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Recommended Citation

Jennifer E. Nutefall, Faye A. Chadwell, "Preparing for the 21st century: Academic library realignment", *New Library World*, Vol. 113
Iss: 3/4, pp.162 - 173

DOI: [10.1108/03074801211218543](https://doi.org/10.1108/03074801211218543)

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Preparing for the 21st Century: Academic Library Realignment

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Abstract

Purpose – The purpose of this article is to communicate how an academic library can establish and implement a realignment process to prepare itself to serve users in the 21st century.

Design/methodology/approach – The authors employed a case study approach to present the challenges of realigning an academic library. We describe the collaborative and interactive process that Oregon State University (OSU) Libraries undertook to envision what a 21st century academy library might demand and to realign its units to support this vision. We summarize the positive outcomes of this process and provide an overview of what next steps might be.

Findings – A combination of visioning exercises and collaborative study of the appropriate LIS literature was key to establishing the direction that the OSU Libraries' realignment would take and the eventual organizational structure the Libraries implemented. The realignment activities not only emphasized collaboration among unit heads, but also emphasized the importance of clear communication, ongoing assessment, and connection to the University's overall strategic goals and realignment in order to guarantee eventual success.

Originality/value – This article describes a process that most academic libraries could emulate to shift the focus of legacy operations and departments to those that successfully meet the challenges of the 21st century academic library.

Keywords -- academic libraries, realignment, change, future

Paper type -- Case study

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Faye A. Chadwell was appointed the Donald and Delpha Campbell University Librarian and OSU Press Director at Oregon State University in May 2011. Prior to this appointment she was OSU's Associate University Librarian for Collections and Content Management, a position she'd held since August 2007. An Oregonian since 1995, she also served as the Head of Collection Development and Acquisitions at the University of Oregon Libraries. She worked at the University of South Carolina in Columbia as the social sciences bibliographer and as a reference librarian from 1988-1994. She holds a B.A. and an M. A. in English from Appalachian State University and an MLS from the University of Illinois at Urbana-Champaign.

Introduction

What does a 21st century university look like? This question motivated Oregon State University's (OSU) President and Provost to announce a plan to realign the university to focus on strategic directions and priorities in three signature areas: advancing the science of sustainable earth ecosystems, improving human health and wellness, and promoting economic growth and social progress. Implemented during the 2009-2010 academic year, the final realignment created four divisions out of 11 existing colleges. OSU Libraries (OSUL) chose to use the university's desire for realignment as an opportunity to seriously review library functions and organization with the intention of delivering library services that address anticipated needs of the OSU community. How is a 21st century library organized to meet the needs of its community? This article will provide an overview of the literature on change in academic libraries and the articles used for the realignment, a description of the realignment process, responsibilities of the new departments and lessons learned.

Literature Review

This literature review will set the context for this case study, covering articles from the United States that focus on change in academic libraries and the articles chosen and consulted by library administrators and department heads during the realignment process. The Libraries' plan to align with the rest of the campus was re-enforced by Franklin (2009). His case study focused on the University of Connecticut's alignment of the library with the campus strategic plan. In 2008 the University of Connecticut libraries rethought its approach to services and created a reorganization project team. The reorganization's focus was to "shift the libraries' focus from an organizational structure based on internal library functions to a structure designed to support the university's academic plan" (p. 501). The final reorganization included 5 program areas:

Academic Research Services; Undergraduate Education and Access Services; The Thomas J. Dodd Research Center; The Regional Campus Libraries; and Central Services. Franklin concludes that the success of the reorganization will be measured over the next five years using metrics from the libraries' strategic plan and demonstrating "how well integrated the UConn Libraries have become in the university's efforts to carry out its academic plan" (p. 503, 505). Fitch, Thomason, and Wells (1993) also focus on a library wide reorganization at Samford University in Alabama. They discuss how Samford University's library completely rethought their physical and staff operations and implemented an organizational structure "to meet the challenge of service excellence with flexibility, enthusiasm, and efficiency" (p. 294). A team of professional staff was tasked with the reorganization with the goal to improve services and processes. The team's process proved unique as they solicited input from the whole library staff to gather ideas for the new organizational structure, a new structure that eventually allowed the library to automate and plan for a building expansion. The authors conclude that "professional and support staff must be empowered to participate in planning and changing their library to produce a responsive, customer-centered environment" (p. 298).

Several LIS authors address the question: "What does the 21st century library look like?" Barclay (2007) discusses the planning behind the UC Merced library as a model for structuring the 21st century research library. He provides insights on library as place, signage, RFID, and collections. While Barclay does not explicitly discuss Merced's organizational structure, he does outline three principles for creating a 21st century research library. Principle one is to begin by asking "What is it we want to do?" Starting with this question can help break down traditional thinking. Principle two focuses on technology, stressing how "we always maintained that we would use

technology to achieve specific ends but would not use technology for its own sake” (p. 114). Principle three is to plan bravely, with courage and the knowledge that plans may fail to work. To engender collaboration and build investment in the process, during OSU Libraries’ realignment process department heads were asked to provide articles that focused on the future of collections, services, and space or other relevant topics that could inform our realignment discussion. The articles selected ran the gamut of topics. A few selected here reflect the trends in academic libraries but also emphasize some of the strategic challenges informing the University’s realignment needs and opportunities.

Every librarian knows that collection acquisition and management are undergoing changes that will have impact across library units. Anderson (2008) counsels librarians, especially “serialists” to “future proof” themselves by recognizing that the future for library collections will focus on unique collections and digital resources. He makes five predictions that describe this future while also providing one strategy per prediction to help libraries confront the future. Anderson concludes that the successful library of the future “will be the one that has found new ways of meeting its stakeholders’ needs” (pg. 566).

How do libraries reconceptualize collections, space, and services? In what proved to be a pivotal article, Pritchard (2008) discusses these areas and writes “the key is in reorienting our work to a much more refined definition of services, focusing on unique strengths, local needs, and multiple ways of delivering information” (p. 222). She emphasizes the importance of defining the library’s mission and users. In terms of services, she states

As libraries try to locate new services within typical organization charts, where does one put things like digital publishing, scholarly communication support, or information management consultation, in which we advise faculty about structure and metadata for their own databases and Web sites? These are increasingly important services, yet formalizing them requires taking apart older notions of departments and tasks (p. 227).

She concludes by advocating for a deconstruction of the library as a way of bringing a new perspective to library organization.

A major focus for OSU is international students and the internationalization of the university. Becker's (2006) article on internationalization of higher education and the role of Australian academic libraries provides an in-depth case study analysis of two libraries identified as engaging in wide and deep internationalization practices: Ibis University and the University of Greenfields. Because higher education institutions across the globe are seeking to increase their globalization, Becker offers ways to apply the findings of her research for other libraries seeking to help their institutions internationalize.

Two articles included in the OSU Libraries' realignment reading packet focused on K-12 students and their needs to provide some understanding of the users that academic libraries can expect to encounter in 10 to 15 years. Lawrence Hardy (2010) argues that since the availability of information has expanded exponentially, well-trained school librarians ought to be positioned to help students navigate and evaluate the wealth and diversity. "Libraries," states Joyce Kasman Valenza, a school librarian/blogger quoted in Hardy's article, "need to change from places just to get stuff to places to make stuff, do stuff, and share stuff" (pg. 25). Elizabeth Haynes (2010) writes about the Class of 2022 and the challenges this group of "digital natives" will bring to librarians and other educators not only because of the anticipated growth and development of hand-held devices and other digital technology but also because of the culture or mindset that these digital natives bring to the classrooms and libraries as a result of their early and ongoing exposure to technology.

Other pieces consulted during the realignment process were the 2009 Ithaka report, the ARL 2030 scenarios report, and ACRL's futures thinking report on academic libraries in 2025

(Schonfeld & Housewright, 2009; ARL 2010; Staley & Malenfant 2010). Additionally, articles from mainstream media were consulted when highlighting issues libraries will be facing in the near and not so near future such as digital decay and the rise of digital content, (Cohen 2010; Darnton 2008; Kellogg 2009; Kolowich, 2009).

Background

OSU Libraries (<http://osulibrary.oregonstate.edu/>) provides support to meet the teaching, learning, and research needs of OSU's students, faculty, and staff. During the 2009-2010 academic year, the university asked all units on campus to submit a plan for strategic realignment and budget reduction. The goals of the realignment were to:

- Restructure administrative and academic units to advance the university's strategic goals and signature areas;
- Achieve budget savings; and
- Develop a system to monitor progress, accountability, and savings.

All units on campus, including the library, were asked to submit a proposal for strategic realignment and budget reduction. Prior to submitting the Libraries' response, the University Librarian (UL) and two Associate University Librarians (AULs) discussed whether the current organizational structure aligned with the goals and major initiatives in the library's strategic plan. How would a realignment benefit the library and the University and what might it look like? This initial brainstorming session on possibilities for realignment yielded enough ideas to move forward with engaging department heads in the visioning process. Priority areas emerged in teaching, scholarly communication, open access, community engagement, data curation, and digitization. Although prompted by the campus request, the Libraries had continuously evaluated and reexamined its organizational structure along with its strategic goals. The existing

organizational structure included nine departments. Figure 1 provides the organizational chart showing the reporting lines for these nine departments.

[INSERT FIGURE ONE]

Process

At the beginning of the realignment process in March 2010, the UL and AULs met to map out the overall goals and decided to exclude the OSU Press from the realignment. The process and content for the realignment moved to the AULs because of their close integration and involvement with the department heads whom they supervise. Before meeting with the department heads, the AULs met several times to discuss potential realignment models, focusing their discussions on assumptions related to organizational development and asking what might shape or influence the future organizational development of OSUL and academic libraries in general. The AULs also outlined what activities librarians and library staff might pursue more frequently in the future as a part of their regularly responsibilities. Activities include instruction, outreach, assessment, scholarly communication, digital publishing, and working with metadata. The outcome of these meetings was a list of activities with broader descriptions that led to a preliminary list of possible unit configurations and missions:

- GET IT Department--Acquisitions, Circulation, ILL, Collection Development, selectors
- Build a Learning Environment—teachers, space
- Knowledge Organization and Distribution – catalog, institutional repository
- Scholarly Communication
- Unique at OSU
- Assessment
- Technology

The next step was gathering input from the Libraries' administrative team known as Library Administration, Management, and Planning (LAMP). LAMP's department heads (excluding OSU Press) were divided into two groups with an AUL leading each group. The AULs made a conscious decision to not create these groups simply by aligning LAMP members who reported to a specific AUL—respectively, the AUL for Innovative User Services and the AUL for Collections and Content Management. Instead the membership of these groups was mixed to facilitate cross-pollination of ideas. Each group was given two months for their discussions and charged with presenting, as a final product, a new organizational structure with department descriptions and a new organizational chart. The following sections provide an overview of the process used by each AUL and their group to come up with their proposed reorganization.

The group led by the AUL for Innovative User Services started by writing down all the current library services and activities that they could think of. This activity was followed by the creation of a list of 10 services or activities the group considered a priority in the next 5-10 years. These exercises were done individually and then each member shared the activities/services seen as a priority so areas of overlap could begin to be identified. The priority activities/services were grouped into 11 categories and included assessment, outreach, space, data curation, and digital collections. The group also identified activities the library could stop doing, including journal claiming, cataloging, subject specialists, fines, copiers (only provide scanning), and book processing. From the 11 categories the group began moving items under more central categories with significant discussion focusing on areas of overlap. The final plan included five departments or priority areas as Figure 2 illustrates.

[INSERT FIGURE 2]

As outlined at the beginning of the realignment process, a document was produced that included a definition for each area, unit activities, and an organizational chart was created. The goal of this group's realignment plan is to maintain the libraries' relationship to the university and to continue to offer services and resources that make students and faculty successful in their learning, teaching and research.

Prior to the first group meeting led by the AUL for Collections and Content Management, department heads were asked to come prepared to draw on what they had learned from readings, what they knew about how other libraries and organizations are evolving, and what positions other libraries are formulating that might eventually take prominence in a new structure. At this group's first meeting, members participated in a visioning exercise that asked them to imagine what the OSUL organizational structure might look like and act like in the next 3-5 years. Group members were encouraged to forget about what the existing units and organizational structure do and to not consider (at least temporarily) the work that many library staff were currently performing. The brainstorming/visioning exercise made use of questions that the AULs had created during their earlier meetings.

At the next meeting, the AUL employed yet another series of questions intended to envision a new organizational design. This meeting concluded with each LAMP member attempting to complete the following statement with five different responses: We should be delivering or providing (fill in the blank) services or performing (fill in the blank) operations/functions. As a follow up, each individual was asked to explain why the service or function was important. Here are the important areas of focus established as a result of this meeting and the prior meeting:

- Support for the knowledge creation process (copyright, scholarly communication, data management);
- Provision of centrally located and inviting place for users to study, collaborate, socialize,
- Promotion of unique resources held at OSU Libraries;
- Customized information retrieval and fulfillment--the capacity to fill any sort of researcher request whenever and whatever via transparent processes and systems;
- Engagement with users, especially undergraduates, to help them be successful;
- Application and development of tools and services to solve problems for users and for library staff.

At this group's final meeting, LAMP members reviewed the notes and lists from the previous meetings. The emphasis needed to be creating units that would advance the Libraries and support areas of endeavor that need to be supported. As a result of this activity, the group proposed six departments or units to carry out the significant future areas of focus. These units were:

- Center for Digital Scholarship
- Emerging Technologies, Trends, and Services
- User Services (also known as the Get It Department)
- Primary Research Center
- Learning and Liaison Services
- Guin Library

Though the AULs did not receive any formal feedback on the separate processes (and their respective merits and drawbacks) that each pursued, informal feedback from LAMP members

did indicate that the department heads were pleased with the collaborative nature of the activities and the level of input they were able to provide.

Final Realignment and Implementation

The goal of the realignment exercises was to strategically realign the Libraries so as to position library staff to anticipate and address the needs and expectations of users at present and in the future. At the LAMP meeting on May 11, 2010 each group presented their final recommendation including organizational structure and answered questions. While each group ended up with a different final product, there were clear areas of overlap in focus and direction that created a foundation for the realignment. After this meeting the AULs regrouped with the UL to finalize an organizational structure that brought together the best structure from each group's recommendation. This structure embedded the scope of foci that the group led by the AUL for Innovative User Services had identified. This structure also drew upon the departmental combinations that the other group led by the AUL for Collections and Content Management created. It also recognized that given the staff size of OSU Libraries, the final units would still need to draw upon FTE from more than just a single unit to provide necessary operations and services. The UL and AULs then tentatively assigned faculty and staff to appropriate units and created timelines for communicating when departments would be dissolved, new reporting structures would be in place, and staff would move to new locations. In July 2011, the AULs planned a retreat with LAMP to discuss the final phases of the realignment. This retreat covered the mission of the departments and their titles; staffing – assignment of librarians and staff to departments; location--where/how the new departments will be formed; timeline for implementation; gaining feedback on the realignment; and future position searches that would need to be undertaken. A second phase of the realignment focused on the merger of

the Special Collections and University Archives units into one. This phase was initiated (and planned for) following the retirement of the head of Special Collection in January 2011. It also involved engaging an outside consultant to provide expertise on the merger of workflows, consolidating physical collections, and focusing staff expertise.

The final realignment included six departments which are described below. Figure 3 demonstrates the realigned library's organization.

1. The Collections and Resource Sharing Department (CRSD) brings together 30 FTE from acquisitions, collection development, ILL and access services into a single unit to ensure that users have the content they need for learning, teaching and research. The creation of CRSD acknowledges the importance of resource sharing, including collaborative collection development, and new methods of acquisition, such as user-driven collection building, as strategies to meet this goal.
2. Teaching and Engagement Department emphasizes the increasing importance that information literacy plays in the success of OSU students and the University (increased retention of students, the development of lifelong learners, support for an information literate society). This department will focus not only on the teaching aspects of information literacy but also will concentrate on developing physical and virtual learning environments conducive to student learning and success.
3. The Center for Digital Scholarship and Services is dedicated to supporting OSU's research enterprise through the organization, delivery, management and preservation of a wide range of digital and print resources for scholars and students at OSU and beyond.
4. Emerging Technologies and Services (ETS) leads the development and support of the Libraries's IT infrastructure and online environment. ETS monitors trends and new

technologies. Its pursuit and support of new tool and service development as well as collaborative partnerships will position the Libraries to respond to the evolving information landscape.

5. Branch Libraries Department - This department includes the multifaceted operations of the OSU Libraries' two branch libraries, the Guin Library at the Hatfield Marine Science Center and the OSU-Cascades Library embedded in the Central Oregon Community College Library. While separated by physical distance, the branches address similar challenges of providing seamless and appropriate services for our users. Though the users and institutional settings require different approaches to providing services and resources, they also require alignment with overall OSU Libraries' policies, mission and vision.
6. Special Collections and Archives Research Center - This newer unit draws upon the distinctive materials within Special Collections and University Archives. Its focus is practical in that it will create a single service and physical access point for the Libraries' unique collections of records, manuscripts, and visual materials. The vision for SCARC is to integrate the Libraries' significant special collections and archival holdings more thoroughly into the research and teaching of the University, especially by engaging student workers and student researchers not only in processing and describing archival content, but also creating new knowledge based on the holdings.

[INSERT FIGURE 3]

Looking Ahead

The process of realignment and reorganization is never complete and libraries need to remain flexible and agile to meet users' evolving needs. While OSU Libraries' new organizational structure was implemented in September of 2010, additional changes were anticipated. For

example, the retirement of the head of Special Collections provided an opportunity to look at the merger of Special Collections and University Archives. OSU Libraries also anticipates changes with services at the branch libraries. To make any realignment successful, however, the process needs to be communicated clearly and the entire library, not just the administrative team, needs to understand and invest in the new model. The department heads need to communicate and work with their staff throughout the process and plan for the changes.

As with any change process, each experience also provides learning opportunities. Here are four lessons learned from this realignment process.

1. Know your destination. Libraries undertake realignment for various reasons. From an administrative perspective, it is important to provide an overall vision and context. There should be clearly articulated goals for the realignment and an outline of concepts that the realignment will accomplish. This will ensure that the realignment is purposeful rather than just an interesting intellectual exercise. This will also provide common understanding for staff across all units about how their new unit may contribute to the overall library organization and mission.
2. Communication. A challenge in any organization is to communicate the information needed in a timely fashion. During a time of transition and change, communication is especially important. While the administrative group was regularly talking about the realignment it could have been emphasized and communicated more thoroughly to the library faculty and staff. This would have allowed questions and concerns to be addressed early on, especially in regard to the timeline. This also would have allowed for broader input from across the library, which is a key factor in successful reorganization for any institution or agency.

3. Assessment. As with any change assessment is key to knowing its success. Establishing indicators of success for the realignment and then conducting follow-up would have provided valuable input for future processes. More follow-up with department heads and librarians on the realignment should have been done to indicate their understanding of the process and what worked.
4. Connection to the University's realignment. The University's realignment was the initial driving force for OSUL's decision to begin its realignment. Its focus was largely on consolidating colleges and departments especially as a means to reduce expenditures. While the budgetary focus was not reflected in OSUL's realignment process there is an impact in repurposing positions and collections. The Libraries are better positioned for the future by using its resources more wisely. In the future, the University's focus on collegial and departmental structures will require OSUL's examination of the impact these changes might have on the Libraries' organization in the future, especially within individual units.

Conclusion

There are many valid or worthwhile reasons why an academic library might elect to undergo a realignment process: tremendous technological change, severe budgetary need, or evolving management or change theory. These are especially valid when careful planning is undertaken so the realignment is responsive rather than reactive to the present and perceived future needs of users. While users were not directly consulted during this realignment process, it is expected that user input will be received during the next strategic planning cycle. It is also important to remember that the process for realignment is not static – it is evolving and iterative. This is what distinguishes OSUL's process--that the Libraries' realignment was driven primarily by the desire

to prepare its organization proactively for success as a 21st century academic library serving the 21st century academic library user.

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