LIBRARY LEADERSHIP & MANAGEMENT

Leading Change in Action: Reorganizing an Academic Library Department Using Kotter's Eight Stage Change Model

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Abstract

This article presents a management case study of a project to reorganize the Resource Sharing and Access Services department in the main library at the University of Maryland in 2015. The case study uses John Kotter's eight-stage change process, articulated in his 1996 book, *Leading Change,* as the framework for successfully managing a complex change of this type. The article explains the ways in which Kotter's model was adapted for the reorganization process, as well as the limitations of the model for the academic library environment in general and the department reorganization in particular. It concludes by presenting suggestions for further research in change management in library settings.

Introduction

In 2015, the department of Resource Sharing & Access Services at the University of Maryland Libraries undertook a major reorganization with the aim of increasing efficiency, staff engagement, and user satisfaction. Using John Kotter's work on change leadership as its foundation, the process took a full year of work. It resulted in a new organizational chart and new job descriptions for the majority of the department's thirty-two staff, as well as new workflows for some of the department's most important processes. By describing the theory underlying and the processes, results, and lessons learned from the reorganization, this article will provide a model of successful leadership and project management for library administrators.

Literature Review

Kotter's Change Model

John Kotter's book, *Leading Change,* was published in 1996,[1] and expanded upon an earlier *Harvard Business Review* article of the same title.[2] *Leading Change* condenses the results of Kotter's observations of change efforts at over one hundred companies, and offers a blueprint for why some changes succeed while others flounder. Kotter presents his findings via the Eight Stage Process of Creating Major Change:

1. Establish a sense of urgency
2. Create the guiding coalition
3. Develop a vision and strategy
4. Communicate the change vision
5. Empower employees for broad-based action
6. Generate short-term wins
7. Consolidate gains and produce more change

8. Anchor new approaches in the culture

Rune Todnem By notes that the book follows the emergent approach (as opposed to the planned approach) to change management, and differs from similar works by providing "practical guidance to organisations and managers" on how to lead successful change.[3] Applebaum, et al remark that "Kotter's model of change management…became an instantaneous success at the time it was advocated and… remains a key reference in the field of change management."[4] Applebaum's review of the change management literature suggests that all eight of Kotter's stages were still highly significant in 2011, and had not been directly contradicted or supplanted by other studies in the intervening sixteen years. Kotter followed *Leading Change* with a series of books expanding and reinforcing his findings. [5] In *Accelerate*, for example, he replaces stages Seven and Eight with "Sustain acceleration" and "Institute change," respectively, and emphasizes strategies for increasing the speed of change. These subsequent books have expanded Kotter's brand and have their followers; Horn, for example, uses the condensed four-stage version of Kotter's model to discuss an organizational change at Deakin University (Geelong, Australia) Library.[6]

Uses of Kotter's Change Model in Libraries

Farkas proposes using Kotter's model to create and embed a culture of assessment in libraries,[7] but Carter offers perhaps the only case study of an academic library using the entirety[8] of Kotter's eight-stage model to guide a change, specifically efforts at Auburn University Libraries to integrate information literacy assessment into its library instruction program.[9] Carter found that stages often happened simultaneously, and thus discusses them in the context of three broader phases – planning (2009-2010), implementation (2010-2013), and current status and future plans (2013). Carter concludes that the model provided a useful framework for structuring and enacting change in a relatively small department of seventeen librarians, but that securing broader cultural changes across the organization may prove more difficult in the long term. Nussbaumer and Merkley discuss an organizational change at the University of Lethbridge (Alberta, Canada) Library. The change, driven by a new University Librarian, began with eight strategies for systemic change, intended to "enable the library staff to *move forward*, operationally, organizationally, and culturally." These strategies started with "creating a framework for change," and "leveraging outside expertise," and ended with "forming operational teams and work groups" and "reflections." The authors list Kotter's eight stages, noting that many of them were embedded in the eight strategies they used for the change – Strategy One, "creating a framework for change," for example, is mapped to Kotter's "establishing a sense of urgency" – but overall the authors focus on their own process rather than Kotter's theoretical approach.[10] Sidorko uses Kotter's model to evaluate an organizational change at the University of Newcastle (Australia) after the fact, reviewing the ways in which the administration did or did not follow each of the eight stages. Sidorko finds that Newcastle followed most of the eight steps implicitly rather than explicitly, and that, while the stages "served the organization well in the change process," the model falls short when it comes to "methodologies for evaluating or measuring the success of the change."[11] Outside of the library literature, there are also examples of organizations explicitly following Kotter's model to implement or guide a change; Pollack and Pollack, for example, employed the eight stages for a change in the Australian Finance and Insurance Sector. They found that the model was generally effective, but required some modification in the form of multiple guiding coalitions and running multiple stages of the process concurrently, due to the size of the organization (10,000 employees) and complexity of the change.[12]

Reorganization in Libraries and Access Service Departments

There is a wealth of literature on reorganizations of libraries large and small, public and academic, and of the numerous departments therein. One of the earliest is Hewitt on the reorganization of technical services at the University of Colorado.[13] Butcher and Kinch discuss the political (i.e., "turf") issues that surfaced during a reorganization of reference services at Oregon State University.[14] Others recount whole-library reorganization projects using a variety of methods, including Teams,[15] Total Quality Management,[16] and Core Competencies.[17] Higga, Bunnett, Maina, et al lay out the process to reorganize a staff of fifty-five at the University of Texas Southwestern Medical Center at Dallas Library, for which they cite Kotter as a major influence.[18] And, while they do not name Kotter specifically, Maness and Culshaw describe a reorganization process that seems to draw on some of his stages, particularly the importance of the guiding coalition.[19]

There is a significantly smaller body of literature focused on reorganization efforts in Access Services[20] departments. Warren details the process by which Yale University Library reorganized its Access Services unit, resulting in four discrete work groups: administration and IT; frontline services; resource sharing and reserves; and operations.[21] Austin reports on restructuring and integrating circulation and interlibrary loan at the University of Colorado, Boulder. The project resulted in the creation of a centralized "Materials Management Center" to handle most "back-of-the-house" processing tasks, an innovation that proved especially informative for the present case study.[22] Fritts,[23] Cheung, et al,[24] and Alarid and Sullivan[25] discuss various mergers and cooperative arrangements between circulation, interlibrary loan, and reserves as examples of the ways in which tasks and workflows can be rearranged within and between academic library units. Tribble writes of merging interlibrary loan and circulation at the Indiana State University Libraries and attempts to delineate some general principles of when and how to merge library units.[26] To date there seems to have been no case study of the systematic application of Kotter's Eight Stage Change Process to a reorganization project in an academic Access Services department.

Background & Institutional Context

The University of Maryland is a major public research university in College Park, less than ten miles north of Washington, DC. It is the flagship institution of the University System of Maryland and offers ninety-one undergraduate majors and over 200 graduate degrees through programs in twelve colleges and schools. The university has a total enrollment of 37,248 (26,538 undergraduate and 10,710 graduate), a tenured or tenure-track faculty of 1,511, among 4,467 total faculty, and a staff of 5,494.

McKeldin Library is the main library on campus, with collections in the arts, humanities, business, social sciences, life sciences, and government documents totaling 1.2 million volumes. It is a busy center of academic and social life on campus, with approximately 1.8 million visits per year. Prior to June 2014, the department of Resource Sharing and Access Services was divided into five units: Circulation and Reserves, Interlibrary Loan, Stacks Maintenance, Billing and Fines, and Late Night. These units handled most of their assigned duties from an office area behind the Circulation Desk on the first floor, while a separate department, Information Services, provided reference services, support for public computers and printers, and maintenance of the reference collection from a separate Information Desk (also on the first floor). Following a merged desk pilot project, the Information Desk was removed in the summer of 2014 and all services were offered from a combined Library Services

Desk. After a trial period, the two units merged in the fall of 2014 under the direction of the Head of Resource Sharing and Access Services.

Also in the fall of 2014, due to a librarian departure in another unit, the Terrapin Learning Commons (TLC), became part of the Resource Sharing and Access Services department. The TLC unit staffs a separate service desk, the TLC Tech Desk, where it oversees the popular equipment loan program and specialized printing services (poster printing, laminating, binding, etc.) The TLC is located on the second floor of McKeldin Library and also includes a suite of group study rooms and the John and Stella Graves Makerspace. After incorporation of the Information Services and Terrapin Learning Commons units, the new, combined department had a staff of 31.5 FTE (one librarian, seven exempt staff, twenty-three non-exempt staff, and one half-time graduate assistant), and approximately 120 student workers, with a student labor budget of over $438,000. Appendix 4 shows the department's organizational chart as of October 2014.

Goals of Reorganization

The Head of Resource Sharing and Access Services identified full integration of staff and services from the Information Services and Terrapin Learning Commons units into the department as a major goal. In addition, while the department had grown and changed significantly in recent years through the hiring of new staff in Circulation and Reserves, Interlibrary Loan, and Late Night, and the introduction of new or improved services such as department delivery, self-service holds, equipment loan, and many more, the overall structure of the department had not changed in nearly a decade. The last major organizational change was in 2006, when the previous department head merged circulation and reserves and hired a coordinator for the combined unit. Thus the department head and unit coordinators identified numerous inefficiencies and issues across the department, including:

- Duplication of effort and competition for resources (mostly scanning equipment) between reserves and interlibrary loan units
- Duplication of effort and competition for resources (mostly space in a cramped packing area) between circulation and interlibrary loan. These two units both had packing and shipping responsibilities that needed the same space and were not well coordinated.
- The Terrapin Learning Commons unit was chronically under-staffed, such that longer-term planning and projects were being neglected in favor of day to day service activities.
- Stacks staff had the best knowledge of physical collections, but were not involved in retrieval of materials for patron-placed holds, interlibrary loan, or course reserves. There was a lack of clear workflows for reporting and searching materials not found during routine retrieval activities.
- Uneven demand for course reserves meant that Reserves staff were overworked for short bursts (about one month at the beginning of each semester) and underutilized at other times. The combination of Circulation and Reserves in one unit led to Reserves often being treated as an afterthought, with no serious planning for service enhancements.
- Late Night staff did not have well-defined responsibilities during winter and summer terms, when they work daytime shifts.

- Former Information Services staff did not have as many “back of the house” processing duties, and were subsequently carrying a heavy burden of the Library Services Desk shifts.
- Billing and Fines was a one-person unit, with no backup or succession plan.

Stage One: Establish a Sense of Urgency

Identifying these challenges and sharing them with department coordinators served to fulfill the first step in Kotter’s change model: “Establish a sense of urgency.” According to Kotter, “Establishing a sense of urgency is crucial to gaining needed cooperation. With complacency high, transformations usually go nowhere because few people are even interested in working on the change problem. With urgency low, it’s difficult to put together a group with enough power and credibility to guide the effort or to convince key individuals to spend the time necessary to create and communicate a change vision.”[27] In this case it would be inaccurate to describe the department’s coordinators as “complacent” – all had shown themselves willing and able to continually examine their work and look for ways to improve it – but it was still necessary to lay out the exact reasons for undertaking a large reorganization project before asking staff to commit themselves to the significant work and upheaval such a project would create.
Kotter also advises using (or creating) a crisis to illustrate the urgent need for change, but in this case the department head determined that no crisis was necessary to provide extra motivation; the challenges above, in light of the recent changes to the department composition and overall rapid pace of change in a large academic library, were sufficient motivators for the reorganization work.

Stage Two: Create a Guiding Coalition

Kotter’s second stage is to “Create the guiding coalition,” a group with the right mix of position power, expertise, credibility, and leadership to effectively move needed changes forward. Such a committee operates with a high level of trust and works toward a shared goal.[28] For this project, the guiding coalition was made up of the department head, Access Services Librarian (who also led the Interlibrary Loan unit) and unit coordinators for Circulation and Reserves, Stacks Maintenance, Billing and Fines, Late Night, and Information Services. This group of leaders, each with expertise in key operational areas, worked together to create and communicate the change vision and strategy. Since all department staff reported to one of these coordinators, they could also effectively gather feedback from and give assignments to front-line staff to keep the change process moving forward. As Kotter points out, it is impossible for “the isolated CEO” to keep pace with the scale and complexity of issues and pace of change in the modern organization; therefore, the guiding coalition is an essential component of any successful change project.

Stage Three: Develop a Vision and Strategy

The third stage of Kotter’s change model is to “Develop a Vision and Strategy” for the desired change. According to Kotter, the vision accomplishes three things: it “clarif[ies] the general direction for change;” “motivates people to take action in the right direction, even if the initial steps are personally painful;” and “helps coordinate the actions of different people… in a remarkably fast and efficient way.”[29] The guiding coalition developed a change vision in the form of five goals, which the reorganization would endeavor to solve:

1. Integrate staff and services from the Terrapin Learning Commons and Information Services units and make sure work is being shared equitably and efficiently.
2. Ensure consistent staffing across two service desks.
3. Identify redundancies in our work and maximize efficiency of operations.
4. Assess staffing needs and opportunities and make the most of existing staff resources.
5. Allow and encourage staff to learn new or build on existing skills.

The guiding coalition also developed a strategy for implementing the change vision which would involve staff across the entire department.

The Reorganization Process

Stage Four: Communicate the Change Vision

Members of the guiding coalition initially introduced staff to the change vision and strategy at a department meeting in November 2014. The department head led a discussion of the goals of the reorganization, emphasizing the advantages to users and to staff, and presented the process and timeline, which started with two assignments: first, staff were to review their own job descriptions and annotate them with duties that were outdated, irrelevant, or missing altogether. The annotated job descriptions were due to unit coordinators by the end of November. Second, all staff, including the unit coordinators and department head, were asked to keep detailed logs of their work for a period of two weeks. The logs were broken down into thirty-minute increments, and staff were asked to note the duration, task category, task description, and priority of the work they did during each period. The task categories were numbered and standardized to enable easy recording and analysis across the department. The categories were as follows:

1. Desk (including regular shifts or unscheduled time at Library Services Desk or TLC Tech Desk)
2. Processing (e.g., receiving periodicals, processing interlibrary loan requests in ILLiad, canceling fines, cataloging equipment for loan)
3. Projects (e.g., collection shifting, reference collection withdrawals, updating webpages for an upcoming service change, updating hours on the website)
4. Other Access Services work (e.g., communicating with users by phone or email, compiling statistics from the integrated library system, counting patrons during Late Night hours)
5. Managing/training students (e.g., approving student timesheets, reviewing applications, interviewing student applicants, directing student work)
6. Room or equipment maintenance (e.g., setting up meeting rooms for reservations, unjamming printers, helping a user with a microfilm scanner)
7. On a break
8. Non-Access Services work (e.g., meetings not related to primary responsibilities, non-work tasks such as personal email, surfing the web, or chatting with co-workers)

Staff were asked to provide details, as appropriate, in the Task/Activity Description field to help clarify what they were doing during each time slot. A sample time log entry is shown in Figure 1, below. One obvious drawback to this approach is that data is self-reported, which likely led to low reporting of category eight ("Non-Access Services work," also known as "wasted time,") despite assurances from supervisors that the logs would only be used for collective data gathering, not individual evaluation. The department head communicated to staff that the results of the time logs would be used to create a new structure and organizational chart for the department.

Figure 1: Time log template

Time Period	Task Category	Task/Activity Description	Priority	Notes
10:00 – 10:30am	1, 2	20 minutes helping at Library Services Desk; 10 minutes processing and shelving new books	_ Low _ Medium x High _ None _ Don't know	Desk = high priority due to high traffic; New books = medium priority

As Kotter's model recommends repetition of the change vision and using different forums for communication, the department head and unit coordinators followed up the department meeting with email messages outlining the goals of the reorganization, instructions for completing the time logs, and next steps in the process, and used unit and one-on-one meetings to make sure all staff understood the reorganization project.

Unit coordinators analyzed their employees' annotated job descriptions and time logs in order to generate comprehensive lists of what their groups did and how long each task took. They also used this input to identify common language for job descriptions. For example, although the proportion of time varies based on the position, everyone in the department spends some time at one of the two service desks, so the coordinators wrote a basic description of those duties to be used across the entire department. This common language brought consistency to job descriptions across the department that had been written at different times and by different supervisors.

The process of analyzing the time log data and generating comprehensive task lists proved to be more time-consuming than expected; the original timeline had this step completed by January 2015, but it actually took until March 2015 to generate usable data for the next phase of the reorganization.

Stage Six: Generate Short-Term Wins

Kotter places a strong emphasis on his stages occurring in sequential order, finding that failing to do so "rarely works well. It doesn't build and develop in a natural way. It comes across as contrived, forced, or mechanistic. It doesn't create the momentum needed to overcome enormously powerful sources of inertia."[30] However, he also notes that stages may often overlap, which is the case with stages five and six in the current case study. In order to keep the timeline as clear as possible, stages five and six will be presented out of order here.

To keep the process momentum going during the data analysis phase and generate "short-term wins," members of the guiding coalition organized a staff retreat in January 2015. The stated goals were to: involve all department staff in discussion of the expanding work of Resource Sharing and Access Services, including strengths and challenges; generate ideas for how work could be organized more effectively, specifically as it relates to our challenges; provide time and activities to encourage team-building; and generate ideas for renaming the department to reflect its changing work. In preparation for the retreat, staff were asked to answer three questions: what do you like about your job; what do you dislike about your job; and what would you like to learn more about/do more of in your job? The last question in particular was intended to get staff thinking about strengths that they might not get to use regularly, or that they would like to develop, and help them to think about other places in the department that might be a good fit for their talents and interests.

The retreat organizers used the "World Café Method"[31] to structure group discussions. Participants rotated among five tables to answer questions about the department's strengths, challenges, expected changes in the next three to five years, and skills necessary to maintain and develop services. At the last table, staff brainstormed potential names for the department, which were collated and put to a vote following the retreat. The resulting name change, from Resource Sharing and Access Services to User Services and Resource Sharing (with the user-centric acronym, USRS) was an easy, if symbolic, "short-term win" which served to keep staff excited about and engaged with the reorganization process while establishing a new identity as a department.

For the second half of the retreat, organizers used the list of challenges generated during the World Café exercise – duplication of effort and competition for resources, consistency of service, communication, job knowledge and technology skills, and desk coverage across units and shifts – to shape further discussion. Staff broke into groups again to brainstorm solutions for the challenges using five different "frames," adapted in part from Bolman and Deal's work on organizational leadership.[32] The full retreat schedule, including World Café questions, challenges, and framing questions, is included as Appendix 1.

Creating the New Organizational Chart

During the data analysis and staff retreat phases, the department generated another "short-term win" by acquiring a new unit head, a librarian who was transferred from another Public Services department to serve as head of the Terrapin Learning Commons. This position brought leadership for the TLC unit and cemented its place of importance within the department structure, reassuring staff and management that any reorganization work to incorporate the TLC staff would not be wasted. The new Head of Learning Commons became a part of the guiding coalition.

The next major task was to use the results of the time logging and staff retreat to redesign the organizational chart and redistribute work. At a department meeting in April 2015, members of the guiding coalition led all staff in an Open Card Sort activity.[33] Staff broke into four groups, each with a set of 110 cards representing the tasks identified via the time logs, and were instructed to sort them into five to nine groups of tasks that require similar processes, knowledge, skills, spaces, equipment, software, and the like. Administrative tasks, such as employee evaluations, timesheet approvals, and unit meetings, and desk-only tasks such as book and equipment circulation were excluded from this activity. Staff were asked not to worry about naming or labeling the groups, nor to think about which employee or employees would do a particular task. The purpose of the Open Card Sort, where the groups are not identified in advance, is to allow the staff to consider tasks individually – not as part of a particular person or group's job – and to put them together in a structure that makes functional sense. The guiding coalition asked staff to consider the question, "How would you go about designing a department from scratch to accomplish these 110 tasks?"

The four tables of staff each generated between six and ten task groupings, then assigned basic descriptions to them such as Rooms, Periodicals, User Accounts, Public Technology Maintenance, Periodicals, Public Spaces, Opening/Closing Procedures, ILS Maintenance, etc. The 110 tasks were input into a spreadsheet, labeled with the four tables' grouping names, and manipulated using pivot tables. Figure 2 shows three of the 110 tasks and how they were categorized by each of the four table groups.

Figure 2: Task groupings by category

Task ID	Task Description	Group	Category
A68	Add, change, and remove periodical titles	Table 1	Periodicals
B68	Add, change, and remove periodical titles	Table 2	Periodicals
C68	Add, change, and remove periodical titles	Table 3	ILS
D68	Add, change, and remove periodical titles	Table 4	Periodicals
A105	Archive notices for recalls, holds, overdue, billed for replacement; delete files after 3 years	Table 1	Processing
B105	Archive notices for recalls, holds, overdue, billed for replacement; delete files after 3 years	Table 2	Billing
C105	Archive notices for recalls, holds, overdue, billed for replacement; delete files after 3 years	Table 3	Accounts
D105	Archive notices for recalls, holds, overdue, billed for replacement; delete files after 3 years	Table 4	Accounts
A59	Arrange Special Events Room furniture	Table 1	Rooms
B59	Arrange Special Events Room furniture	Table 2	Questions
C59	Arrange Special Events Room furniture	Table 3	Rooms
D59	Arrange Special Events Room furniture	Table 4	Spaces

The department head, with assistance from a Microsoft Excel-savvy member of the guiding coalition, used the tables to analyze the tasks. That analysis, in turn, was used to create unit descriptions and a new organizational chart, and assign tasks and numbers of staff (but not individual staff) to each unit. The guiding coalition provided valuable feedback as the organizational chart took shape, pointing out inconsistencies in the task groupings, workflows that might prove logistically difficult, and similar concerns. By June 2015 the guiding coalition had a near-final version of the organizational chart, unit names and descriptions, and generic descriptions of staffing needs (minus individual staff names) ready to share. The department head attended individual unit meetings to solicit feedback and answer questions about the new organizational chart and the steps for implementation.

Major features of the new model included:

- Adequate coverage and backup for tasks required a move to more shared positions, wherein staff split their time across two units. This allows for a greater depth of knowledge across the department without acquiring additional staff. For shared positions, one unit coordinator serves as the primary supervisor for timesheets and performance reviews, with input from the secondary supervisor. The two supervisors coordinate to determine how their shared staff's work and schedule is divided.
- The need for a new model for staffing the Library Services Desk became apparent. Under the new organization, staff from the Library Services Desk unit cover the desk weekdays in the early mornings (8:00-10:00am) and evenings (6:00-11:00pm) plus weekends. Other units are responsible for proportional coverage of desk hours between 10:00am and 6:00pm weekdays. The new model makes individual units responsible for distributing hours equitably among their members, and for providing backup when needed. The Library Services Desk Coordinator is the functional supervisor for all staff during their desk shifts, and has input on performance reviews regarding customer service and job knowledge at the desk. The system has led to greater consistency and fairness in how desk hours are allocated.
- Course Reserves and Interlibrary Loan tasks were combined in the Resource Sharing and Reserves unit, which gained three full time staff from the previous Circulation/Reserves unit. To accommodate the additional tasks associated with Reserves, this unit relinquished its duties related to retrieving materials from the library stacks and shipping and receiving materials to and from other libraries.
- The Collection Maintenance and Retrieval (formerly Stacks Maintenance) unit took on tasks related to retrieving materials for patron-placed holds, course reserves, and interlibrary loan from the library's collections. This change allows the staff with the strongest knowledge of the print collections to use their expertise in direct service to users who request materials. Collection Maintenance and Retrieval also took over maintenance of the ever-shrinking reference collection, which had moved from the first to the fourth floor during the course of the reorganization project.
- A Logistics and Periodicals unit was created to take on tasks related to packing and shipping materials for interlibrary loan and consortial borrowing. This unit also maintains the shrinking current periodicals and microfilm collections, legacies of the former Information Services unit. The smallest unit with only a coordinator and two primary staff, Logistics and Periodicals relies on two shared positions with the Library Services Desk and Collection Maintenance and Retrieval units to accomplish its time-sensitive work.
- Student hiring, training, and scheduling is shared across the Library Services Desk, Collection Maintenance and Retrieval, and Logistics and Periodicals units as much as possible, with oversight from a student supervisor in the Library Services Desk unit. Resource Sharing and Reserves, Late Night and Terrapin Learning Commons will continue to hire, train, and schedule their own students for the immediate future due to the specialized nature of these units' work and schedules.

- The Late Night and Terrapin Learning Commons units remained largely unchanged, with two exceptions. First, Late Night staff became formal members of the Resource Sharing and Reserves unit during January and June-August, when they work daytime hours and when interlibrary loan and reserves workloads are at their heaviest. Second, responsibility for billing related to equipment loan was transferred from the Terrapin Learning Commons to the Billing, Community Borrowers, and User Accounts unit. This freed up a significant amount of time for Terrapin Learning Commons staff, such that additional staff moves were not necessary.

Descriptions of the units and staff assigned to each are included as Appendix 2, the updated organizational chart is included as Appendix 5, and a timeline showing the entire reorganization process is included as Appendix 6.

Stage Five: Empower Staff for Broad-Based Action

With the new organizational chart created and unit descriptions in place, the next step was to empower everyone in the department to create the change. Staff involvement had been high through the first six months of the project via the time log assignment, department retreat, card sorting exercise, feedback on draft versions of the organizational chart, and frequent email and in-person progress reports. The next phase was meant to address one of Kotter's biggest obstacles to effective change: removing systemic and structural barriers. According to Kotter, "unaligned structures block needed action."[34] For example, if the new system required Collection Maintenance staff to be involved in materials retrieval, but they were prevented from doing so in a timely manner by a hold router schedule aligned to the old system or a lack of appropriate equipment, the change would fail before it had a chance to begin. By asking staff to participate in identifying workflows and structures that might stand in the way of implementing the new organization, it helped them to understand and build their enthusiasm for the change, increasing their buy-in in the process and results.

To accomplish Stage Five, the guiding coalition formed four Task Groups. These Task Groups – Student Supervision, Searching and Retrieval, Packing and Shipping, and Library Services Desk Scheduling – had broad membership from across the department and were responsible for developing workflows and systems in their areas of responsibility to support the new organization. The guiding coalition created a charge with key questions, members, deliverables, and deadlines for each group. The groups had between four and eight weeks to complete their work; some groups produced a final report, while others just prepared a list of recommendations or a specific deliverable (for example, a completed desk schedule). The charges for the four working groups are included as Appendix 3.

Aligning systems and structures to the vision also required updating job descriptions so supervisors could fairly and effectively evaluate staff according to their new duties. Throughout July 2015, the department head updated all unit coordinator job descriptions to reflect their new units' profiles and to include standardized language on tasks like staff supervision, shared leadership of the department, and gathering and analyzing statistics. Following approval of the new job descriptions by the Libraries' Human Resources office, the coordinators were assigned to edit all job descriptions for their direct reports, and to work together on job descriptions for shared positions. The department head held individual meetings with all staff (eleven in all) whose job responsibilities would be changing by fifty percent or more or who would be changing supervisors. Coordinators shared the completed job descriptions with their staff at mid-year performance review meetings in July and August 2015 and notified staff in writing of any schedule changes, as required by the University's Memorandum of Understanding with the employees' union. In the process it also became clear that at least four staff needed to have their positions reclassified to match higher performance expectations and increased task complexity under the new structure, so the department head began communicating with Libraries Human Resources to pursue those changes, which were subsequently approved. These new job descriptions and position reclassifications allowed the staff to see the changes reflected in their daily responsibilities, and allowed the department to move forward with the broader changes.

Kotter also stresses the importance of providing necessary training during this stage, which the guiding coalition addressed by developing a department-wide training program. The department head and coordinators asked staff to identify the areas where they felt they needed training, then identified experts within and outside of the department to present sessions on a variety of topics – catalog searching, referring questions to subject librarians, processing Community Borrower applications, course reserves FAQs, common printer problems, troubleshooting ebook access problems – and in a variety of formats, including formal classroom, one-on-one, and drop-in group sessions. These sessions were very popular with staff, and have been repeated in subsequent winter and summer terms.

Stage 7: Consolidate Gains and Produce More Change

With staff ready to begin working unofficially in their new positions and attending meetings of their new work groups, it was time to "consolidate gains and produce more change." Kotter warns, "Whenever you let up before the job is done, critical momentum can be lost and regression may follow."[35] He stresses that the guiding coalition needs to use the credibility they have gained throughout the change (by securing short-term wins, for example) to continue driving change forward. At an all-staff meeting on July 30, 2015, the department head unveiled the new organizational chart to the entire staff, and asked the Task Groups to present their findings and recommendations. Communication with individuals and small groups had been constant throughout the process, but this meeting was the first time the plan, in its entirety, was put in front of the entire staff for discussion. The staff identified additional changes – for example, renovating an under-utilized office into a dedicated processing area for packing and shipping operations – to enhance the efficiency of the new structure and workflows. Reaction to the new structure and Task Groups' work was positive overall, providing a smooth transition to Stage Eight.

Stage 8: Anchor New Approaches in the Culture

This is perhaps the "slipperiest" stage of Kotter's model, but the most important to the permanent success of the change process. No matter how much work goes into the change, it will not last unless the organization's culture, including group behavior norms and shared values, also changes to match. While certain behavioral and attitude changes may begin to happen early in the transformation process, the key step of "anchoring change in a culture" cannot happen until the end. According to Kotter, this anchoring requires "lots of talk" to convince staff of "the validity of new practices," tangible results to demonstrate the success of the new approach, and, occasionally, turnover of key employees.[36]

Throughout August and September 2015, the department head worked with the guiding coalition and the Libraries' Human Resources office to put the final touches on the reorganization, including announcements to all staff, changes to electronic timesheets, creation and population of email reflectors for the new work units, and more. The new organization became official on September 20, 2015. Kotter's prescribed "lots of talk" began (or, more accurately, continued) immediately, with a strong emphasis from the leadership that the change would be a "work in progress;" the initial changes would be just the first step in an ongoing process to improve efficiency, staff engagement, and the user experience.

Several dramatic results emerged, particularly in the Resource Sharing and Reserves unit, which helped demonstrate the success of the new approaches. The first were improved turnaround times for print and electronic course reserves and for interlibrary lending and document delivery, as shown in Figure 3 and Figure 4, below.[37] Average turnaround time for course reserves decreased by 4.5 days (for print) and nine days (for electronic) compared to the same period of the previous year. Average turnaround time for document delivery decreased by twelve hours compared to the same period of the previous year, lending fill rate improved from fifty-one percent to fifty-five percent, and lending turnaround time for all libraries improved by sixteen hours. Partner libraries received items an average of twelve hours faster than before the reorganization, thanks to better coordination of retrieval and shipping workflows.

Figure 3: Course Reserves Fulfillment Times

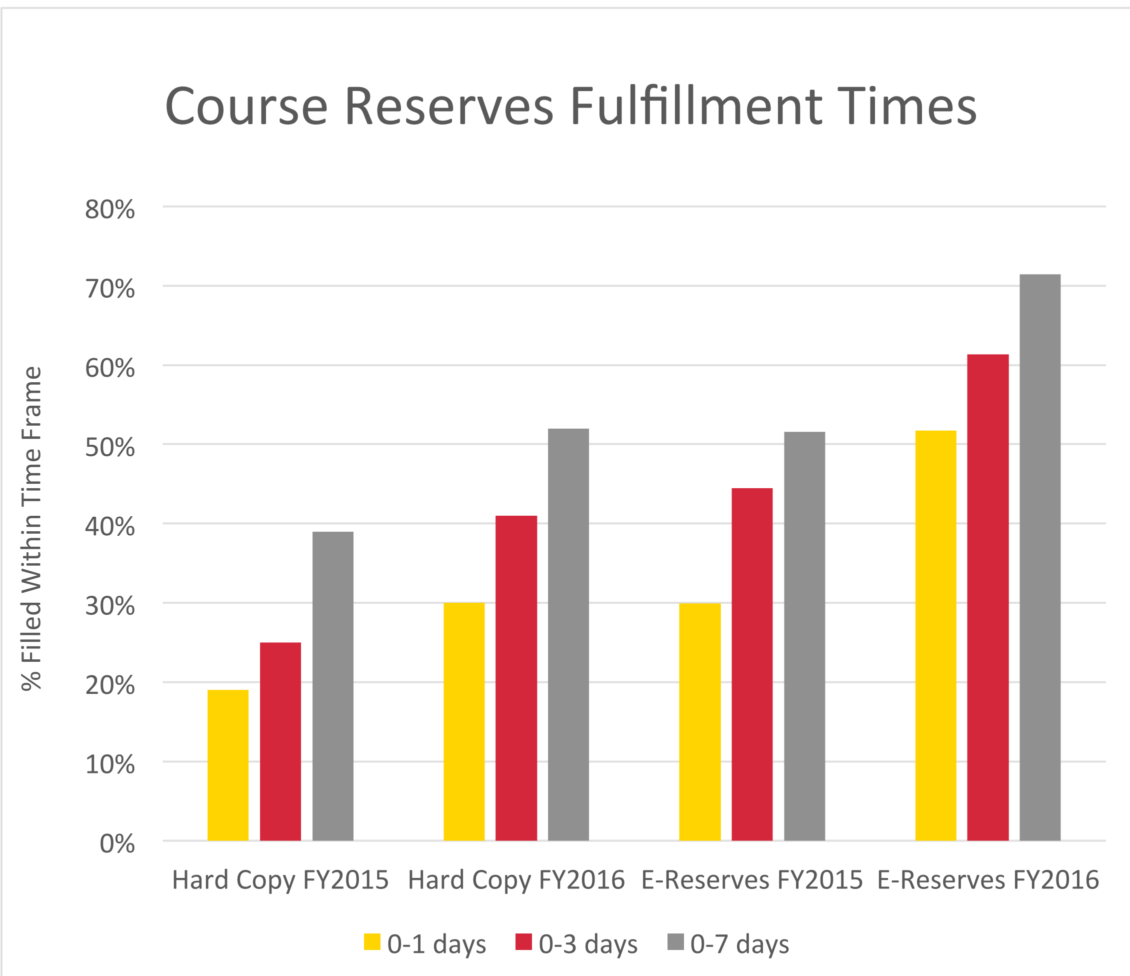
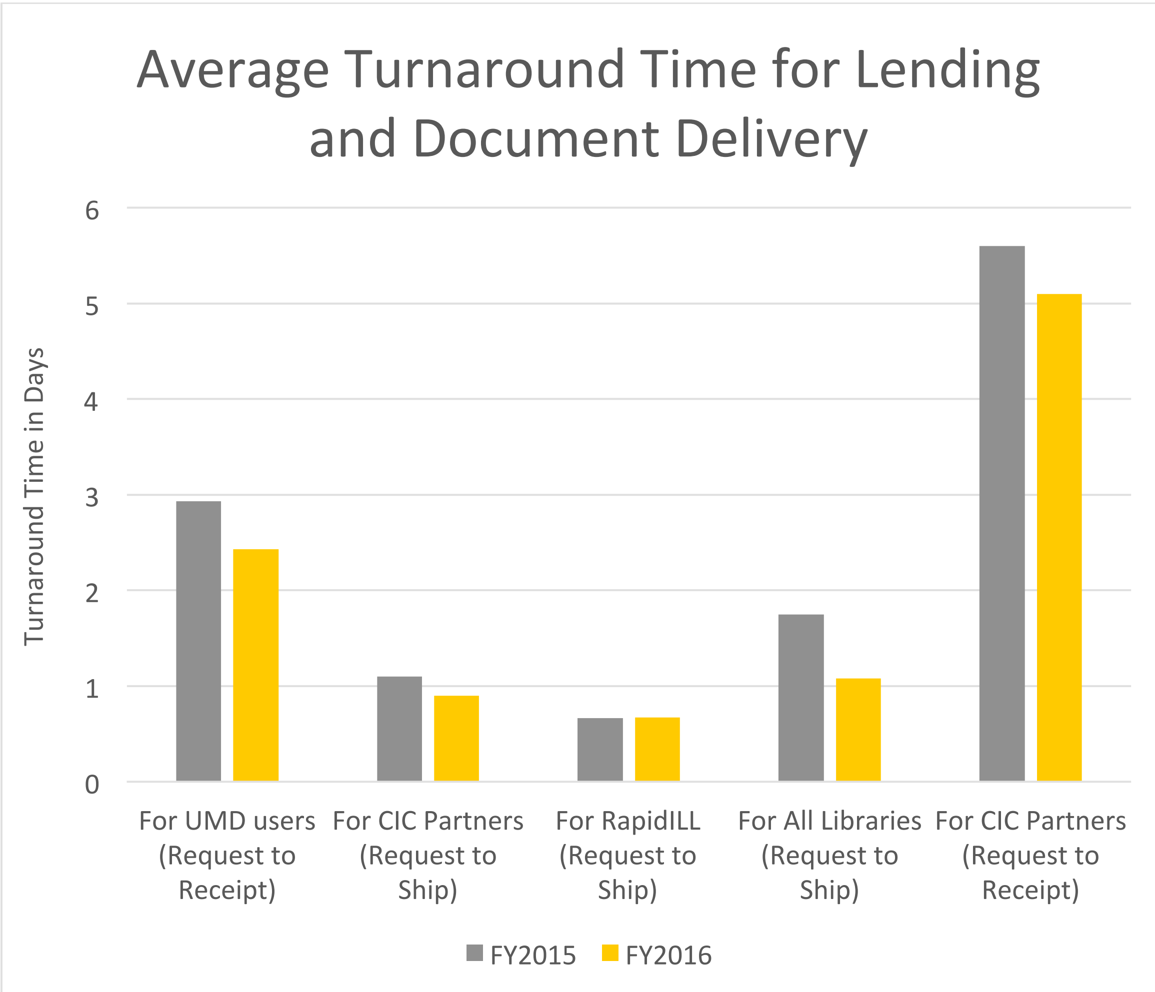


Figure 4: Average Turnaround Time for Lending and Document Delivery



Another tangible result was improved efficiency in the use of Labor and Assistance funds for student employees. Total funds requested for Fiscal Year 2017 decreased by 3.06% from Fiscal Year 2016, despite an increase in the minimum wage, and total hours requested decreased by 1.84%. More importantly, increased efficiency allowed the department to shift resources to units which had traditionally been short-staffed, such as the Terrapin Learning Commons and Late Night. By shifting retrieval activities from Interlibrary Loan to Collection Maintenance, and moving packing and shipping operations from Interlibrary Loan to Logistics and Periodicals, ILL was able to take on course reserves activities with a negligible increase in student hours. Changes in student budgeting are shown in Figure 5, below.

Figure 5: Improved efficiency in student budgets

Labor & Assistance Requests	FY2016	FY2017	% Change
Total Funds Requested	$524,462	$508,414	-3.06%
Total Hours Requested	49,932	49,012	-1.84%
- Learning Commons	9,984	10,780	+7.97%
- Stacks	7,050	6,240	-11.49%
- Late Night	6,336	6,840	+7.95%
- Interlibrary Loan	9,282	9,408	+1.36%
- Library Services Desk	17,280	15,744	-8.89%

Unexpected turnover of two key positions happened within the first few months of unveiling the new department structure, allowing the department head to promote from within two staff who had been essential to the reorganization efforts and thus reinforce the new approaches. New hires in the Library Services Desk, Resource Sharing and Reserves, and Terrapin Learning Commons units added employees who *only* knew the new structure, further cementing the change in the department's culture.

Conclusions & Lessons Learned

Overall, Kotter's Eight Stage Change Model provided a practical, workable structure for a reorganization of this type. Establishing the sense of urgency, creating the guiding coalition, and developing and communicating the vision and strategy came naturally from the department head's established approach to management, which also prepared employees for the expectation that they would be empowered to enact change and that their input would be valued. This approach may not work as well where trust is low or where relations between management and front-line staff have traditionally been more hierarchical. The short time span for the change (approximately ten months) allowed for relatively few short-term wins (a new department name, a new unit coordinator for the Terrapin Learning Commons) but constant communication from management and staff involvement in the process served to keep the change moving forward nonetheless. Although Kotter presents Stages Seven – Consolidate gains and produce more change – and Eight – Anchor new approaches in the culture – as discrete steps with clear beginnings and endings, that was not the experience of the author in this case. Rather, the final two stages will continue in cycles as the department continues to grow and evolve in the coming years, assessing its progress and making changes accordingly. The singular, linear emphasis of Kotter's model, with no clear guidance on outcomes assessment, has been noted as a shortcoming by others[38] and seems out of step with the iterative, cyclical nature of most business environments.

This process yielded a few other lessons which might be useful for leaders who want to reorganize their department or library:

- Involve the Human Resources office in the process as early as possible. They can provide guidance on potential pitfalls, such as limitations on changing job descriptions or employee schedules or reclassifying positions. There is no sense in creating a beautiful new organizational chart only to find that (for example) a certain category of employee is prohibited from reporting to another in the same category.

- Likewise, keep upper management informed at every step along the way, and consider stakeholders outside of the department. While the department manager may not be attached to a certain workflow or structure, there may be others in the organization whose work depends on the department working a certain way.
- The process will take longer than expected. The original plan was to have the new department structure in place by July 1, 2015, but it actually took until September 20, 2015. Overall, an extra eleven weeks was not bad, considering all of the work involved, and attempting to rush the process would have had negative consequences.
- The process will not be perfect, and unexpected obstacles will arise. Within two weeks of the September 20, 2015 effective date, one of the unit coordinators announced she was leaving the library; a month later, another coordinator also gave his notice. (Both departures were unrelated to the reorganization.) The "perfect" new organizational chart was thrown into disarray while we searched for interim coordinators and long-term replacements. Being open and honest with staff about the challenges, and the commitment to solving them together, helped to ensure that the department kept functioning and progress was not lost during this rough patch.

Suggestions for Further Research

The present case study aims to demonstrate how a well-established change model can be used to guide a major reorganization of an academic library department. As such, it offers a unique look at the intersection between management theory and practice. There is a need for additional studies of this kind in the library field, where most managers do not have any grounding in managerial theory beyond a single course required to earn the Master of Library Science. Likewise, the field would benefit from more library managers evaluating and comparing the use of Kotter's and others' change leadership models in variety of settings (for example, small, medium, and large academic, public, and special libraries, or a variety of units within those types of libraries.)

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Appendix 1: Resource Sharing and Access Services Staff Retreat
January 16, 2015

Morning Session – World Café – Small Group Discussion Questions

1. What are our department's strengths? What do we do really well? What success stories can we tell to ourselves, to our users, to the rest of the Libraries?
2. Where do you see the department going in the next 3-5 years? How will our environment and our work change? How will we develop or improve services?
3. What new skills do we need to develop (as individuals or as a department) to keep up with or advance our work?
4. What should we call our department, now that we do so much more than access services?
5. What are our department's challenges? What things do we need to work on/improve? What's preventing us from offering the best possible service to our users?

Afternoon Session – Department Challenges – Small Group Discussion

1. Consistency in addressing patron issues/meeting user needs across the department, within units, across shifts, etc. (i.e., How do we make sure we're all telling users the same thing and providing the same standard of service?)
2. Consistency of information sharing across the department, within units, across shifts, etc. (i.e., How do we make sure everyone in the department gets the same amount and quality of information?)
3. Consistency of job knowledge and technology skills across the department, within units, across shifts, etc. (i.e., How do we make sure all staff are fully trained and up to the same performance standards?)
4. Duplication of efforts and/or competition for resources across the department (e.g., scanners, carts, packing space, etc.)
5. Consistency of coverage for two desks, 24x5 plus weekends

Tables discussed the challenges above using the following "frames:"

1. What organizational or structural changes could address your table's challenge? (Unit size and composition, reporting structure, etc.)
2. What training or personnel-related changes could address your table's challenge?
3. What physical space changes could address your table's challenge?
4. What technology, tools, or equipment changes could address your table's challenge?
5. Use one of the previous frames or a new one that you come up with. What changes in this frame could address your table's challenge?

Appendix 2: User Services and Resource Sharing – New Organization and Unit Descriptions
July 1, 2015

Terrapin Learning Commons
Responsible for operations related to the Terrapin Learning Commons on 2nd floor of McKeldin and across all libraries, including TLC Tech Desk, Makerspace, equipment loan, etc. Billing for equipment loan moved to Billing unit.

1 FTE – Librarian – Head of Learning Commons
1 FTE – Learning Commons Coordinator – desk oversight, student supervision
1 FTE – Account Clerk III – Copy/print services, financial accounts
1 FTE – Library Services Specialist – TLC Tech Desk & Makerspace support
1 FTE – Contingent 1 – Library Services Specialist – TLC Tech Desk & Makerspace support
+ Cross-trained staff from other units for desk support

Late Night
Responsible for building operations and 1st and 2nd floor service desks between 11pm and 8am, Sunday-Thursday. Assists other units with retrieval, scanning, processing, etc. during Late Night and during day shifts when Late Night is not in operation.

1 FTE – Late Night Coordinator
1 FTE – Library Services Technician – Library Services Desk
1 FTE – Library Services Technician – TLC Tech Desk

Billing, Community Borrowers, & User Accounts
Responsible for tasks related to billing and Community Borrowers, as well as queries related to user accounts (address updates, affiliate privileges, etc.) Takes on billing for TLC equipment loan.

1 FTE – Billing Coordinator
0.5 FTE – Library Services Specialist – billing support (shared with Resource Sharing & Reserves)
0.5 FTE – Coordinator – billing support (shared with Library Services)

Resource Sharing & Reserves
Combining tasks of reserves and interlibrary loan. Materials retrieval and packing/shipping become the responsibility of Collection Maintenance and Retrieval and Logistics and Periodicals units, respectively.

1 FTE – Librarian - Head of Resource Sharing
1 FTE – Library Services Specialist – interlibrary borrowing
1 FTE – Library Services Specialist – interlibrary lending
1 FTE – Library Services Technician – document delivery, borrowing and lending backup
1 FTE – Contingent 2 – Library Services Technician – document delivery
1 FTE – Contingent 2 – Library Services Specialist – reserves, ILL backup
1 FTE – Library Services Specialist – reserves
0.5 FTE – Library Services Specialist – reserves, ILL billing (shared with Billing)
+ Cross-trained staff from Late Night for support in January & August

Logistics & Periodicals

Responsible for back-end ILS support, offsite shelving requests, packing/shipping operations, holds management, new books, office supplies, etc., plus Periodicals operations.

1 FTE – Logistics & Periodicals Coordinator
1 FTE – Library Services Supervisor – periodicals processing
0.75 FTE – Library Services Specialist – periodicals processing, supplies backup
0.5 FTE – Library Services Specialist – daytime packing/shipping, supplies (shared with Collection Maintenance)
0.5 FTE – Library Services Specialist – daytime packing/shipping (shared with Collection Maintenance)
0.5 FTE – Library Services Specialist – evening packing/shipping (shared with Library Services)

Collection Maintenance & Retrieval

Responsible for collection maintenance activities throughout McKeldin, including reference collection, realignment/weeding/shifting projects, retrieval of materials for holds, ILL, and reserves, searching for lost/missing/claims returned items, and management of Severn Library operations.

1 FTE – Collection Maintenance & Retrieval Coordinator
1 FTE – Library Services Specialist – shelving, retrieval
0.5 FTE – Library Services Specialist – reference collection maintenance (shared with Logistics & Periodicals)
0.5 FTE – Library Services Specialist – retrieval, special projects (shared with Logistics & Periodicals)
0.5 FTE – Library Services Specialist – special projects (shared with Library Services)
0.5 FTE – Library Services Technician – shelving
0.5 FTE – Contingent 2 – Library Services Technician – collection realignment, special projects

Library Services

Responsible for operations of Library Services Desk during evening & weekend hours, and oversight/management of the Desk at all other times, including training and safety & security. Also manages virtual information services (LibChat & LibAnswers)

1 FTE – Library Services Desk Coordinator
1 FTE – Library Services Supervisor – weekday closing/weekend
1 FTE – Contingent 2 – Library Services Specialist – student supervisor
0.5 FTE – Library Services Technician – evening/weekend
0.5 FTE – Library Services Specialist – evening/weekend
0.5 FTE – Coordinator – weekday desk support (shared with Billing)
0.5 FTE – Library Services Specialist – weekday opening (shared with Collection Maintenance & Retrieval)
0.5 FTE – Library Services Specialist – weekday closing/weekend (shared with Logistics & Periodicals)

Appendix 3: Reorganization Task Groups – Charges and Timelines

The task groups below will work to plan for processes and procedures associated with the reorganization of the department of User Services and Resource Sharing. All task groups will include representatives of the relevant units, and will be expected to communicate with others in the department as needed to complete their work. Deliverables for each group, including lists of next steps, are due to the Director of User Services & Resource Sharing by the deadlines below.

1. Student Assistants Task Group

This group will create a plan for hiring, training, and scheduling students to support three units within the department: the Library Services Unit, Collection Maintenance Unit, and Logistics and Periodicals Unit. Key questions:

- How will students be scheduled to ensure that retrieval, packing, and shipping happen in an accurate and timely way to support course reserves, interlibrary loan, document delivery, and patron-placed holds?
- How will students be scheduled to provide adequate Library Services Desk coverage?
- How will students share assignments between units? (i.e., will students be scheduled to work just the desk, or will they be expected to work on Logistics & Periodicals or retrieval tasks during their shifts?)
- How should L&A expenditures be requested and tracked? (i.e., should we continue to request separate student budgets for the desk, circulation, and processing, or combine/separate them in some other configuration?)
- What coordination, if any, should be established for hiring, training, and scheduling students in the Terrapin Learning Commons, Late Night, and Resource Sharing & Reserves units?

This group will need to collaborate with the Searching & Retrieval Task Group and Packing & Shipping Task Group as needed to inform decisions related to student scheduling and work flows.

Members: 6 from Library Services, Collection Maintenance & Retrieval, Late Night, Resource Sharing & Reserves, Logistics & Periodicals, and Terrapin Learning Commons

Deliverables: Detailed procedures for the processes named above, including a draft student schedule incorporating desk, logistics, and retrieval workflows, a list of technology or supplies required to implement them, a plan for assessment/quality control measures, and a list of next steps for implementing the Task Group's recommendations.

Deadline: Friday, July 31, 2015

2. Searching & Retrieval Task Group

This group will create processes and procedures for managing the search and retrieval of materials from McKeldin Library stacks to support course reserves, interlibrary loan, document delivery, patron-placed holds, and "claims returned" items. Key questions:

- How will retrieval requests for reserves, interlibrary loan, and document delivery be communicated from Resource Sharing & Reserves to Collection Maintenance?
- How will retrieval requests for patron-placed holds be managed by Collection Maintenance?
- How will search requests for "claims returned" items be communicated from Billing & User Accounts and Resource Sharing & Reserves to Collection Maintenance?
- What are the expectations for turn-around time on requested materials? How will Collection Maintenance ensure that this work is completed on schedule?
- How will Collection Maintenance track request status, including items that are not found, and communicate that information to the requesting unit and/or users?
- How will Collection Maintenance deliver retrieved materials to the requesting unit?
- For which daily hold lists will Collection Maintenance be responsible? What are Collection Maintenance's responsibilities regarding daily hold lists at other times of the day (e.g., Late Night)?
- What student and staff resources are needed to perform and coordinate this work?
- How will this work be monitored and evaluated?

Members: 6 from Library Services, Billing & User Accounts, Collection Maintenance & Retrieval, and Resource Sharing & Reserves

Deliverables: Detailed procedures for the processes named above, including a daily schedule of retrieval tasks, a list of technology or supplies required to implement them, a plan for assessment/quality control measures, and a list of next steps for implementing the Task Group's recommendations.

Deadline: Friday, July 17, 2015

3. Packing & Shipping Task Group

This group will create processes and procedures for the Logistics & Periodicals unit to manage the work of packing and shipping materials from Resource Sharing & Reserves and the Library Services Unit to other libraries, and of receiving materials from other libraries intended for Resource Sharing & Reserves, UMD users (patron-placed holds, paging, and department delivery), or to be returned to McKeldin shelves. Key questions:

- How will the Logistics & Periodicals unit receive materials from Resource Sharing & Reserves, Collection Maintenance, and the Library Services Unit for shipment to other libraries?
- How will the Logistics & Periodicals unit deliver incoming materials to Resource Sharing & Reserves, Collection Maintenance, and the Library Services Unit for processing and/or shelving?
- What are the expectations for turn-around time on materials received or shipped? What is the maximum allowable time for processing incoming and outgoing shipments?
- What are the key times in the packing/shipping/receiving processes each day? (i.e., what are the times we need to consider when scheduling students and staff?)
- How are items that disrupt normal workflow (e.g., items missing paperwork, items with incorrect labels, etc.) handled?
- What student and staff resources are needed to perform and coordinate this work?
- Are there suggestions from the spring 2015 Business School group that can be implemented to improve the efficiency of our packing, shipping, and receiving operations?

Members: 5 from Library Services, Collection Maintenance & Retrieval, Logistics & Periodicals, and Resource Sharing & Reserves

Deliverables: Detailed procedures for the processes named above, including a daily schedule of packing/shipping/receiving tasks, a list of technology or supplies required to implement them, a plan for assessment/quality control measures, and a list of next steps for implementing the Task Group's recommendations.

Deadline: Friday, July 17, 2015

4. Library Services Desk Staff Schedule Group

This group will draft a Library Services Desk schedule for fall/spring semesters. Key questions:

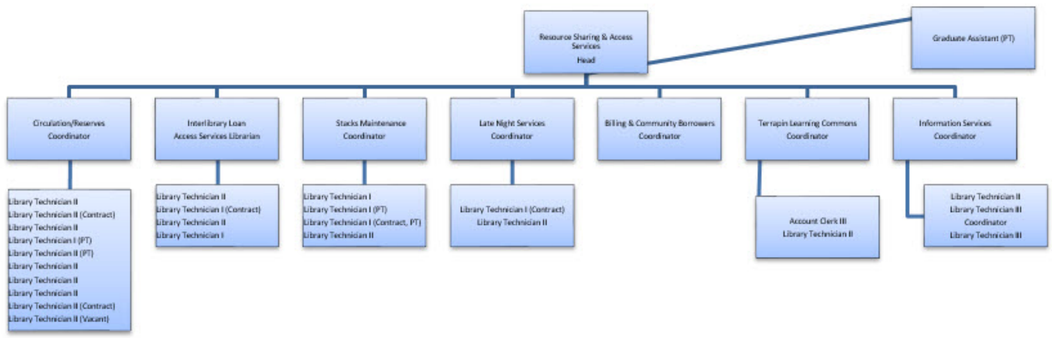
- What hours should be covered by staff from units other than the Library Services Unit?
- What is each unit's responsibility for covering the desk (i.e., how many hours will each unit/staff member cover each week? For how many hours will they provide backup coverage?)
- How will call-outs be communicated and handled to ensure consistent and equitable desk coverage?

Members: 3 from Library Services, Logistics & Periodicals, and Resource Sharing & Reserves

Deliverable: Complete Library Services Desk staff schedule

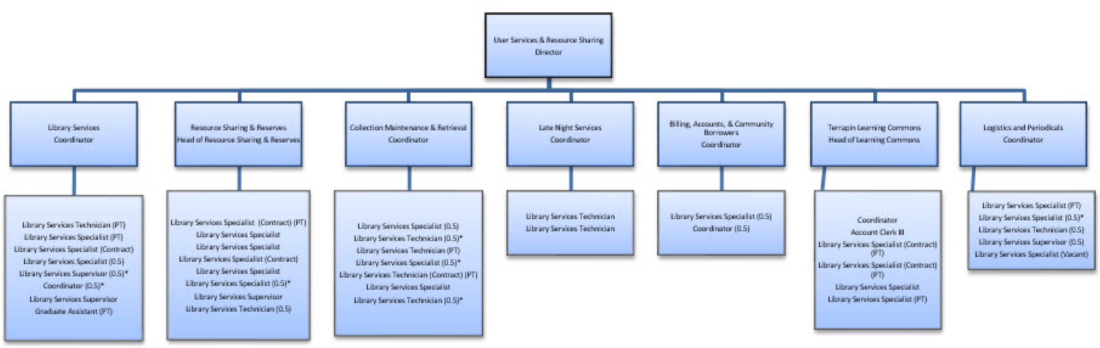
Deadline: Monday, July 6, 2015

Appendix 4: Resource Sharing and Access Services – Organizational Chart, October 2014

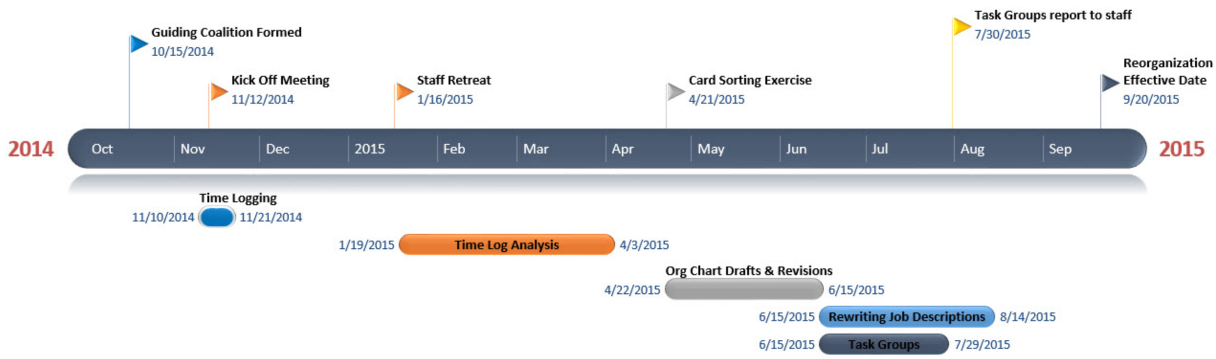


Appendix 5: User Services and Resource Sharing – Organizational Chart, July 2016

Note: * indicates primary assignment for staff with shared reporting



Appendix 6: Timeline



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