraries is dynamic and should be evaluated and changed by the Director of Libraries as necessary.
2. The Director, in consultation with the Administrative Group, should formulate and prioritize goals with definite and measurable objectives annually. The goals must be made clear to employees at all levels within the organization. Objectives must be bound to a timeline, with regular assessments of progress and timelines adjusted as necessary.
3. Division heads, department heads, and unit supervisors must understand and support the mission and values of the organization, and be prepared to disseminate supporting plans, directives and expectations to their employees. Employees should be prepared to provide timely feedback to supervisors which include concerns, obstacles, needed resources, progress, etc.

B) Use the Mission and Values Statement to Set and Maintain Goals and Objectives

1. Each division should have its own publicly displayed mission statement. The mission statement should explicitly state the people and departments, whether internal or external, the division serves. Division mission statements will be reviewed by the Director and his Administrative Group to ensure that divisions are not working at cross-purposes. Every part of the Libraries should know what it is doing and how its mission supports the Libraries as a whole.
 - a) Employees in each division should understand the mission of the Libraries, and understand how their division helps to further that mission.
 - b) Each division and department should set definite and measurable objectives. These objectives must have owners responsible for their completion. To ensure that division and departmental objectives are being met, they should be subject to quarterly peer and supervisory review.

- c) The goals of each division or department should be tracked. Tracking software should be purchased or existing software adopted. This software should be able to keep track of goals and objectives, identify responsible parties, set timelines and generate reminders. This software should be made as widely accessible as possible. All employees should be able to see the progress being made by themselves and by others in the Libraries.
- 2. Each unit should establish output measures which are useful and appropriate. Measures should be meaningful and help divisions and departments determine if they are working toward the mission of the Libraries.
- 3. Whenever a vacancy arises, the needs of the Libraries should be evaluated. The director, in consultation with the Administrative Group and the Head of HSL, should assign the salary line to the unit or division where it will best fulfill the stated objectives and mission of the Libraries.
- 4. To ensure that the vision of the Libraries is communicated, all-staff meetings should be held semi-annually at a time when most employees, including employees working evening shifts, can attend. Additionally, the meetings should be made available in an electronic format for the benefit of those unable to attend. Meetings should have an agenda, which includes presenting the vision of the Libraries, reports of progress the Libraries are making toward goals, and new initiatives. Questions from employees should be encouraged and suitable time for questions allotted.

C) Encourage Leadership, Accountability, and Communication

- 1. Supervisors are expected to disseminate information, control workflow and make decisions. Supervisors at all levels should be required to participate in periodic management training.
 - a) The Task Force recommends that all new supervisors within the MU Libraries complete management training during their first year on the job. The training may be division, department or unit specific, but should include instruction in effective planning, decision making and policies that govern the organization.
 - b) Employees should have a clear idea of job performance. This might entail personal communication from their supervisor and written evaluations. All employees should be formally and personally evaluated annually. Evaluations should include feedback from employees to supervisors, plans for the future, and discussion of coming changes.
 - c) The MU Libraries should hold regular workshops on topics such as personnel management, consensus building, problem solving, decision-making, and conducting meetings. All employees should be required to attend a minimum number of the total courses offered (for example, attend 2 of the 6 courses offered in a calendar year). Attendance, or lack thereof, could be noted on performance evaluations.
- 2. Employees should be strongly encouraged to attend the programs being developed by the Libraries' Staff Development Committee. The MU Libraries should facilitate attendance by offering alternate times, various formats, flexible schedules, etc.
- 3. MU Libraries should strongly encourage all employees to attend software training workshops conducted by LTS or IATS.
- 4. All committees or task forces should have mechanisms for oversight, a formal charge, expectations, established timelines, and a person to whom it reports.

5. Employees should be encouraged by their supervisors to bring up questions, problems, and solutions to problems. Once the supervisor has been contacted, it is his or her responsibility to follow-up appropriately and get back to the employee with an answer. This follow-up may include effecting a change, passing the problem or suggestion on to the appropriate department, etc.
6. Discussion and ideas forums should be held regularly. The Task Force believes that all employees of the MU Libraries can have good ideas or see problems in different ways that can lead to novel solutions. Topics or problems should be identified and all interested parties encouraged to come. Presentations, if there are any, should be kept short. Discussion and questions should be encouraged. If appropriate, actions should be taken and tasks assigned.
7. A non-threatening mechanism should be developed which gives all employees the ability to voice suggestions and problems they see in their own or other areas of the Libraries. Currently there is no good way to bring issues forward for discussion between divisions and departments. The Libraries Administrative Group should determine the best method available to implement this recommendation. All suggestions and problems should be responded to so that employees will know the status of the suggestion or problem.

Some examples which came to the attention of the ORTF during its discussions include but are not limited to:

- i) Signage in the stacks should be evaluated and improved.
- ii) We are not currently using the III Bind Pull Program to facilitate periodical binding. Why not?
- iii) Public service units are maintaining check in files of unbound periodicals. Could changes be made to the Merlin checkin records to eliminate the need for this process?
- iv) Some selectors would like to place orders on hold on line using vendor databases and have Acquisitions. Dept. employees finish these orders on line eliminating the current need to send paper to Acquisitions. How can this be accomplished?
- v) The Libraries look at all of its physical space and develop a usage plan that reflects its vision and mission.

V. Recommendations for Implementation

1. Following the January 31st all staff meeting, there should be additional employee discussion opportunities. They will be convened by the Director, include members of the ORTF, and will address further questions, concerns, and implementation.
2. The Director will establish a schedule for implementing the recommendations.
3. The recommendations to be implemented should be reviewed every three months and progress should be tracked and reported to all employees.