Redesigning a Library's Organizational Structure 1

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The evolution from print to electronic resources and services continues to pose significant challenges for academic libraries. This article presents a systematic, evidence-based approach to guide this transition, which resulted in an exhaustive reorganization of library staffing and services. The approach begins with the necessity of accumulating and then evaluating data on staff workloads and responsibilities. At the University of Texas Southwestern Medical Center at Dallas Library, this evaluation revealed that a preponderant amount of time was still spent on print-related activities that were no longer considered to be library priorities. The corrective actions taken to remedy this misalignment are then discussed.

As libraries struggle to define their roles for the future, they must carefully evaluate and reposition staff resources to best support changing areas of focus. In order to make informed staffing allocations, libraries first must clarify the direction of change desired and then provide strong leadership to direct the change using a well-constructed process for planning and guidance.

Like many other libraries in recent years, the provision of digital resources and services had become the focus of The University of Texas (UT) Southwestern Medical Center at Dallas Library. Some authors have viewed the advent of electronic resources as indicative of a growing trend, where technology will drive the direction taken by libraries in the future.[1–3] Despite such predictions and an expanding digital focus at UT Southwestern, many library staff frequently viewed support of print resources as their primary responsibility and digital support as a secondary task. An outdated organizational structure, which had been in place since 1998, encouraged this approach. As staffing support needed for the library's digital collection and initiatives

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had grown, the organization's structure had stagnated.

Also, the library's vision statement—"Give every member of the UT Southwestern community biomedical information that makes a difference"—had not changed since 1996. Although easily communicated, the vision was ambiguous and provided inadequate direction for staff. This resulted in frequent tension and delays in the completion of projects, often due to competing initiatives that were compatible with the mission but lacked unifying direction. In *Leading Change,* John P. Kotter wrote that a vision statement can be used not only to guide, but also to mobilize the staff in a consistent direction and to coordinate activities.[4] The absence of such a vision statement can result in a lack of unity and operations that are not aligned with the underlying purpose of the library. Such was the experience of the University of California at Irvine in the mid-1990s and at UT Southwestern in the early 2000s.[5]

Complicating the situation at UT Southwestern was a vacancy in the library directorship and no plan for action. Although library managers were hesitant to introduce major change without input from a new director and an evidence-based approach to determine the changes needed, they recognized that a more effective organizational structure was needed to focus staff on doing the "right" things (effectiveness) and improving methods for doing the "right" things well (efficiency).

In the fall of 2002, the library managers concluded that a thorough assessment of the library's organizational structure needed to move forward immediately, despite the absence of a director. A comprehensive project, referred to as the Organizational Efficacy Initiative, would be implemented to gather evidence and provide guidance for the changes needed. The project's goal was as follows: "Have

the right people in the right number of jobs (allocated to the right tasks) to best support our current environment and the Library's stated vision for the future." Above all, efforts needed to ensure that staff were focused on doing the right things, not simply doing things right.

The type of organizational changes contemplated at UT Southwestern clearly required the strongest possible leadership to succeed. This point, insisted on by Kotter, also was found to be a "key success factor" in the organizational change effort at the Harvard College Library in the early 1990s.[6,7] Following Kotter's recommendations, the library managers established a strong guiding coalition to provide the necessary leadership for the project.[8] Coalition members were chosen based on their varied experience, analytical skills, consensus-building abilities, and capacity to approach problems with a global perspective.

This article shares the process used to assess the organizational structure of a major academic medical library, which employs fifty-five full-time equivalents (FTEs) and two part-time staff. The project is placed in the context of current literature, and the article discusses the project methodology developed at UT Southwestern. The authors share practices that worked well and lessons learned, along with strategies used to manage change successfully. Finally, the authors review the changes introduced and discuss areas where work continues.

Literature Review

To support this project, staff conducted a literature search on two related topics: organizational change (i.e., "what strategies could be used to conduct a successful reorganization") and the future of libraries (i.e., "what types of services, resources, and skills might ensure the library's future value").

Several articles described how to conduct a far-reaching library reorganization. Susan Lee's account of organizational change at the Harvard College Library and Thomas W. Shaughnessy's description of a major restructuring of the University of Minnesota Libraries provided guidance on managing a change process that could, if not properly led, be disruptive, counterproductive, and destructive.[9,10] Kotter's much-consulted *Leading Change* provided an eight-step process for helping organizations introduce change successfully.[11]

An important element in a major restructuring effort is the involvement of staff.[12,13] Staff participation should be solicited actively, and staff need to be kept informed as projects progress. Kotter pointed out the need for a comprehensive communications plan, opportunities for staff to contribute, and the creation and celebration of momentum-building "short-term wins."[14,15]

The library of the future is often described as overwhelmingly electronic, and the importance of many print resources is perceived to be decreasing. Scott Carlson writes about a controversial corollary development: Widespread end-user searching made possible by these electronic resources will obviate the need for clients to come to the library.[16] Deanna Marcum shares this same view, albeit lacking Carlson's pessimism, describing the library of the future as "less a place where information is stored than an 'information center' through which students and faculty gain access to the vast information resources of the world."[17] She pointed out that these students are likely to be in their labs, classrooms, or at home and that the information they are accessing may be in Tokyo or Paris. H. E. Auret viewed the electronic or digital library as a given and speculated on the ability of librarians to contribute effectively in such an environment.[18]

Other articles have concentrated on the future role of library staff. A technology-driven future that includes remote access to ever-expanding online collections need not result in deserted libraries or in the marginalization of librarians. In a rejoinder to Carlson, Richard Andrew Albanese draws attention to the rising gate counts in many academic libraries, whereas Marcum believes the library will remain at the center of the academic enterprise both in terms of actual location and as the cynosure of its intellectual activity.[19,20] The continued vitality of the library as a congenial place to study, conduct research, collaborate, and socialize raises questions about whether the marginalization or the disintermediation of librarians will follow. A familiar theme in the literature is that the proliferation of electronic information will only increase clients' dependence on librarians. As the number of online resources multiplies and pertinent, high-quality information becomes more difficult to locate, clients will rely increasingly on librarians for their information needs.[21]

A remark made by one of the participants at the Library of Congress Institute on "Reference Service in a Digital Age" (June 29–30, 1998) serves as a bridge to a cognate theme: "There is no such thing as a digital library without a digital librarian."[22] Analyses of job trends indicate that advanced computer skills, proficiency in Web-based resources and services, and the ability to be creative and inventive in an online environment are prerequisites for many library positions.[23,24] Hiring new librarians with these skills and improving already-employed librarians' computer-based abilities is of paramount importance in an electronic environment.[25,26]

Background

In discussions preceding the project, the library managers and other staff identi-

fied a number of concerns with allocation of staff resources:

- a growing gap between the staffing needs for the new digital environment and adequate allocation of staff;
- a problematic team approach that challenged traditional workloads;
- the absence of a clear vision to unify staff efforts.

Shifts in Collections and Staffing Needs

In the early 1990s, print resources were the largest component of the UT Southwestern Library's collection. By 2004, the number of electronic resources had surpassed print and client use had shifted accordingly. The library had one e-journal in 1995; by 2004, it had more than 5,000. The library's most popular journal, *Nature*, illustrated the clients' clear preference for the electronic option. In 2003, *Nature's* electronic version generated more than 51,000 uses, whereas the print version received fewer than 1,300 uses.

The shift from paper to electronic resources clearly affected both individual library staff and department workloads. Some staff members were extremely busy with changes brought about by the new electronic formats; others saw their responsibilities diminish. As no clear organizational structure existed to handle and coordinate the growing number of digital support tasks, responsibilities became splintered among various departments and teams.

The evolution of a few library departments illustrated the workflow issues that surfaced as support needs shifted. In the mid-1990s, a separate department consisting of five FTEs reshelved books and journals and maintained the library's eight photocopiers. By 2003, the number of copiers had declined to five. Reshelving decreased by 55 percent, and client photocopying dropped by 61 percent. These reductions eliminated the need for the same level of staff support. Only two and one-half FTEs were assigned to these same tasks by 2003.

In 1998, the library formed a Web Services Department to manage the increased use of its Web site and other electronic resources. Although this department handled technical development and maintenance, staff from other areas provided the intellectual content for the site as a secondary responsibility. As time passed, this fragmented approach toward the growth and maintenance of an essential digital resource became increasingly problematic.

Troubled Team Processes

The library's long-standing team approach also had become strained. In 1996, the library had adopted a flattened organizational model that assigned many responsibilities to multidisciplinary teams. The team approach had been introduced to provide staff with opportunities to work outside their departments, to promote new ideas, and to increase collaboration among nontraditional functional groups. It was hoped that these experiences would broaden staff perspective and result in greater flexibility and adaptability. Consequently, staff had been encouraged to create and join teams, and a flourishing team network evolved and multiplied.

By 2003, the library had fifteen teams (appendix D1). Although the team structure had evolved over time, existing teams shared the following characteristics:

- *Autonomous*: Teams defined their purpose and scope of responsibilities.
- *Self-organizing*: Staff formed teams based on perceived need; groups selected or solicited members; and teams could cease by agreement of team members.
- *Self-managing*: Team members decided how they would function in terms of leadership and participation.

- *Cross-functional*: Most teams included representatives from varied departments.
- *Functional or task driven*: Teams were formed to support specific functions such as marketing to introduce new services or resources such as remote reference and to develop responses to librarywide concerns such as disaster preparedness.
- *Voluntary*: Although team participation was encouraged, it was not mandatory.

Even though the library's flexible team approach had stimulated staff and generated new ideas and initiatives, a number of concerns with team operations had surfaced by 2003. To begin with, the large number of teams and amount of staff participation had created serious time management challenges for staff. Because teams had gradually assumed much responsibility for the library's digital resources and services, some workloads had increased as team members added routine team responsibilities to their departmental workloads. Virtual Library Team members, for example, had become responsible for both the content and design of the library's extensive Web site. Staff found it increasingly difficult to sort out competing priorities of teams and departments. Staff also voiced concerns with the performance of some teams such as those responsible for staff development and team oversight. By 2003, some staff had started to view the team approach with disfavor and many voiced concerns about team efficiency, focus, and effectiveness.

Unlike department managers, team leaders had little authority and team accountability had not been addressed adequately. Although many teams had advanced library goals successfully, it appeared that more structure was needed to help focus and guide the teams. Philip J. Jones wrote about the need for individual accountability and authority in team-based organizations such as UT Southwestern.[27] His article described precisely those conditions that undermined UT Southwestern's network of teams.

Limited Resources and Blurry Priorities

Budget developments and competing staff initiatives also highlighted the need for change. A poor economic climate and steady journal inflation led to a decreased library budget, and a hiring freeze eliminated the library's options for hiring new staff.[28,29] At the same time, many staff found it increasingly difficult to prioritize additional responsibilities, especially as team activities multiplied. For example, an educator might have the departmental responsibility for developing a new class and the team responsibility for providing critical Web site content. Both were important, but one task inevitably had to take precedence.

Project Overview

The library managers formed an initial Organizational Efficacy Task Force in late 2002 and charged it with (1) formalizing the project's goal and (2) developing a methodology, or project plan. Five managers were selected to serve on the task force, and they completed both objectives within three months and then disbanded.

A new Organizational Efficacy Task Force, which included the newly hired library director plus a more diverse set of library staff, was established to manage the remaining steps in the methodology. For continuity, several members of the initial task force remained on the new task force. After seven months, the task force communicated its recommendations to the staff and the changes were implemented during a two-month transition period. The task force disbanded at the end of the transition period.

Methodology

The project methodology (appendix A) consisted of four broad categories: define goals, plan, implement and monitor, and evaluate. As a first step, the task force defined the overall project goal, clarifying what needed to be accomplished. The next stage was to determine the specific information required for effective decision making. During the third stage, the group gathered and evaluated data, finalized recommendations, and implemented the changes. The final step was to evaluate the changes introduced.

It would be misleading to imply that the project plan was finalized at the beginning of the project. It became evident that the task force needed to treat the methodology as a "work in progress" to maintain its utility. Activities were added or modified as needed, time lines were adjusted, and gaps in the original data-collection scheme were identified and addressed. For the methodology to be most effective, the task force learned to balance flexibility with structure.

Guiding Principles

From the outset, the task force established several guiding principles in support of the methodology. First, objective data would be used as the underlying basis for all decisions. In support of this approach, the group sought targeted evidence documenting areas of inefficiency, overlap, and duplication; time spent on non- or low-priority tasks; and areas needing more manpower.

Second, the task force would solicit and value staff involvement. The group invited input from all staff at various brainstorming sessions librarywide. Other sessions were used to keep staff informed of project progress and to elaborate on requests for information. The task force distributed regular e-mails librarywide, reinforcing the importance of the project.

In addition, a staff suggestion box was introduced, where anonymous comments could be submitted at any time.

A final guiding principle was for a timely completion to the project and the resulting reorganization to minimize disruptions to library operations. Although the original target completion date was delayed by two months, the entire project was completed within one year.

Data Gathering and Evaluation

Information-gathering efforts focused in two areas: how staff time was spent currently, and how it should be spent in the future. By concentrating on the gap between the current staffing allocation and the desired future, the task force created a plan to close the gap. The group used a variety of tools and approaches to gather and analyze evidence to support its decisions:

• *Department charges*: The task force asked department managers to define the stated purpose for their departments. By combining this information with individual job inventories, the task force identified areas of misalignment.

• *Team responsibilities*: The task force asked each team to supply its charge, the amount of time members spent on team activities, and team accomplishments over the past two years. In reviewing these data, the task force assessed each team's relevance to library goals and its overall effectiveness.

• *Current staff allocation*: The task force gathered quantitative data on team and individual activities to determine how responsibilities were distributed among staff in five functional categories: administrative support, information services, collection development, technical support, and organizational processes. These data supplied a broad overview of the current staff allocation for major library functions and revealed areas of

overlapping responsibilities among teams and departments.

• *Individual job inventories (appendix B)*: The task force asked staff members to list their major responsibilities and the percentage of time devoted to each responsibility. After grouping and studying the inventories by department, task force members created summary departmental evaluations, taking into consideration the misallocation of time to tasks, tasks not being done, and tasks that belonged elsewhere.[30]

• *Manager department analyses*: The task force asked managers to assess their individual departments. Managers evaluated their departments' productivity, future department workloads, alignment of tasks with their departments' charge, and overall efficiency of department functions. The task force compared the managers' assessments with those completed by the task force, looking for any relevant issues or concerns not previously considered.

As the task force evaluated the accumulated data that focused primarily on the library's current staffing allocation, members captured ideas that became the basis for the reorganization. The task force developed several documents to help organize the analyzed data:

• tasks needing additional personnel;

• obvious staff and operational changes needed;

• debatable changes requiring additional information;

• talking points for individual managers and staff who would be most impacted by the proposed changes;

• new or modified charges for departments;

• global issues of critical importance to the library as a whole, such as improved business practices and staff training.

The task force simultaneously gathered and evaluated data from various other sources to help clarify the library's future role. Over several months, task force members read articles from the initial literature review and conducted a campus environmental scan. They also reviewed existing client data and brainstormed with the staff. The task force sought evidence to identify areas of increasing or decreasing activity, unmet client needs, future campus directions, and general trends in libraries. All changes to the library's organizational structure were considered in light of these broader environmental findings.

Outcomes

When all the data had been gathered and evaluated, the task force identified the most problematic areas. To begin with, the library had relied heavily on teams to implement and maintain its digital resources and services. The task force felt it was no longer practical to rely solely on teams to handle these responsibilities.

In addition, responsibility for the digital collection was extremely fragmented, with numerous departments, teams, and individuals providing support. The task force determined that a more streamlined approach was needed to improve the efficiency of these operations. Inefficiencies also were noted in other areas, suggesting that the library director and the associate director would need to provide strong managerial guidance to correct specific departmental problems.

As expected, the task force identified numerous concerns with the library's teams. Many teams offered questionable value to the library or were no longer in alignment with the library's new priorities. Some team responsibilities were now considered to be critical, basic library operations, and a new approach was needed to provide routine support for those activities. Moreover, the task force acknowledged problematic team

performance issues such as ineffective leadership skills and the inability to hold team members accountable for nonparticipation and poor performance. Certain teams needed to be dissolved, and new ground rules needed to be established to ensure the success of the remaining and future teams. The few teams that were retained after the reorganization had very specific responsibilities or a proven record of effectiveness; others had strong leaders and enthusiastic members who were appointed rather self-selected.

Finally, the task force recognized that a revamped organizational structure would not be able to address global issues such as inadequate staff training and inefficient budget processes. New strategies were needed to ensure that these issues received attention under the new organizational structure.

Project Objectives

The task force established several objectives, which would be used to assess the success of the project. To begin with, the library's vision needed to be clarified to provide focus and unity for staff efforts. Under the new director's guidance, a more effective vision statement emerged (appendix C) with input from all staff.

Next, to address the project goal and support the revitalized vision statement, the reorganization needed to align staff resources with the new workload realities and the future direction defined for the library. Although task force members approached this as a librarywide concern, they recognized that a special focus was needed for digital collection responsibilities. Because the existing department structure emphasized support of print collections, work was reallocated in both the print and digital support areas.

At the same time, the task force wanted to ensure that each position had an appropriate workload assigned (i.e., neither too much nor too little work assigned to any one person). The group identified areas of inefficiency and internal procedures needing improvement (e.g., accountability). By redistributing workloads from teams to departments, troubled organizational processes were streamlined and made more efficient. The task force also generated long-term strategies to promote and anchor the desired changes.

Innovations

The task force introduced several innovative approaches into the new organizational structure. To prevent a relapse in the areas of organizational effectiveness and efficiency, the task force created a unique Organizational Efficacy Council (OEC) to continue the work of promoting efficacy within the library. Led by the Office of the Director, the OEC included a combination of professional and paraprofessional staff, who were appointed to one-year terms. This new group was charged with proactively monitoring the library for organizational problems, developing responses to global concerns, and overseeing the library's teams and task forces. In addition, the OEC was assigned responsibility for conducting a follow-up evaluation of the reorganization within one year of the implemented changes.

To respond to shifts in staffing needs, the task force recommended several departmental and interdepartmental changes. The library formed two new departments—Digital Access, and Digital Infrastructure Research and Development—to provide focused leadership and support for the expanded digital collection and its underlying infrastructure. To encourage a more flexible staffing structure, the task force developed a new approach where all departments were assigned to one of three regions: Administrative and Technical Support (also

known as the Support Region), Client Contact (Contact Region), and Collections (Collections Region). Regional facilitators were charged with encouraging communication of shared concerns within their regions. As manpower needs shifted, this new mechanism provided a forum for regional cooperation.

Finally, to acknowledge the expanding technical support needs for the library's digital environment, some staff were shifted in an effort to integrate "systems" expertise in areas outside the library's information systems (IS) department. This approach is supported by a recent survey of library systems offices, which questions the assumption that systems-dedicated staff will continue to belong to a single division.[31] New technologies continue to transform technical responsibilities and, in turn, the staffing arrangements needed to provide optimal digital support.

The Revitalized Organization

After examining numerous options, the task force restructured the areas of collection building, both print and electronic, and collection access (appendices D1 and D2). The task force dissolved two existing departments that dealt with print collection processing and Web site development and support. Staff from these and other departments were reconstituted into four new or modified departments:

• Digital Infrastructure Research and Development (new), which handles long-range planning along with research and development for the digital collection infrastructure

• Digital Access (new), which facilitates access to the library's collections through its catalog and Web site

• Print Resource Management and Optimization (new), which addresses book selection and processing, serials processing and binding, and shelving of the print collection

• Acquisitions and Licensing (modified), which manages journal collection development activities and all resource purchasing

Most staff in other departments remained in similar or identical positions, with a few exceptions. The task force recommended staff-sharing plans in some areas and redistributed certain responsibilities to address areas of inefficiency.

Another aspect of the reorganization was the large-scale transfer of responsibilities from teams to departments in order to improve work flow and accountability. In some cases, the activities that teams had been performing now logically belonged to departments. For example, several teams had been responsible for implementing and maintaining electronic resources before the restructuring. Those activities became basic departmental responsibilities in the new organization.

Moreover, to help provide more structure for the library's teams, the task force implemented a process for annual team reviews. Team proposals would be required in advance of the formation of any new teams, and the library's new OEC would provide ongoing oversight to ensure that all teams remained aligned with the library's strategic goals. Task forces, which focus on shorter-term objectives, would be held to the same level of accountability.

As part of the team changes, all but three library teams were sunsetted. These three teams, which were judged to perform tasks that no single department could handle, remained in the new organization:

• Information Resources Development Team, which provides guidance for the purchase of electronic resources and technology

• Corporate Communications Team, which promotes library collections and services

• Technical Liaison Team, which assists the IS department in maintaining staff computers

Initial Staff Reception

Although staff were initially apprehensive about changing job responsibilities, they seemed to welcome the changes and voiced few objections when the new organizational structure was unveiled. Throughout the project, most staff supplied the requested input, such as job inventories and departmental analyses, with frankness and thoughtfulness. The task force attributed the positive reaction among the staff to a number of actions taken by the task force. The group kept all staff informed about the project's progress through numerous librarywide meetings. In addition to providing updates, the task force used the meetings to reinforce the aims of the reorganization, the critical reasons why a new staffing structure was needed, and the urgency of the project. As staff became increasingly familiar with the project, the early anxiety appeared to decrease.

The task force also eliminated staff surprises through successful preparatory efforts. In advance of any librarywide announcements, the director and the associate director met with staff members who would be directly affected by the proposed changes and all department managers. These meetings provided opportunities for staff to share any misgivings, supply comments on the proposed changes, and work toward consensus on the new staff arrangement. The task force did make some minor changes to the original plan in response to staff comments and suggestions.

Although anticipated changes, especially those of this magnitude, will always introduce a certain amount of unease, staff seemed to grasp that the long-term viability of the library depended on its ability to adapt to new circumstances. A reorganized staff structure was one very critical adaptation needed, and, in general, the library staff provided a favorable reception to the revamped organizational structure.

New Round of Strategic Planning

New strategic goals were introduced in January 2004 in support of the clarified vision. Some of the global issues identified during the project, such as the need for improved client data and better business processes, helped define areas where future staffing energy and focus were needed. Quarterly departmental and team strategies are developed to support the new goals.

Lessons Learned

Approximately six months have passed since the reorganization took effect in early September 2003. Though a formal evaluation is still some months away, the process itself taught the authors a number of lessons, namely, that it is important to:

• Create a clear goal at the outset.

• Assemble a guiding coalition to manage the entire project.

• Choose coalition members based on needed skills.

• Develop a unifying vision statement and use it to lead the change.

• Make the project a top priority for the library.

• Document and share the detailed methodology (including target dates) with all staff to provide focus and encourage ongoing communication.

• Keep staff informed and invite staff input. This will ensure a better final plan and greater acceptance of organizational changes.

• Involve the institution's human resources department to determine if there are any conflicts between the library's

goals and broader organizational policies.

- Incorporate transition planning to enable the timely transfer of responsibilities.
- Include a process for follow-up evaluation to ensure that desired outcomes are achieved.
- Recognize that not all problems inherent in a library can be solved by reorganization. Develop a plan to address those issues separately.

Conclusion

Evidence gathered by the task force clearly argued for a revamped organizational structure. Whether the changes introduced are the *right* changes remains to be seen. Given the limited amount of time that has passed since the reorganization, the task force cannot determine if the project's goal has been achieved successfully. A follow-up article will report on the results of the one-year evaluation and the overall success or failure of the 2003 reorganization.

Although it is premature to draw conclusions about the reorganization's outcome, this project did demonstrate that a process emphasizing evidence, vision, leadership, and flexibility can be developed and applied to a major reorganization effort. A certain amount of subjectivity is involved with any staffing decisions, but the group's use of an evidence-based approach helped to simplify and support the decisions made.

By stressing the importance of the library's vision and addressing its ambiguity as part of the project, staffing decisions also could be aligned with a more clearly defined future direction for the library. As Kotter has stated:

Vision plays a key role in producing useful change by helping to direct, align, and inspire actions on the part of large numbers of people. Without an appropriate vision, a transformation effort can easily dissolve into a list of confusing, incompatible, and time-consuming projects that go in the wrong direction or nowhere at all.[32]

Although organizations must remain vigilant to avoid staff complacency, major staffing changes require strong leadership and guidance. In the case of this project, a diverse, well-chosen task force shared responsibility for achieving an improved organizational structure. At the same time, however, decisions were not made in isolation. The reorganization project had a much better chance of success by involving all staff.

Flexibility with both approaches and resources emerged as an essential element of the project's evolution. Adjusting the project methodology, as needed, resulted in a better outcome. Reorganization decisions also created more flexibility in the library's organizational structure. By creating regions, the task force envisioned a staffing arrangement that could better accommodate shifting manpower. Finally, as has been documented by colleagues at other institutions, the revamped organizational environment must remain flexible, adaptable, and open to further change.[33,34] By introducing a permanent library council to remain focused on efficacy issues, the task force initiated a process for ongoing change.

There continue to be opportunities for libraries to survive and thrive in the years ahead, provided they choose and plan their future directions wisely. Becoming conscientious planners and diligent stewards of all library resources, including staff, ensures that libraries will be able to fulfill their visions in the twenty-first century.

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31. Scott P. Muir and Adriene Lim, *Library Systems Office Organization*, SPEC Kit 271 (Washington, D.C.: Association of Research Libraries, Office of Leadership and Management Services, 2002), 13.

32. Kotter, *Leading Change*, 7.

33. Noreen O. Steele, "Success Factors for Virtual Libraries," *Econtent* 23, no.5 (Oct. 2000). Available online from http://www.findarticles.com/cf_dls/m0BLB/5_23/65803876/p1/ article.jhtml. (Accessed 26 February 2004.)

34. Euster, "Reorganizing for a Changing Information World," 113.

APPENDIX A
Project Methodology

	Step	Activity	Purpose	Completed
Define Goals	1	Clarify task force's charge and project goal. Charge: Clarify issues relating to organizational efficacy and develop a methodology to address those concerns as a future project. **Goal: Have the right people in the right number of jobs (allocated to the right tasks) to best support our current environment and the Library's stated vision for the future.**	Identify what needs to be accomplished	12/02
	2	Report goal and charge to managers.	Communicate	
	3	Define questions to be answered in support of the project.	Identify information needed for effective decision making	
	4	Identify information/activities/tasks needed to provide data to answer the questions in step 3.	Determine how to gather info	
	5	Identify who needs to be involved in step 4 and establish timelines.	Begin "buy-in"	
	6	Reach consensus on remaining steps for methodology.	Finalize proposed methodology to present to managers	
	7	Identify project leader.	Identify leadership	
Plan	8	Present proposed methodology to managers and revise as needed.	Communicate, Reach consensus	1/03
	9	Conduct literature review.	Identify best evidence	
	10	Read, assess, and summarize articles identified in literature review.	Synthesize best evidence	1/03–5/03
	11	Announce project to all library staff by email.	Communicate, Buy-in	2/03
	12	Share plan with all library staff at regularly scheduled staff meetings.	Communicate, Buy-in	

APPENDIX A
Project Methodology

	Step	Activity	Purpose	Completed
Implement and Monitor	13	Gather data and incorporate staff input.	Collect data, Buy-in	2/03–8/03
	14	Analyze data and make preliminary recommendations.	Evaluate data, Determine desired outcomes, Extract main implications for decision making and strategy development	
	15	Provide progress report to all staff at regularly scheduled staff meetings.	Communicate	
	16	Refine recommendations by soliciting targeted feedback from department heads and others to be determined.	Evaluate, Reach consensus, Communicate, Buy-in	
	17	Present preliminary recommendations and solicit feedback from all staff at two back-to-back meetings.	Communicate, Evaluate, Reach consensus	
	18	Communicate final changes to all staff at two back-to-back meetings, which will include a proposed office seating arrangement.	Communicate, Buy-in, Reach consensus	
	19	Begin implementing recommended changes.	Reach desired outcome	9/03–11/03
Evaluate	20	Assess impact of changes; continue planning.	Evaluate outcome	Ongoing

APPENDIX B
Job Inventory

Instructions

PART 1: TASK LIST
- List your major tasks/responsibilities in order by the amount (percentage) of time spent. Group all team participation into one task.
- Supply the percentage of time devoted to each task/responsibility.
- Use the wording from your latest performance appraisal (PA) form for your tasks/responsibilities, updating as needed. If you do not currently have a PA, please discuss the creation of a form with your supervisor. If you list service on the InfoDesk as one of your tasks, describe how you spend your time when there is no InfoDesk client activity.
- Incorporate administrative activities (telephone calls, email) into the time percentage for the task.
- If you devote 5% or more of your time to professional activities, please list this as a separate task.
- Please limit yourself to 6 major tasks/responsibilities.

PART 2: THREE MOST IMPORTANT ACTIVITIES (*To be reviewed by OETF only.*)
Based on your task list and responsibilities, list the three most important activities you perform.

PART 3: HOW TO MAKE BETTER USE OF TIME? (*To be reviewed by OETF only.*)
Describe how the Library could make better use of your time.

PART 4: TEAM/TASK FORCE MEMBERSHIPS
List all your current team and task force memberships.

Name:	**Date:**	**Job Title:**	**Department:**

Part 1: Task List			
1. Time %	Task:		
2. Time %	Task:		
3. Time %	Task:		
4. Time %	Task:		
5. Time %	Task:		
6. Time %	Task:		

Part 2: Three Most Important Activities   (*To be reviewed by OETF only*).

Part 3: How to Make Better Use of Time? (*To be reviewed by OETF only*).

Part 4: Team/Task Force Memberships

APPENDIX C
UT Southwestern Medical Center Library
Vision Statement

Give every member of the UT Southwestern community biomedical information that makes a difference.

Vision clarification:

The focus of our vision is providing information to our clients. This focus encompasses the literature and knowledge of biomedicine in all of its formats and the services provided to communicate the information to our clients. The library's strength lies in the successful juncture of timely, high-quality information resources and carefully designed and evaluated client services.

In order to make a difference, quality information and customer-driven services will be provided at the time of a client's need in a format or manner that is appropriate to the need, regardless of the location of either the client or the information. Providing information and services to local and remote clients, 24 hours a day, is achieved most effectively through digital or electronic means. This is our top priority.

To achieve this priority, we will systematically and continuously identify our clients, where they are, and how we can support their research, education, or patient care missions. We will monitor changes in information content, formats, and delivery mechanisms, proactively adjusting approaches to best meet or exceed clients' expectations. We will strive to provide accurate, responsive service while enabling our clients to be self-reliant and capable of finding and effectively using the information they need to make a difference.

APPENDIX D1
Organizational Chart (Prior to Reorganization)
Spring 2003

Office of the Director
(2 FTE)

Director
&
Associate Director

"Parallel" organization consisted of cross-functional planning and decision-making teams.

Archives Team

Client Contact Database Team

Collection Access Team

Consultation Team

Disaster, Emergency & Contingency Team

Facilities Design Team

Information Resources Development Team

LinkBase Improvement Team

Marketing Team

Remote Reference Team

Staff Development Team

Teams Team

Technical Liaison Team

Virtual Library Team

Wellness Team

"Permanent" organization was divided along functional lines

Administrative Services
(5 FTE)

Catalog, Binding, & Serials
(5.75 FTE)

Campus Outreach Reference & Education
(7 FTE)

Collection & Information Development
(3 FTE)

Document Services
(9 FTE)

Information Desk
(10.75 FTE)

Information Systems
(5 FTE)

Web Services
(4 FTE)

APPENDIX D2
New Organizational Chart
September 2003

Director & Associate Director

Special Projects Librarian

Organization Efficacy Council (OEC)

Director & Associate Director

Special Projects Librarian

Regional Facilitators[1]

1 Faculty Associate/ Other exempt staff
1 classified staff

Teams & Task Forces

Information Resources Development Team

Corporate Communications Team

Technical Liaison Team

Task Forces

Support Region

Director, Associate Director & Special Projects Librarian (3FTE)

Administrative Services (5 FTE)

Information Systems (4.5 FTE)

Collections Region

Digital Access[3] (7 FTE)

Print Resource Mgt & Optimization[4] (6 FTE)

Digital Infrastructure Research & Development[2] (3 FTE)

Acquisitions & Licensing (2 FTE)

Contact Region

Information Desk (9.5 FTE)

Campus Outreach Reference & Education (6 FTE)

Interlibrary Loan (6 FTE)

[1]Each region selects a Regional Facilitator to encourage regional communication and cooperation among department managers and to serve on the OEC
[2]Develops, tests, evaluates and implements strategies for a quality electronic infrastructure
[3]Manages and provides optimal access to and support for Library's digital collections and services
[4]Manages and provides optimal access to and support for Library's print and audiovisual collections