

Chasing the Hedgehog

An Innovative Process for Reorganization of a University Library

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Setting the Change Stage

The University of Texas Arlington (UTA) is a Carnegie R-1 university located in the heart of the Dallas–Fort Worth (DFW) metroplex. The UTA Libraries serve a current student population of over 54,000, in both on-campus and online degree programs. Prior to 2012, the library was traditional in its structure, having separate public services and technical services staff. Public services included Access Services, Information Services, Information Literacy, and Special Collections departments, as well as branch managers for the two satellite libraries on campus, Science and Engineering and Architecture and Fine Arts. Technical services departments included Metadata Services, Information Resources, and Digital Library Services, with Library Systems and Administration supporting all departments. In 2012, the UTA Libraries hired a new Dean of Libraries. The hiring committee for the new dean actively sought out candidates who were change agents and who expressed a vision of the academic library of the future. The broad perception was that change was necessary in order for the library to increase visibility and remain relevant on campus. The new dean came to the job with a clear mandate to help the library create a more relevant vision that would be more connected to the university's strategic goals. Under the dean's guidance, in 2013 the library's leadership team began a process that used Jim Collins's book *Good to Great* as a framework for setting a new strategic direction and realigning the organization's structure to support this new direction.¹ The entire library staff was invited to change perspective by collectively reading and discussing Jim Collins's book and to join the journey in developing a new vision. This new vision would guide the major reorganization that would take place within the next six months.

I. Warm-up Phase

STAGE 1: ESTABLISHING A SENSE OF URGENCY

The framework provided by Collins' book is based upon disciplined people, disciplined thought, and disciplined action. With new leadership at the library and the university, there was an opportunity for the library to better realign itself for long-term success. In the 2012 Association of College and Research Libraries (ACRL) Research Planning and Review Committee report, ten trends were identified.² While all of them struck a chord with the library, the three most immediately relevant were communicating value, prioritizing user behaviors and expectations, and patron-driven acquisition. For example, the need to communicate value to campus partners was very evident because there had been some clear indicators that the library was missing out on critical partnerships across campus. One of these indicators was that, although the library was well respected as a provider of resources and comfortable spaces, no one thought to include the library when planning began for a huge expansion in the online nursing program being offered at the university. Campus leaders making these plans did not think to invite the leadership of the library into the discussions, and thus had no information about the financial and human capital support that the library would provide to the online evidence-based nursing program. This example highlighted the need for the library to be considered an active and strategic partner in the university community. The arrival of a new dean was the beginning of the process that would move the library forward. The dean's participation in the university provost's deans' council was a strong initial step in connecting the library to the work of the campus.

In the first year, the dean created nine task forces, involving over 85 percent of library staff, with charges that were designed to help library staff engage with the idea of a different direction and to ensure that the library had an authentic understanding of the user community. The charges included reviews of best practices in several areas at peer and aspirational institutions and ethnographic observations of facility usage and user activities outside the library related to learning and research. Based on this new information, as well as other data sources from the university and the community, it was clear that the library was not addressing key factors that would increase student success, both academically and professionally. Among the critical needs noted as key to student research and study activity were space and access to power sources, as well as late-night availability of food and coffee.

STAGE 2: CREATING THE GUIDING COALITION

Rather than choosing a small subset of staff or leaders from the library, the dean chose as the guiding coalition for the library's change effort the existing leadership team, comprised of the dean, the associate dean, and the ten department coordinators, as department heads were then called. The departments at the time were Metadata Services, Digital Library Services, Access Services, Information Resources, Information Services, Information Literacy, Library Systems, Library Administration, and two branches—the Science and Engineering Library and the Architecture and Fine Arts Library. Other than the new dean, the leadership team had been working as a group with no changes for more than two years and had established relationships and trust within their departments

and the organization. Not unlike the typical academic library, with over one hundred staff in ten departments across five facilities, the library had inevitable silos and areas of opportunity for greater collaboration. Because of the mandate for change that was clearly visible in the dean's hiring process, it was generally expected that there would be some form of reorganization of the library. The involvement of over 85 percent of the staff in the initial task forces greatly contributed to an increased understanding of the need for change, but the unknown final product was also a source of great anxiety for many staff.

STAGE 3: DEVELOPING A VISION AND STRATEGY

The driving goal for the leadership team was the creation of a user-centered organization where innovation was a hallmark. In *Good to Great*, Collins calls this intense focus a “hedgehog.” The idea is drawn from Isaiah Berlin’s 1953 essay “The Hedgehog and the Fox” and attributed to the Greek poet Archilochus: “The fox knows many things, but the hedgehog knows one big thing.”³ The strength of the hedgehog, as Collins relates, is in its single-minded focus.⁴ The leadership team wanted to choose a vision that the library could be passionate about, that the library could be extraordinary at, and that could be sustained. What was the one thing that the library could do better than anyone in the university community?

Using the concept of disciplined thought from *Good to Great*, the leadership team began by confronting the brutal facts. Using a week-long on-site retreat as a catalyst, the leadership team reviewed a variety of data sources to inform the new vision. Beginning with the data that had been acquired from the ethnographic study of the population, the team used a compiled list of things called “What we know and what we think” to guide its understanding of user needs and expectations. Institutional reports such as the National Survey of Student Engagement and the annual Student Experience Survey administered by institutional planning provided a rich local perspective on students’ needs and perceptions. The annual survey of the National Association of Colleges and Employers provided clear information about what qualities employers wanted in new employees, which prompted discussions about how the library might engage with student preparation for life after college. Observations of student preferences for space and research support on campus and academic trends at the university and beyond indicated a strong bias toward technology and innovation. Using all of the available data and what it believed that the library could be the best at, the leadership team defined the new vision as CXI—Creation, eXploration and Innovation. The plan was to complete the reorganization and make necessary changes during the summer session so as to have the least impact on users once the new fall semester began. The entire process, from developing the new vision to creating new departments to reflect that vision, took five months from beginning to end. This was the first in a series of changes that would occur regularly over the next five years.

STAGE 4: COMMUNICATING THE CHANGE VISION

While staff broadly understood that change was part of the new dean's direction, many feared what that might look like, and leaders were actively working to bolster confidence and increase communication to support the coming transitions. Coordinators had weekly

staff meetings to share all of the available information throughout the first year, and also sent updates via email during the week-long planning process. The dean's weekly "state of the library" email to all staff was designed to keep the communication lines open throughout the library while updating staff on plans and activities and encouraging them to communicate their thoughts and ideas to anyone on the leadership team. As soon as the leadership team decided that CXI was going to be the library's hedgehog moving forward, it began to communicate this information to all staff. At the conclusion of the planning meeting, department coordinators began to meet with their staff and discuss the vision and the process that would help the library to achieve it. The planning process had identified many skills as critical to the achievement of the vision. These skills were then combined into functions, and the functions consolidated into roles. A list of 283 unique skills identified as being those that would move the vision forward was offered to all staff as a self-assessment of knowledge, skills, abilities, and preferences, which we called the KSAP. Additionally, staff were provided a list of roles that would support the new vision from which they could choose (see figures 8.1 and 8.2).

KSAP Skills and Workstyles Preferences Self-Assessment

Workstyles Preferences Self-Assessment

This is a section where you say what your preferences are for a wide variety of situations and aspects of work here in the library. It focuses on what you enjoy rather than what you know.

REMEMBER: there are NO RIGHT OR WRONG ANSWERS. Please be honest! Nobody enjoys everything, and that's ok!

*PR1 Communicating via email

1 Dislike 2 Enjoy a little 3 Enjoy a lot 4 Love this! 0 Not sure

*PR2 Communicating via IM/text

1 Dislike 2 Enjoy a little 3 Enjoy a lot 4 Love this! 0 Not sure

*PR3 Communicating by phone

1 Dislike 2 Enjoy a little 3 Enjoy a lot 4 Love this! 0 Not sure

FIGURE 8.1

Work styles preferences example 1

*PR107 Analyzing large amounts of data

1 Dislike 2 Enjoy a little 3 Enjoy a lot 4 Love this! 0 Not sure

*PR108 Teaching information literacy skills

1 Dislike 2 Enjoy a little 3 Enjoy a lot 4 Love this! 0 Not sure

*PR109 In-depth faculty and PhD student research

1 Dislike 2 Enjoy a little 3 Enjoy a lot 4 Love this! 0 Not sure

*PR110 Answering statistics, data, or GIS questions

1 Dislike 2 Enjoy a little 3 Enjoy a lot 4 Love this! 0 Not sure

FIGURE 8.2

Work styles preferences example 2

This list included department head roles, but no organizational structure was defined at the time. All library staff were sent two surveys to complete that would inform the dean's decision about their new roles in the library. Along with completing the KSAP, each staff member completed a survey indicating his or her prioritized top seven job preferences and bottom five choices of jobs (figures 8.3 and 8.4), and was asked to select up to four areas of leadership that he or she would like to engage in as part of the new vision. There were sixty-three roles available in support of the vision that encompassed forty-three professional positions and seventy-two classified staff positions. Fifty-three leadership areas were available, and staff also had the opportunity to suggest a new area as part of the process.

RespondentID	First Question: Choose your TOP 7 choices for jobs. These are jobs that you will love doing and that will make you happy. Copy the job position numbers and titles from the list and paste into the textboxes below.						
2654255176	Administrative Assistant	Budget, Accounting Clerk	Human Resources Specialist I	Human Resource Specialist II	Staff Development	Budget Officer	Facilities Assistant
2659549536	Archivist/Liaison	2. Disciplinary Liaison: Arts & Humanities	3. Book Repair and Conservation Assistant	4. Grant Writer	5. Metadata Specialist	6. Photographic Access Assistant	7. Interdisciplinary Liaison: K-12
2658321305	Archivist/Liaison	Department Head: Special Collections & Archives	Data Management & Curation	Digital Projects Librarian	Interdisciplinary Liaison: Digital Humanities	Interdisciplinary Liaison: Government Documents	

FIGURE 8.3
Role selection result sample

Second Question: Choose your BOTTOM 5 choices for jobs. These are jobs that you absolutely do NOT want to do and that will make you very unhappy. Copy the job position numbers and titles from the list and paste into the textboxes below. These 5 are in no particular order.				
5 Jobs I Do Not Want				
1. I don't want to do:	2. I don't want to do:	3. I don't want to do:	4. I don't want to do:	5. I don't want to do:
Archivist/Liaison	Liaison	Programmer/Analyst	Serials Acquisitions Assistant	LCD Management
Events Specialist	Communications Assistant	Marketing Coordinator	Exhibits Designer I	Web & Digital Specialist

FIGURE 8.4
Role selection choices sample

All positions were structurally agnostic, as no one except the dean knew the final organizational structure, and every position, except the dean, the associate dean, and a digital research fellow, was on the table. The surveys were sent out in April and were due back in two weeks. After receiving the survey responses, the dean met with all staff members individually to discuss their preferences and role choices so that each staff

member would have an opportunity to articulate why he or she selected or did not select a particular role. After these individual meetings were completed, the dean made the decision as to which role each person would fill. Members of library leadership were informed about their new roles on a Friday, and the remainder of the staff were informed the following Monday. The new leadership team created by the reorganization had its first meeting the following week in the form of a two-day leadership development retreat. The overall organizational structure was revealed to the leadership team at the retreat. After clarification and discussion about how the structure would support the achievement of CXI, the structure was released to all staff at the end of that week. After the two-day training, previous department coordinators then met with the staff in their old departments individually to facilitate the transition by explaining roles and answering transition-related questions. One of the key elements that the dean wanted the leadership team to convey to staff was that the change was not an indictment of the past, but a need to focus on the future. The first expression of the new direction was to communicate the library's value to the university community by demonstrating the clear and direct connections that CXI had to the university's strategic priorities. With a new president, the university was embarking on the development of a new strategic plan, and the library's first priority was to align many of its activities with this new plan.

II. Introducing New Practices Phase

STAGE 5: EMPOWERING BROAD-BASED ACTION

The most evident initial barrier to change was the emotional attachment that staff had to doing the jobs that they had been originally hired for and had been doing well for years. New leaders lacked experience in how to manage staff and processes in a time of high transition. Continuing communication about the need for change was required and was delegated down to the department level in most cases. New department heads were challenged to explain to each staff member how his or her past contributions had laid the foundation for the good work required in the future. Additionally, many staff members needed to develop new skills for their new roles and were uncertain as to how they would be evaluated on their performance in those new roles and whether they could even be successful doing the work required. One unforeseen consequence of the reorganization was a shortage of staff to provide research and instructional support. As a temporary measure, the dean asked six librarians who were assigned to non-public services roles and who had indicated that liaison roles were in their bottom five choices of jobs to provide part-time public services support to students and faculty. Although the dean spoke one on one with each of these six librarians, this conflict of expectations impacted their trust in the organization and the leadership moving forward.

A follow-up evaluation of the assignment process showed that 86.5 percent of staff members got a role that was in their top three choices, with 62.8 percent getting their top choice, and no one was permanently assigned to a role that was among their bottom five. One lesson learned after the process was complete was that it was critically important to manage expectations in a time of transition. Some of the organizational challenges inherent in such dramatic change were exacerbated by the perception of some staff that the transition was as simple as stepping from one role into another, without considering the needs of the library's users.

One of the guiding principles for the libraries is “perpetual beta,” and the organization itself has continued to change and develop. In some cases, staff chose to change roles or were moved involuntarily to different roles for a better fit, and departments continued to be created, shifted, or realigned to move strategic priorities forward. While every effort was made to honor a staff member’s passions in the initial assignments, in some cases the staff member didn’t have the necessary skills or abilities, thus requiring additional role changes.

STAGE 6: GENERATING SHORT-TERM WINS

An immediate short-term win was the activity that the new leadership team undertook to begin to develop relationships and trust. An outside consultant came to meet with the team to conduct self-assessments and team-building activities over the following six weeks. Being in an environment where truth telling was encouraged helped leaders to overcome transition difficulties and gain confidence moving forward. Later short-term wins came as a result of the new leadership team’s creation of forty-nine initiatives that were divided into three broad categories: Strategic, Operational, and Accountability. These initiatives supported the library’s vision and direction of the library leading into the twenty-first-century era of innovation, data, risk taking and the library’s overall strategic goals. A very ambitious agenda was set for the first year.

One initial success was in creating an organizational structure that included departments with names and functions that clearly connected to CXI. For example, Information Resources and Metadata Services were merged to become Access and Discovery (A&D). The focus of this new department would be providing access to resources, not ownership. A previously completed analysis of monographic acquisitions for the decade prior had revealed that almost 65 percent of the books that the library had purchased had never been checked out. This analysis was a driving factor in the implementation of a new acquisitions model of patron-driven acquisition (PDA) of resources, instead of the traditional approval plan model based upon what librarians thought the community needed. One result of this change to the acquisition model was the elimination of subject-specific collection development librarians.

Another win for library users was when Access Services became User Engagement Services (UES). With this move was the formation of the Consolidated Service Point (CSP), an initiative that helped combine circulation and reference services into one service point at all library locations. Also included in the CSP was the addition of a help desk in collaboration with the university’s Office of Information Technology (OIT). This consolidation was designed to provide users with a single location for technology- or service-related questions and was in response to user comments and feedback during the discovery phase of the reorganization.

An additional significant change was that librarians with reference, information literacy, and collection development responsibilities were joined under one group, Outreach and Scholarship (O&S). The O&S department was broken into three disciplinary areas (Social Sciences, Arts and Humanities, and STEM) with department heads for each area. The task force investigation of the prior year had learned that libraries of a similar size were increasingly adopting a model that combined all three aspects of librarianship and their responsibilities. The library’s previous organization had a separate department

for each function, which had reinforced silos and encouraged territoriality within the library, rather than promoting a user-centered focus.

During the six months following the reorganization, priority was given to transitioning staff to new roles and in many cases new work spaces, with the continual reinforcement that what was being done was to the benefit of library users. For example, because of the lack of staff in the new UES department, many staff members from the previous Access Services department were asked to fill in at the various service points during the fall semester until new staff could be hired and trained to take over these duties.

Additionally, new departments specifically designed to support the vision were created. In support of the goals of access and discovery, the new Digital Creation department focused on making unique library resources visible, discoverable, and globally accessible. The new Marketing and Communication department was formed to assist in telling the library's stories internally, to the university community, and beyond. A Director of Grants was appointed to increase staff knowledge about grants and to increase grant proposal submissions. With a focus on evidence-based decision-making, three librarians were initially appointed as assessment directors.

Other short-term wins from the first reorganization included the installation of security gates and card swipe access at the entrance of the Central Library; the movement of eighty-three staff to new positions and the related opportunities for them to learn new skills; creation of a graduate student resource delivery service; and the implementation of a graduate student-only study area on the fifth floor.

STAGE 7: CONSOLIDATING GAINS AND PRODUCING MORE CHANGE

The primary strategy used to maintain momentum was one of continual motion. While the previous twelve months had seen major change across the library, a number of areas of strategic focus had not yet been addressed. In order to focus more clearly on creation and experiential learning, the dean and the associate university librarian began planning for a makerspace in the Central Library. This later developed into an MIT-affiliated Fabrication Laboratory, or FabLab. The FabLab's goal was to be a creative applied-learning environment for UTA students and the local community.

Staff from around the organization were hired to develop and then operate the FabLab in its initial iteration.

The liaison model was also reimagined to address experiential teaching and learning rather than traditional information literacy and bibliographic instruction. O&S was dissolved and became two new departments, Experiential Learning and Undergraduate Research (ELUR) and Faculty, Services and Online Engagement (FSOE), designed to focus on services and support for two specific constituent groups on campus.

A sign that an organization is successful is that its staff are highly motivated and positively engaged. The Organizational, Wellness and Development (OWD) program was developed, placing emphasis on creating programs that would increase morale and engagement of library staff.

Change of any kind can be disruptive even to motivated and positive staff. Creating an environment where staff feel valued and are encouraged to grow in their job skills, while cultivating relationships with colleagues and collaborating on projects in support of the library's goals, is key to having engaged staff.

A big step forward in the second year was the hiring of a new administrator, the Associate University Librarian (AUL), who would develop the library’s scholarly communications activities. This AUL supervises Special Collections, Digital Creation, and two new groups, Publishing, and Data and Research Services. The Scholarly Communications division expands the resonance of faculty and graduate student scholarship and research by developing, advocating for, and educating about emerging forms of scholarly communication.

III. Grounding Phase

STAGE 8: ANCHORING NEW APPROACHES IN THE CULTURE

In the intervening five years, several steps have been taken to help anchor the changes and propel the library forward. These include the institution of several new staff awards, designed to reward innovation and highlight the values of the organization. Also, the fairly reliable annual merit increase process began to be more clearly connected to

the library’s values and innovation, as supervisors used a rubric to evaluate an employee’s contributions in their recommendations for increases. Additionally, the dean and the assessment director attended many departmental staff meetings to share the “Strategy Tree” (figure 8.5) and discuss how each role and function within the library had an impact on the strategic plan. Weekly meetings of the leadership team continued for the first two years, which increased cohesiveness and understanding about activities across the library.



FIGURE 8.5
UTA Libraries Strategy visualization

Analysis and Conclusions

The new organization is dramatically changed from its previous structure and focus. Team compositions changed, leadership changed, and 94 percent of the library staff changed roles. Most staff, including leadership, needed to develop additional skills for

their new roles, and this caused a high level of uncertainty during the transition. Several physical spaces were renovated to accommodate newly formed campus partnerships. While there were some short-term wins, the realities of a 24/5 operation combined with resistance to change made momentum slower to achieve. New programs and services have been developed and implemented, and some increase in staff engagement and support is evident. The library continues to tweak its structure to better address its strategic goals. Change has not been without its long-term impact. At the beginning of the reorganization in 2013, 109 staff were employed at the libraries. Eighty-five of those staff members have left over five years, along with an additional thirty-eight who were hired during the intervening time. These departures and the inability to hire new staff to fill gaps has caused a delay in moving the vision forward. As Kotter has reflected, the process of creating and realizing a vision can often take months or even years to complete.⁵ Failing to thoroughly complete any one phase will cause subsequent phases to falter as well. While having a perpetual beta perspective is vital for innovation, it can also mean that goals and expectations will rapidly change, causing additional stress.

By using the Kotter model as a tool for evaluating the library's organizational change, we see evidence of the execution of parts of Stages 1 through 6, but success in Stages 7 and 8 is less clearly defined. The guiding coalition did a very good job of confronting the brutal facts and understanding the current environment and the challenges of the future. Initial successes revolved around near-constant communication leading up to and during the initial phases of the change. However, with no clear mandate or structure to continue the hard work of communication after the reorganization, clear communication was quickly subsumed by the ambitious strategic activities.

Using a framework like the one provided by the Kotter model of change may have reduced some of the ensuing difficulties that this organization experienced. While the achievement of the original vision has been largely successful, organizational change is still a work in progress.

Notes

1. James C. Collins, *Good to Great: Why Some Companies Make the Leap—and Others Don't* (New York: Harper Business, 2001).
2. ACRL Research Planning and Review Committee, "2012 Top Trends in Academic Libraries: A Review of the Trends and Issues Affecting Academic Libraries in Higher Education," *College and Research Libraries News* 73, no. 6 (June 2012), 311-20, <https://doi.org/10.5860/crln.73.6.8773>.
3. Isaiah Berlin, *The Hedgehog and the Fox* (Chicago: Elephant Paperbacks, 1993), quoted in Collins, *Good to Great*, 2001, 90.
4. Collins, *Good to Great*, 2001, 91.
5. John P. Kotter, *Leading Change* (Boston: Harvard Business Review Press, 1996), 23.

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