Against the Grain

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Let's Get Technical-Resource Management: Reorganizing to Reassess and Remain Sane

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Let's Get Technical — Resource Management: Reorganizing to Reassess and Remain Sane

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*Column Editors' Note: In this month's column, we feature the experience of reorganizing a unit due to internal and external forces. **Sommer Browning** and **Katy DiVittorio** from the **Auraria Library** of the **University of Colorado Denver** describe the process that went into reorganizing their technical services division. — SM & AM*

Introduction

In 2014 and 2015, the Technical Services division at **Auraria Library** lost over a third of its workforce due to resignations and retirements. An organizational assessment revealed that Technical Services could be more successful, efficient, and communicative if the Acquisitions, Access & Discovery, and Assessment teams merged to form Resource Management. A combined team would provide a holistic understanding of the e-resources lifecycle, creating the ability to analyze existing workflows and tools to maximize staff efficiencies and minimize the time between purchase and patron access. This article will discuss the creation of the Resource Management department, the outcomes and obstacles of the new reorganization, and future reorganization including the recent integration of the Interlibrary Loan (ILL) and Stacks Management teams.

The Problem

Auraria Library is unique in that it is the only tri-institutional academic library in the nation. It serves three distinct institutions, the **University of Colorado Denver**, **Metropolitan State University of Denver**, and **Community College of Denver**, with one physical library. **Auraria Library** provides research support of all stripes to about 55,000 students (headcount) earning an extraordinary array of degree programs and certificates, from bookkeeping certificates to PhDs in Computer Science. The library is organized into three divisions, Administration, Education, Research and Access, and Technical Services. Technical Services, among many other duties, is charged with overseeing the library's $3.6M learning materials budget. Five teams comprised the Technical Services division: Acquisitions, Access & Discovery, Assessment, Systems, and Special Collections & Digital Initiatives. Due to resignations and retirements in 2014 and 2015, the library's Technical Services division lost nearly a third of its staff while also undergoing several major projects. The team hit the hardest by

the loss in staff was the Acquisitions team, but the entire library was facing challenges. The Systems team was spearheading our library's ILS migration from Millennium to Sierra, major renovation deadlines were causing large weeding projects affecting the Access & Discovery team, and the library was facing a flat budget. With publisher prices increasing an average of 6% annually[1] and no budget increase on the horizon, the library had to identify $170k worth of cancellations. Along with these internal issues, the **Swets** bankruptcy intensely affected one of our sister campuses which reverberated through the system libraries. This bankruptcy resulted in the implementation of a new procurement system that included more university oversight and (of course!) more work within the library. On top of this, the library was wading through several new Patron Driven Acquisitions (PDA) programs and had just implemented the first ever consortia streaming video Evidence Based Acquisitions (EBA) program, a program that turned out to be bumpier and more complicated than anticipated. Moreover, we wondered why we were losing so many people! The combination of all these factors pushed us to take a closer look at our organizational structure.

The leadership at **Auraria** has historically been supportive of examining its organizational structure and reassessing work. Appreciative Inquiry, a change management approach, had been implemented by a previous Director and used in various departments to examine what was or was not working. Appreciative Inquiry is meant to engage staff members by exploring best work experiences, best team experiences, and best user experiences through a variety of queries.[2] Questions such as "What is and isn't working well within the department right now?" were used to help inform the reorganization process.

The major projects in which the library was involved, along with the large staffing changes was challenging, but if **Auraria** knows anything it is that a challenge can also be an opportunity. These library wide projects and the loss of so much staff demanded better communication, an examination of e-resources processing workflows, cross training, and closer relationships among staff members. This was an opportunity to reassess the divisions between the teams, the handoff of materials from Acquisitions to Access & Discovery, and the identity of multiple teams within Technical Services. (See Figure 1.)

The Process

When the Head of Acquisitions left to pursue another opportunity, the Head of Access and Discovery saw that as an opportunity to reorganize. She suspected that if the Acquisitions, Access & Discovery, and Assessment teams merged, communication would be improve, there would be more opportunities for cross training, and silos would be eliminated. Merging these three teams is not new. Many other libraries were heading in this direction, and in fact, Auraria had piloted a similar idea years before by creating a small e-resources team. That team was eventually dissolved because it was small and its purview only encompassed e-resources. However, in 2015 Auraria spent over 80% of its collections budget on e-resources, and nearly every person working in Technical Services worked with e-resources in some way. Reconstituting a small team that was devoted to electronic formats did not make sense; it would have to be a larger team. The Head of Access and Discovery proposed the idea of merging the three teams to the Associate Director of Technical Services and together they worked on creating a department called Resource Management.

Auraria practices "shared leadership" wherein stakeholders from every nearly every department in the library partake in strategic decision-making. This reorganization had to come before the Shared Leadership Team (SLT) for feedback, buy in, and approval. Through an informal presentation, the Head and Associate Director (AD) explained the benefits of a new structure and shared the new organizational charts. One of the most compelling slides presented depicted the cyclical nature of e-resources. The slide visualized the nature of e-resources and showed how managing them is a continual process that reaches no end until the material is either canceled or removed from the collection. This lifecycle also includes repeated assessment of the resource to make informed decisions about renewal and weeding. The linear structure of Acquisitions handing resources off to Cataloging or Access & Discovery with Collections Assessment tacked onto the process somewhere no longer served the needs of the cyclical electronic world. After approval from SLT, the Head and AD began to implement the changes.

For a team that was always experiencing change (renovation, new software, new job duties), the merge was both welcomed and a challenge. For those staff who worked most

Figure 1: June 2015 Technical Services

closely with e-resources, the reorganization made immediate sense and they could see improvements in their day-to-day work. For staff who worked with more traditional formats, the benefits of the merge were not as apparent. Even today, over a year later, there are workflows that still harken back to the strict divide between Acquisitions duties and Cataloging duties. During this time, a new Acquisitions Librarian was hired and she lead many of the efforts to cross train the new Resource Management department and change workflows to not only create efficiencies, but encourage a team culture.

Outcomes

There have been a myriad of outcomes of the merger. Some of the outcomes have to do with organizational culture of the new department. Coming together as one department has encouraged relationship building, recognizing the work of others, and understanding one's role in the entire e-resources lifecycle and therefore their place in the mission of the library.

Other outcomes are more tactile. Merging the departments has given both the Head and Acquisitions Librarian a bird's eye perspective about the entire department. From this vantage point, they can better recognize obstacles in work or process that impede timely processing. In addition, because everyone is on the same team they can implement changes without having to go through others, such as getting the okay from supervisors. One such change involved the database trial workflow. Previously, the Collection Development Librarians requested trials and staff in Acquisitions would set them up, bypassing any off campus access testing. This resulted in some resources being purchased that could not work with the library's authentication system. The Head of Resource Management changed the trial workflow so that trials mimic the workflow of a purchased resource: off-campus access is checked, discovery is investigated, the ability to access usage statistics is verified, and there are no surprises when the resource is purchased. Recognizing this potential improvement, drawing a connection between the trial process and the resulting access problems, was possible because of that bird's eye view of the entire e-resources workflow. Implementing the change was easy because the members of the team understood their role and the workflow mimicked an existing one. This example also elucidates one of the most important reasons for this merger, which is to minimize the time between purchase and discovery, to make new resources available to students, scholars, and faculty as soon as possible.

While overall the merger has been successful, it is always important to recognize areas for improvement. First, changes like these are more successful when the staff understand the reasons for the change and are able to be flexible when problems arise, new processes are created, and new communica-
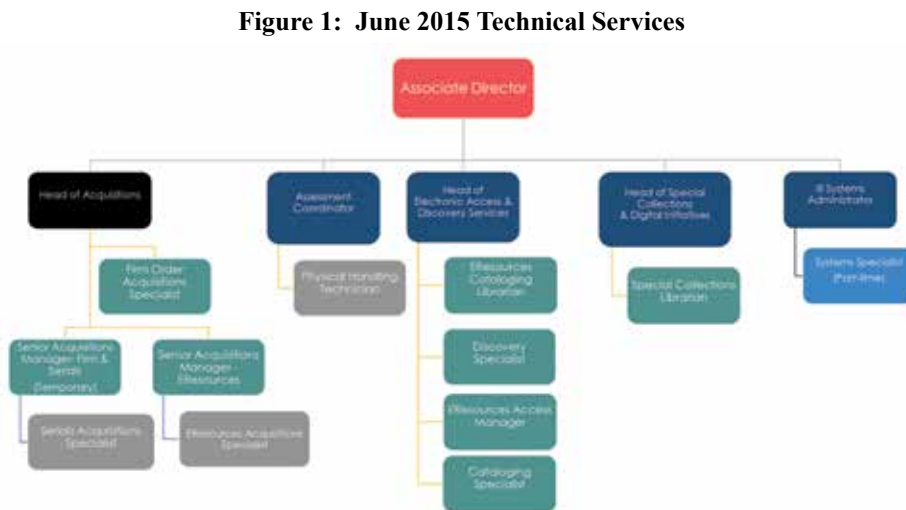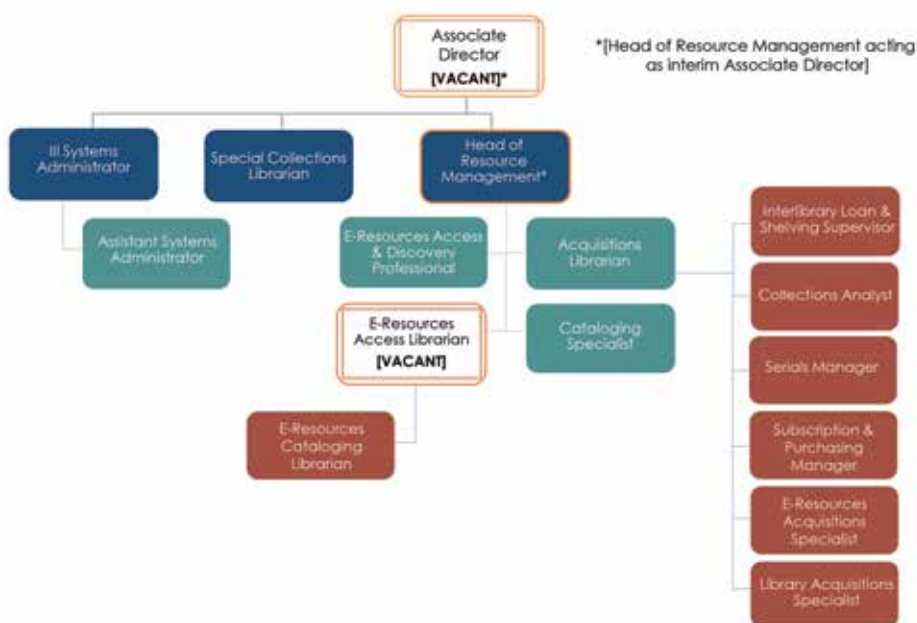
Figure 2: February 2017 Technical Services

tion methods falter. Auraria could not have reorganized in this way without a great team that has these qualities. However, even over a year later, the team still has signs of the silos and communication issues that inspired the merge. Even the department name, Resource Management, is not used across the department let alone across the library. It appears on the staff directory and in organizational charts, but the differentiation of staff who work in Acquisitions and Cataloging still exists in people's minds and language. There are also workflows that have not (yet!) received review through the Resource Management lens. A recent example is the processing of rush items, an infrequent occurrence that has been in place for years. The process suddenly broke down and, though most of it resides in the Resource Management department, it was difficult to get it working again because of old ideas of when Acquisitions work ends and Cataloging work begins. Through a survey conducted by the Acquisitions Librarian and Head of Resource

Management about the merge, though it was resoundingly positive, there were definite themes of problematic communication that still exist within the team. The Acquisitions Librarian is interested in conducting "stay interviews" with current staff for various reasons, one of which is to gain insight into how the merged teams are functioning.
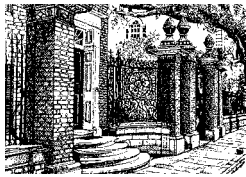
The Future

Recognizing that there are synergies around acquiring resources, whether from vendors or from other libraries, the ILL and Stacks Management teams have now joined Resource Management. This union will provide a holistic understanding of the collections lifecycle, creating the ability to analyze existing workflows and tools to maximize staff efficiencies. Prior to this most recent merger the departments had very separate workflows and did not interact on a regular basis, though they shared many of the same software systems, interfaced

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when there were access problems, and relied on some of the same information, such as license agreements and collections assessment. Collections Assessment, which fell under Resource Management, had not included a regular analysis of ILL. Similarly, licensing, which is also a part of Resource Management, did not have a workflow in place to inform ILL which e-resources included ILL rights, and as a result the ILL team had only been loaning print materials, a fraction of the total resources available. (See Figure 2.)

Our goals in the upcoming year are to start a regular assessment of ILL and review our licenses to determine which e-resources include ILL permissions and start opening those up for lending. While it may seem overwhelming taking on additional teams and staff members, it also provides opportunity for improving processes and customer service for patrons. For those that find themselves in a challenging year due to staff shortages or an overabundance of projects we recommend viewing each challenge as an opportunity and implementing tools like Appreciative Inquiry to help inform organizational structure, practicing shared leadership in decision-making, and conducing stay interviews to ensure your current staff are being heard. Most importantly stay flexible to remain sane during stressful times and when you have the opportunity to hire, look for staff that can embrace change.

By the time you read this article, we may very well be welcoming another team to our department! 🌺

Endnotes
1. **Bosch, Stephen**, and **Kittie Henderson**. "Fracking the Ecosystem." *Library Journal*, vol. 141, no. 7, 2016., pp. 32.
2. **Somerville, MM**. "Digital Age Discoverability: A Collaborative Organizational Approach." *SERIALS REVIEW*, vol. 39, no. 4, 2013., pp. 234-239. doi:10.1080/00987913.2013.10766404

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Given the nature of the process, it is important for the library to monitor usage throughout the year and notify the sales rep and/or customer service if there are any issues to deal with. Waiting until the renewal notice shows up to discuss an issue is usually too late. The company wants the library to get maximum usage of their databases and will be helpful and supportive to accomplish this goal.

Aggregators, publishers of eContent and the myriad amount of companies selling databases to libraries depend on customer input to refine their offerings, make suggestions on improvement and most importantly want to know when their efforts are rewarding for the library's user community. That's why in this industry the lines of communication between publisher and library need to be a two-way street.

In the age of CRM's, customer service people as well as salespeople and senior management are required to document the conversations between the customer and the company. Those conversations are carefully documented and reviewed so that issues are known early in the process and those issues can be dealt with in an expeditious manner.

- Be in communication so that both the library and the publisher's goals are met.

The yardstick in measuring the success or failure of databases sold to the library rests in the interpretation of the usage reports. Most information industry companies allow the customer to check on the statistics. However, if there is no one at the library to run the usage reports, then a quick call to the sales rep or customer service department will solve that. Understanding the trends in usage is important for both the customer in making a renewal decision and the company to analyze and make improvements to the product.

Thinking about the appropriate song lyric to close this article, the choice was easy. "Keep the Customer Satisfied" written by **Paul Simon**, performed by **Simon & Garfunkel**, the song says, "Everywhere I go,