

Taking time for the organization

How IUPUI University Library is building teams

by Mary J. Stanley

On March 8, 1996, the Indiana University-Purdue University Indianapolis (IUPUI) university librarian announced that the library was going to become a team-based organization. This shift was a top-down movement with the teams formed by the senior management including assignment of team leaders and team members. The "storming" stage of teaming began. Individuals who had served in supervisory roles suddenly found themselves as mere team members, and others who had been in supportive roles were suddenly thrust into roles as team leaders. The entire organization was in "culture shock."

Four individuals (three team leaders and one senior manager) were sent to Tucson to attend a conference on the movement to a team-based organization by the library at the University of Arizona. Upon their return to the IUPUI Library, the conference attendees presented a summarized version of the transition to the team leaders and senior management. This was just the beginning of using various tools, techniques, and conferences for staff development.

The concept of the organizational week

As the organization moved forward in the team process, it was decided to set aside one week in August for staff development.

This week was dubbed Organizational Week, and an outside consultant was invited to present a workshop on "Team-building through Effective Group Process Skills." The consultant worked with the entire organization through smaller random groups using various exercises and brainstorming techniques. The consultant also worked separately with the team leaders on basic facilitating skills, group-contracting, and decision-making. The week ended with a luncheon, games, and prizes to celebrate the week's success.

Results from this week of activities were immediately noticeable in the team meetings that followed. Most team meetings were limited to one hour, extending over that period if there were significant issues to discuss. Individuals seemed much more at ease in the facilitation process (plus/delta comments were recorded at the end of each meeting to see the value or changes needed). Plus/delta is an effort to record what has been good during the meeting and what changes are necessary to improve it. Senior management felt positive about the effectiveness and decided to make the experience an ongoing commitment at the end of each semester.

A review of the literature on organizational retreats illustrates that most organizations conduct them only on an annual basis, usually for planning purposes. Many retreats

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involve only upper administration to stimulate strategic planning at the highest level of the organization—the board.¹ This is not a bad concept, but it may miss many voices and perspectives within the organization.

IUPUI University Library seems unique in that its first “retreat” was focused on individual development and not primarily on the planning stage for future library activities. Each member of the staff, whether librarian, clerical, or technical support, was seen as a valued component of an effective, efficient operation. Although planning eventually became part of the organizational week, the first efforts were devoted entirely to the individual staff members as part of the “teaming process.”

Two very different consultants were invited to the second organizational week. One consultant continued the team-building concept and introduced the 90/90 evaluation process. In this process, an individual is reviewed through a reciprocal 90-minute session. This consultant also led the groups into basic steps for developing a foundational matrix of organizational skills. The library staff worked on creating lists of the required and preferred skills that should comprise the basic inventory skills of the members. This inventory was then aligned with the organization’s goals to assist in mapping a path to achieve them.

The focus still centered on the individual but introduced the organization’s goals into the matrix. Individual staff members were required to step “outside the box” in their thinking as they brainstormed with their colleagues on challenging issues.

As stated by Geoffrey James, author of *Business Wisdom of the Electronic Elite*, “Employees are people, not cogs. . . . Give people the basic respect of seeing them as they truly are, and you’ll unleash a flood of enthusiasm and energy.”² Such responses were definitely reflected in the participation of individuals during the brainstorming sessions. No ideas were quashed, and individuals were encouraged to unleash any possible barriers to their highest dreams.

However, not all of the ideas generated at the sessions were received with great enthusiasm. Some participants eagerly accepted the concept of the 90/90 teams, but many teams and team leaders felt it was just add-

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ing another task to an already overloaded work schedule. The current practice has modified the 90/90 to make it a quarterly review. It also was determined that every team should conduct this review with each team member. This process provides an opportunity for individuals to know how they are doing and to identify areas that need improvement or more specific focus. Moreover, the 90/90, or quarterly review, should eliminate any surprises during an annual evaluation/review.

The other consultant at the second retreat introduced the library team to the Birkman Method. This questionnaire-based motivational assessment tool generates a report that provides employees with positive insights into their most productive behavior as well as their sources of motivation. The Birkman Method is used within organizations for hiring and selection, environmental team-building, sales training, career pathing, midcareer guidance, mentor relationship-building, identification of leadership skills and styles, and training needs assessment.

At this organizational week, the consultant worked only with the senior managers. Each senior manager first received an intense two-hour consultation, and then one full day was spent with the managers as a group. The individuals shared their reports with one another and discussed how their individual strengths contributed to the group’s efforts. This process also served the purpose of trust-building because it is very revealing and individuals must feel secure sharing their personal profiles.

In later organizational weeks, the method was presented to the team leaders and eventually the rest of the organization was “Birkmanized.” Currently, as new employees begin with the library, they are offered the opportunity to complete the Birkman Method questionnaire.

As a result of the method’s usefulness, two library members were sent for certifica-

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tion training at Birkman International, Inc., in Houston, Texas. They now are certified consultants in the interpretation of the Birkman Report and have worked with both individuals and specific teams for team-building, communication-building, and conflict resolution. The original Birkman consultant continues to work with the organization, as needed, in furthering the development and enhancement of the team process.

As the library has evolved in the "retreat" process, more of the strategic planning takes place during the organizational weeks. However, a portion of the week is still devoted to staff development. If it is determined that overall training is needed by the entire staff, a consultant is invited to present, depending on the needs of the organization.

One important concept in the organizational week is celebration. Celebrating the library's accomplishments is key to the start of such an engaging activity. When it was determined that an entire week was too much strain on individuals, it was shortened to three days. The three-day activity seems to accomplish what needs to be done. The "weeklet" starts with a continental breakfast and brief time for diversion. It also ends with food at an all-staff luncheon. Food seems to be an essential component of retreats regardless of their length.³ Staff seem more amenable to participating in the week's activities knowing they are going to be rewarded with "free" food.

Although the library is used as the location for the "weeklets," much of the literature encourages outside settings to provide for a complete, relaxed change from the usual workday surroundings.⁴ Due to the nature of the library business, it is almost impossible to

shut down daily operations for a three-day period, so the "weeklet" is conducted on the library premises. The time selected is between semesters so that traffic is minimal and more individuals can participate in the activities. A skeletal staff operates service points under a rotation schedule to ensure full participation.

Planning for the next organizational week begins as soon as the last one is completed. Surveys are distributed to all staff members asking for suggestions for future weeks and training needs. Dates are secured as far as a year in advance. Individuals are asked not to schedule vacation days during these periods, indicating the importance of the week. Consultants are identified and contacted to determine their availability.

Each weeklet, the entire staff is sorted into various random groups for activities and exercises of the event. Such arrangements take great effort to ensure that all ranks and levels of staff are included in each grouping. This technique has proved useful and provides an opportunity for staff to work with individuals from other teams. Facilitators are selected by the groups and, again, cross all levels and ranks within the organization.

Assessment and the future

How does one determine the success of organizational week activities? That probably would depend on the goal for any particular week's event. Have IUPUI's University Libraries' organizational weeks all been successful? For the most part, the answer is yes. Each week has triggered a response to a need of the library and some resolution has occurred. However, some of the library's organizational weeks have been more successful than others.

Does the entire staff buy in to the importance of the weeks? Probably not. Some staff still see the week as a disruption of their normal job activities but participate nonetheless because it is expected of them. Others look forward to this engaging process and value the opportunity to participate. There are some trade-offs. Daily operations slow down during the week. However, the possibility of a more motivated staff following the week makes this short slowdown worthwhile.

Is the IUPUI's University Libraries' organizational week a role model? Perhaps. In researching various models and concepts of
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newsletter and displays. The Bowdoin College description came a little closer and addressed more of the tasks involved: *Design and write exhibition material and place exhibits in cases and other display areas*.

We believe a more robust, cut-and-paste position description is likely to receive administrative support and might read something like this:

Title: Exhibits Curator

Description of Duties and Responsibilities:

Create and maintain appropriate exhibits in library display cases. Schedule and plan all library exhibits or touring exhibits. Change displays or exhibits in a timely manner. Prepare supporting materials, i.e., signs, press releases, and Web pages for exhibits or displays.

With the job more carefully defined, a good set of resources at hand, and another person to share and trade ideas, we think the role of display case person has the potential to move out of the “dreaded task” category. And if

you’re alone and out there struggling with displays at your library, why not contact one of us as a start? We look forward to hearing from you because we know from experience that we’ve gotten some of our best ideas from other display coordinators or exhibit curators.

Notes

1. Jane Kemp and Laura Witschi, *Displays and Exhibits in College Libraries*, ACRL Clip Note #25 (Chicago, ACRL, 1997).
2. *Ibid.*, 23.
3. See <http://www.lib.uwaterloo.ca/tour/boar/BoarContents.html>.
4. Visit <http://www.lib.mankato.msus.edu/lib/govdoc/proj/tutorials/finalfront2.htm>.
5. Two examples of library display Web sites are http://www.salisbury.edu/library/Displays/display_cases.htm from the Blackwell Library at Salisbury State University and <http://www.library.ucla.edu/libraries/url/urlxhibits/calendar.htm> from the Charles E. Young Research Library at UCLA.
6. Visit <http://www.ala.org>.
7. Kemp and Witschi, *Displays and Exhibits in College Libraries*. ■

(“Taking time . . . continued from page 902) organizational retreats, the library currently seems to be unique in its willingness to devote a substantial amount of time to the organization and development of its staff. It is not a perfect model, but it seems to be working and, for now, will continue to be followed.

The organizational week began as a response to the change in organizational structure. The organizational weeks are continued as tweaks are made in that structure for improvement and future development. The library environment will be constantly changing, and this tool is effective in meeting the demands of the changing environment. As in any journey, there will be bumps, curves, and detours; but the road will still take us to new adventures and exciting challenges as we move forward in the 21st century.

Notes

1. Randall R. Richards, “Crafting a dynamic board retreat: How to set the stage for strategic thinking,” *Association Management* 50 (Jan. 1998): 93.

2. Geoffrey James, *Business Wisdom of the Electronic Elite* (New York: Times Business, 1996), 57.

3. Janice Kirkland and Linda S. Dobb, “The retreat as a response to change,” *Library Trends* 37 (spring 1989): 496.

4. Norbert Lewandowski, “Retreat to compete,” *Ohio CPA Journal* 56 (July–September 1997): 44.

Additional resources

Cuff, E. Dale, and Gisela Webb, “Staff retreats in ACRL libraries,” *College & Research Libraries News* 49 (Sept. 1988): 517–21.

Dobb, Linda S., “Four retreats and a forum: A meditation on retreats as a response to change,” *Library Trends* 47 (spring 1999): 699–713.

Nanus, Bert, “Leading the vision team,” *Futurist* 30 (May/June 1996): 20–24.

Stern-Dunyak, Alison, and Jane Sanders, “Moving forward with a retreat,” *Association Management* 52 (Dec. 2000): 49–51. ■