Anything Can Happen in the Zone: Library and Departmental Change Driven by Migration to a Cloud-Based Library Management System

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Introduction

It has certainly been written before, but has now become a constant: as the information landscape changes, and user demands follow, academic libraries have been forced to change to keep pace. Perhaps not literally forced, but trends and pressures both internal and external to their institutions have caused smart library administrators to track and respond to these forces, and to shape or adapt the organizations over which they have control as much as possible. Additionally, the actual work done inside libraries has changed over the years in response to technological changes – sometimes responding quite after the fact, while other times anticipating and taking advantage of new technologies or services as they develop. Librarians have also been predicting future technological or social developments and attempting how to best respond to them while also keeping the tenets and beliefs of the profession at the forefront. All of this has been reported before, certainly, but I posit that today we are seeing a convergence of organizational resource alignment (the dreaded, yet perpetual "re-org") and technological change which has the potential to allow great efficiencies for small to medium sized academic libraries, provided their leadership can steer them through necessary adjustments great and small. This shift entails embracing new technologies, and facilitating their adoption by staff, through measured personal-level support and then by directly abandoning (or scaling back) legacy services and workflows. For many libraries, these types of changes may have been attempted in the past through other means and at a smaller scale, and that may have been acceptable. The systems updates of today, however, allow organizational change at a larger scale and with wider impact.

Literature review

As with many current issues in libraries, it should be argued that this type of change is nothing new. One could cite dozens of articles from the previous twenty years to trace the discussion around the idea that rapid technological change pressures libraries to change in order to keep pace with the demands of their users and the expectations of their universities. Clifford Lynch[1] recently traced 30 years of interactions between libraries and new technologies, David W. Lewis[2] has written frequently on how technology has disrupted academic libraries, and the need to adopt new technologies has been a central theme in the biennial ACRL Top Trends in Academic Libraries reports.[3] Arnold Hirshon in 1991[4] quite accurately described the landscape of the present day in an article examining how Technical Services departments specifically needed to change and adapt to help libraries succeed. His point then was that those within the libraries saw the traditional consideration of the processes and activities undertaken by Technical Services departments as the center of the local information universe. This "Ptolemaic versus Copernican"[5] view of the information universe described by Hirshon refers within his article solely to the viewpoint and status of Technical Services within a library, but could be applied to any library unit, department, or service that has been forced to redefine itself as outside pressures or movements (technology, organizational status, etc.) have acted upon them. Truly, while in general all library staff have a high service motivation related to providing

access, assisting discovery, or aiding preservation, those in each separate area of the organizational chart quite naturally see their specific work as being central to the organization.

This, of course, can often make strategic planning, system migrations, and staff or space re-organizations difficult to implement, as change is often fought by those on the inside who see it as unnecessary, specifically if the changes are interpreted as challenging the importance of a task in which any single person holds great pride. Additionally, according to the American Association of University Professors[6] and others,[7][8] higher education has come to resemble the business world too much, galvanizing librarians already not inclined to looking outside their profession for ideas to become even less so. And yet, Hirshon's article 25 years ago was advocating abandoning "the conventional library organization chart, which neatly divides public and technical services"[9] as well as addressing the broader set of skills needed by those in public positions as they need to interact with systems more often, and conversely, those in the technical positions as they come into contact with the public more often.[10] Indeed, as Gertrude Koh argued quite presciently in 2000, a more apt description of the work that is done traditionally in technical services departments might be "knowledge access management"[11] – a phrase which embraces the fact that while the skills required are similar, there is a "clear ideological transformation … from collections *held* in a library to *access plus*" (166).[12] Additionally, as remarked more than 35 years ago by Michael Gorman,[13] the traditional behind the scenes role ascribed to technical service positions should now also require a more heightened awareness of the front facing, public aspects of their duties. In this model, staff who formerly simply placed orders sent to them by librarians are now expected to assist with requests from students and faculty as well, and additionally to assist with determining the proper way to fulfill that request given a wider array of options than just the firm order – ideally displaying a high degree of customer service as well. This service-oriented and cross-trained orientation is certainly the type of environment many administrators would like to see in their libraries, but getting to that point would often seem to require waiting: for more funding, additional staff, time for training, the proper campus climate, or a few well-placed retirements.

However, this kind of shift is not always planned by choice. A recent article by Doherty and Piper described a similarly intentioned departmental merger aimed at moving "toward a more holistic view of staff responsibilities,"[14] but driven by larger campus forces and budget cuts. Librarians at Carleton University published on their departmental restructuring, inspired there by an increasing shift toward electronic resources, noting a key issue being "the staff and attention accorded to all aspects of e-resource work suffer while a larger portion of staff remain dedicated to long-standing practices in the acquisition, cataloging, and maintenance of books."[15] Additionally, with the increased importance placed on institutional repository management at many libraries, staff restructuring to facilitate institutional repository (IR) processing has also been discussed widely. Connell and Cetwinski specifically surveyed ARL members about their IR staffing and found that technical services staff are highly involved in repository activities, extrapolating from their results that "in general technical services units have not been reorganized."[16]

While there are articles describing the process of system migration to cloud or Software as a Service (SaaS) ILS platforms,[17][18][19] or the mechanics of optimizing the platform's electronic resources knowledgebase,[20][21] none were found to discuss the larger reasons behind this shift aside from cost or usability, nor how Technical Services departments or institutions might change as a result. As stated earlier, these systems offer an opportunity to perform a calculated overhaul of all library services through a full examination of all services, existing workflows, and current staffing levels. As the main public (or sales) page for OCLC's WorldShare Management Services (WMS) states, the intent of the platform of WMS is to allow libraries to "save time and money" as well as "deliver new value."[22] While those libraries shifting to products such as WMS are quite often doing so due to cost issues, the idea of delivering new

value due to the streamlined workflows available has not been discussed as a catalyst for overall institutional change. Doherty and Piper do mention the impact of technology on technical services and its workflows as they outline their departmental merger, and quite rightly point out that libraries are no longer simply "staffed to provide labor intensive services" but have now become "entities providing access to capital intensive information."[23] All of this sounds quite appealing, and in line with Hirshon's description of the vision and focus that should be reflected in a library's organizational structure.[24] Getting to that point is easier outlined than done, however.

In early 2013 our local consortium (PALNI, 23 smaller Indiana academic libraries which share the cost, maintenance and usage of a suite of library management systems) selected WMS from OCLC, and then began the process of migrating data from our old systems into WMS. Even though we wouldn't go live until May 2014, our decisions about which data to discard and which to keep (and where to map it for the new system to access) were made in late 2013 in conjunction with meetings at the consortial level (with vendor and library representatives) and at each institution as we learned what exactly our new system would do, and how we could be working in it once ready. These considerations helped us see how existing workflows and the limitations of our old system combined to create a mindset in Technical Services that we were the center of all services – the Ptolemaic model as put forth by Hirshon[25] – and how that could be adjusted and flipped by the new potential workflows available in our new system.

At the same time, the 50th anniversary of our library building's construction and opening approached,[26] and as we looked through historical photos and documents, several things became clear. First was that the campus student population had more than doubled since our main library was built in 1963, and yet, there were fewer actual seats in the building in 2013 than in 1963. Second, because our collections had slowly taken over the building over the decades, the way in which spaces were organized for collections was shaped not by design but by necessity, resulting in confusing or disjointed spaces. As a result, the library's leadership team (the dean, two associate deans, and two department heads) understood that a great deal of changes to our physical collections spaces were needed at the same time that we were also changing processes, workflows, responsibilities, and the formats of items moving through Technical Services. Quite obviously, this was a large amount of change taking place during the span of a single year (August 2013-August 2014), and needed a thoughtful approach to support a potentially tumultuous period.

Change as a four letter word

Change is hard. For all of us, whether we're asking/pleading/demanding someone else to do something a different way, or if we're the one being asked to change the way we've always done things, there are interpersonal dynamics which contribute to either slow, hinder, or prevent action which are separate from the details of the actual change. Further, in academic libraries, both institutional cultures and professional norms often work against us as well, resulting in a preference towards the status quo, all things being frictionless and equal. Yet, because of the trends and pressures addressed earlier, institutional change must be attempted anyway, often with the aid of a theory or model borrowed from the for-profit world (and therefore immediately perceived as invalid to large sections of wary-eyed academics). At Butler University we took this road when attempting strategic planning and large-scale change, but also used our move toward a next-generation library management system to both inspire and create a sense of urgency (at long last).

Our new Dean of Libraries started the change management process upon her arrival in June 2012 (there had been no previous strategic plan). This process started with analysis of

operations and outcomes based on the data available, as well as gathering feedback from stakeholders, and undergoing a SWOT analysis in order to take a step back and examine where we needed to go. The library's leadership team worked with a management professor from the university's College of Business to take all this input and develop a plan with mission and vision statements, as well as five strategic priorities with more detailed annual goals fitting underneath the priorities.

The rollout of the Libraries' new strategic plan coincided with the final stages of the selection process undertaken by PALNI to choose a new management system for the entire consortium, ideally a web-scale, Software as a Service system. As the leadership team began thinking about how many potential changes were coming for the building, collections, and staffing for Butler Libraries over the next few years, we also had the ability to look forward to potential workflow streamlining provided as a benefit of PALNI's move to a next-generation, web-scale system. Many staff were looking forward to the exciting and rewarding outcomes resulting from all of these changes, but the fact that there were so many potential changes to make speaks to the fact that others were quite happy with the current stasis.

At this point, a staff member recommended that the leadership team take a look at the wisdom offered by William Bridges in his book *Managing Transitions*.[27] Bridges' book is aimed at helping businesses manage their transitions – whether brought on by mergers, technology, or business model changes – but it was quite apt for libraries as well. In fact, Koh's description of the factors driving change in libraries ("economic pressures, user expectations and technology"[28]) fits quite well alongside Bridges' description in the introduction to his book of how companies face transitions due to recession, government, and communications or technology, noting that "holding onto familiar practices will leave organizations out in the cold, while more savvy competitors will move ahead."[29] Certainly similar warnings have been sounded regarding libraries over the past 20 years, so in this case we found that solutions designed for the corporate world actually did have a place in helping an academic institution navigate change.

The leadership team began reading *Managing Transitions* as a group and discussing its recommendations and case studies at our biweekly meetings. Bridges points out early in his book that "it isn't the changes that do you in, it's the transitions."[30] He then identifies three phases of every transition: a period of ending or letting go, followed by "The Neutral Zone" and finally the new beginning.[31] We put this into practice by right away beginning to schedule meetings to encourage everyone to take part in designing the future for the library, as Bridges also states that it's important for leaders to provide a vision of where the organization is headed so that there can be clear communication about the goal. But it is true that those goals are not always exciting to all staff. This is where the acknowledgement of what will be lost and what will end is important as well. Our dean planned a special thank you session for those staff who had been working at the library more than 15 years, where she spoke about all the changes that had already taken place in library services and technology across the span of their careers (some of which stretched back more than 40 years). We took pains to remind staff that they had been through transitions before, and that while those looming seemed ominous or frightening, that they would get through them. Smaller group staff meetings outlined what services, workflows, or procedures would be ending in order to make room for new plans, and leaders reminded staff that we would soon be stopping many activities with which they had grown comfortable, but that they were important members of the team and would continue to be valuable after the changes were finished.

After acknowledging the endings, we began to navigate Bridges' "Neutral Zone", which is where the endings are not yet complete, but the new beginning is also not yet realized. This time, described as "the limbo between the old sense of identity and the new"[32] naturally took place for us while we were engaged in the system migration to WMS – still operating in our legacy system, but beginning to grasp the outlines of our future procedures. The Neutral Zone

as described by Bridges is a difficult time for staff to endure but also a very creative time, where staff can begin to visualize how they will manage the transition between the old and the new, their speed and readiness depending on their own personality and view of the changes taking place. At this time, PALNI hosted a session facilitated by outside consultants where all staff took a Change Style Assessment,[33] which identified their personal change style: Collaborator, Protector, Initiator, or Questioner. Having these identified for our staff helped us all relate to each other, and see behaviors in the proper light. Each style plays a role in helping an organization through change, and having these styles known about and across all staff at Butler helped us navigate occurrences that might be defined by Bridges as "Neutral Zone"[34] behaviors. For example, Questioners are seen by other styles as slowing down change by asking too many questions, but their input is valuable to the outcome by making sure every angle is covered before moving forward. Initiators are seen by other styles as pushing forward too hard without regard to people's feelings, but without their energy and vision no change would occur. As we encountered rocky moments in our system migration or organizational changes, it was valuable to remember Bridges' reminders about the chaotic yet creative time we were living through (reminding the author of the similarly titled "Zone" in Andrei Tarkovsky's film Stalker,[35] but that's a whole other paper), and that each member of our staff would react to change in a different way, though all contributed in getting the organization to meet its goals.

Most staff, but specifically those in Technical Services, were also encouraged to take part in weekly webinars and training sessions organized by OCLC where we learned the functionality, configuration options and limitations of WMS. It was their responsibility to participate in the right meetings, but also to read documentation and view tutorials on their own time so that they could bring questions, issues, or new ideas for discussion. We all kept a lot of notes, sent a lot of emails back and forth between ourselves, our consortial partners, and the vendor, in order to ensure we fully understood how we would be doing our daily work in the new system once it was ready. It was important for supervisors to acknowledge the diverse change styles across their staff, and encourage some to speak up, discuss their hesitancies, or to outline a plan for navigating a potential problem. This ensured that all staff had the ability to contribute to how we developed our new reality, though there was no choice about the going. The leadership team developed the vision and the goals based on the kind of library we wanted to be in the future, and we leveraged the system migration and support from Bridges and the change style assessment to get there.

The migration and its discontent

Aside from the work around pulling and refining data, there were many steps of the actual migration project provided by OCLC which helped us as a library think differently about what Technical Services does for the library, and by extension, what the outdated processes, workflows, rules, and organizational methods we'd applied to our collections were actually meaning for our patrons. Truthfully, whether Technical Services librarians and staff see their work as central to the operation of a library (the Ptolemaic model, again), or are simply in reaction to outside forces (following the Copernican model),[36] everything done by those in the department was undertaken to improve access. However, as the patterns and modes of access changed, the collections remained governed by the same rules and procedures which were now outdated. What were once ingenious solutions to complicated problems became simply complications themselves, discouraging or delaying actual use by their seemingly obtuse nature.

For example, while the standard argument in favor of retaining periodical check-in as a workflow is usually "to prove that we received what we paid for" (i.e., fiscal responsibility), another was that the check-in process created new lines for each received issue in our OPAC,

documenting availability. While true, this argument ignored the fact that we'd been pushing more and more subscriptions to online-only access – and those at the print + online level could just as easily be accessed via the Journals A-Z lookup instead of walking over to the library. Post-migration, once we had all our serial holdings available in WorldCat Local, it became apparent that the multiple lines for each volume holding on periodical record displays forced the user to scroll and scroll down the page in order to find any further information on the title. Since the check-in process is what adds those additional lines with each new issue (or volume), and since our total number of print periodicals were dwindling, this became the time to end check-in, and instead we now use a detailed summary statement to reflect the details of our print holdings, which can be updated as necessary (full-volume binding, for example).

This specific example allows an outline of how the various change styles interacted during our internal debates regarding the migration and its inspiration for further change. The Initiator type looked at the issue and saw inefficiencies, staff time wasted, and the ability to realign staffing by making a technology-aided decision. The Questioner type made sure that the decision considered exactly how data was to be preserved, what the new workflow steps would be, who would do them, and how would we communicate the change to users who still did check our catalog for print periodical availability. The Protector type saw the situation as potentially hurtful for staff members who might have taken pride in the work they accomplished as it was being taken away and sought encouragement and consideration. Finally, the Collaborator type ensured that all potentially interested parties were involved once options were being discussed. It was useful for all of us to be able to self-identify and understand the style types displayed by others, as the acknowledgement that each type played a role in the decision-making process helped reduce potential bitterness felt by those involved if they would otherwise have felt unheard. As an Initiator, it was useful for me to remember that Questioners were not actually slowing us down, but rather making sure all angles were covered – the change was still going to happen, but involving everyone appropriately assisted with the transition.

While our change management process assisted us in leading staff through the migration, there was no question that the new system, forcing us to re-think all our legacy system workflows, and examining whether our patrons really gained a benefit from our labor, assisted library leadership in reaching our new strategic goals. Individual process questions became bigger, and soon decisions on individual workflow steps compounded to pose questions about the balance of the organization and the definition of staff positions and departments. On the periodical check-in example, the analysis from the leadership level was that the balance of print versus online access had shifted, and we couldn't afford to fund print periodical handling as we had in the past – especially not at the expense of new, higher-demand opportunities. The staff position formerly responsible for check-in (which also supervised government documents check-in, which also ended after we pulled out of the GPO program) was then available to be repurposed in support of our institutional repository and other scholarly communication initiatives. This area was a key new initiative in our library strategic plan, and again, we could not have moved resources into a high demand area without pulling resources from another. These changes necessarily involved ending a workflow which once had value, but the change management activities around understanding our new reality, and recognizing the efforts and values of the past, helped staff understand why these changes were essential.

The realignments also allowed us the space and ability to re-think our public services. With many workflows and responsibilities formerly handled in a quite robust fashion by full-time Technical Services staff now streamlined or eliminated, any remaining streamlined duties could now also be moved around between departments – handled by the student workers in other areas, for example. At the same time, the Associate Dean for Public Services also took advantage of the changes made possible by our system migration to propose combining our

circulation and Information Commons (student-staffed reference and technology help) service points. This consolidation also freed up full-time staff to move away from staffing a service point, and allowed them to take over certain aspects of collections work previously handled in Technical Services. This constant shift and simplification of formerly Technical Services duties allows staff in that area to become efficient multi-taskers – taking advantage of how easy WMS is to use by both simplifying their previous responsibilities as well as adding others which are now easier to learn. The web platform for WMS removes data and actions from functional area silos native to legacy systems, and allows staff to see the bigger picture of library management – giving them more ownership and responsibility.

Access to our old system was to be discontinued at the end of June 2014, but was extended a few more weeks so that we could be sure we'd run all end-of-year reports and pulled any other data that we needed. But, since we had been live and using our new system since the beginning of May, this allowed more than two months of running two systems in parallel. During this time period we would learn the new system's functionalities with hands-on practice not allowed by our months of webinars and tutorials, and also make sure we were taking advantage of new workflow options the new system allowed – instead of duplicating old processes in the new system. The PALNI consortium assisted by paying for in-person visits by OCLC consultants to a handful of libraries, to analyze existing processes and workflows, and then give both recommendations on what was necessary, excessive, no longer a concern in the new system or no longer available in the new system, as well as detailed examples of what those workflows would look like in the new system. During their time, they visited all areas of the library so they could see daily work being done in the old system, allowing a clear understanding of our old processes and their local importance. The report eventually generated was a great help to all libraries in PALNI as they worked through taking advantage of the new system. Obviously, a real concern among consortial and library leadership was that many group libraries would simply try to take their decades-old workflows and try to re-create them in a new system which was not designed for such workflows anymore. The benefit of the consultants' report was that that it spoke directly to what libraries were doing and what they could be doing, based on first-hand observation, combined with deep knowledge of the new system. It was a great tool in redefining how we did things at Butler, and at libraries across the system. It was also great that we were a model for other smaller libraries – to show that if Butler could do (fill in the blank), they could too.

Conclusion

The outcome of this re-aligned library should be a greater array of services and a wider selection of information resources provided to our users; keeping to our core tenets while providing efficiencies desired and appreciated by our larger institutions. To do this, the functions of Technical Services areas need to be streamlined with regard to the handling of print resources, providing the proper amount of handling and care so as to still provide efficient access without becoming excessively laborious. Thankfully, next generation management systems such as WorldShare Management Services from OCLC provide streamlined workflows to allow a reduction in steps by staff, which will also allow libraries to shift personnel to other services with a high potential demand, using the same skills. Or, as Koh imagined in 2000, former Technical Services areas will become true knowledge access managers, delivering "customized and individualized packaging"[37] – creating more targeted LibGuides, for example. And a re-aligned library providing such services is possible, given the will to make changes to processes and areas that have remained unchanged since automation. It is this next generation of automation which is allowing such organizational change to be undertaken; and that it can happen at the same time as a system migration should be seen as an assistance, not a

potential catastrophe. But all of this requires library leadership to guide their personnel along the journey, to provide a vision of the future while recognizing the past, honoring skills and dedication, and providing assurance that there will be difficulties but the goal is rewarding.

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