

Change Management: A Microcosm



Presenting

- Bill Verner - Head, DUL Monograph Acquisitions (MonoACQ)
- Natalie Sommerville - Head, DUL Resource Description (RD)

The MonoACQ Transition Team:

- Stephen Conrad - Team Lead, Western Languages
- Fouzia El Gargouri - Team Lead, Non-Roman Languages (absent but contributing)
- Sara Biondi - Acquisition and Processing Specialist, Non-Roman Languages
- Bronwyn Cox - Acquisition and Processing Specialist, Western Languages

Dramatic Opening Credits

In January of 2021, the decision was made to eliminate the section known as *Shelf Prep* and to relocate its physical processing workflows into the Monograph Acquisitions Department. This change would become effective at the start of Fiscal Year 2022.

For the remainder of FY '21, a small group of leaders known only as the MonoACQ Transition Team took on responsibility for managing the coming change.

These are their stories.

Scope and Acknowledgments

- This was a successful reorganization that allowed core work to proceed uninterrupted and with gained efficiency.
- This presentation is not about those efficiencies, nor about the specific workflows involved.
- Our focus is the process of managing a department through unanticipated change in a healthy way.

Scope and Acknowledgments

- This process was “small change.”
- Lessons learned can be applied to broader change impacting the entirety of an institution.

Scope and Acknowledgments

- Natalie and Bill relied on Dracine Hodges, AUL for Technical Services, for guidance and feedback during our planning phase.
- We were grateful for the generosity and expertise of Lesley Looper and Corrina Carter.
- Dan Maxwell was crucial to the Transition Team's success.

Change Management: A Microcosm

- Direction
- Trust
- Empowerment
- Support

Direction

- What are we doing?
 - Seeking an opportunity for productive change, arising from unanticipated and ill-timed vacancies.
 - Initiating a new “Lifecycle” approach to TS work, collocating processing workflows into single departments.

Direction

- What are our objectives?
 - Reduce handoffs and “pain points” in processing workflows
 - Maintain or exceed productivity
 - Assess benefits of “Lifecycle” approach
- What is our timeline?
 - Transition fully implemented as of FY22

Trust

- Clarity
- Transparency
- Listening

Trust

- Clarity
 - Communicating the logic behind decisions made by the Department Heads.
 - Establishing the Transition Timeline

Trust

- Transparency
 - Why is this happening now?
 - Vacant positions have been deprioritized.
 - Capacity from these positions will be reallocated to other functions.
 - Monograph Acquisitions will have to take up the slack.

Trust

- Transparency
 - What is the likely impact on staff?
 - You *will* be doing more work than before.
 - Our preexisting work *may* slow down.
 - We are not being asked to do the work of others; this is now *our* work.

Trust

- Listening
 - Be Realistic, but Be Flexible
 - We have a timeline; with good reason, we can adjust it.
 - Be Willing to Be Challenged
 - Recognize that those doing the work are the experts.
 - Your ego as a leader could not be less important.
 - Provide a Safe Space for Feelings
 - Change can, in fact, be hard.
 - The expression of frustration can be productive.
 - It can also be hindering, so set limits.

Trust

DO. NOT.
SPIN.

Empowerment

- Time & Scheduling
 - Explicit permission to adjust schedules and accommodate this task as a priority
 - Direct access to staff time and resources
- Methodology & Tools
 - Ownership of the process & team buy-in
 - Agency leads to motivation on all levels
- Decision-making
 - Explore workflows & integrations with other processes
 - Pivot to training and go-live

Support

- Tools
 - DULTS documentation on Sharepoint > Confluence wiki
- Education, Equipment & Supplies
 - Hands-on training with relevant equipment & continuing support from experts to troubleshoot
- Access to Experts
 - Being treated as peers & fellow experts rather than trainees
- Back-up - trust from all quarters

Outcomes & Benefits

- New eyes = new efficiencies
- Innovations across workflows & cross-training opportunities
- Peer-led change is less disruptive
 - High level of trust in peers to understand pain points
 - Training designed and executed by institutional experts
 - Right-size training and tools - not one-size-fits-all

In Conclusion

- Trust and support are crucial investments that pay off in moments of change.
- Clarity, transparency, and listening during the change process reinforce trust.
- Empowerment builds confidence and facilitates acceptance of Change.
- With these underpinnings, our staff was strengthened by our recent change process.