Facilitating Organizational Change
The Human Side

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Case Study: Strategic Planning

• Describe inclusive nature of process.
• Facilitated group approach.
• Full staff involvement.
• System-wide thinking.
• Focus on human factors –
  Clarity of purpose
  Communication
  Managing input and feedback
  The importance of valuing work
“The only person who likes change is a baby with a wet diaper.”

-- attributed to Mark Twain
Process Design

• Open and transparent process.
• Dean not directly involved.
• Made information about the process freely available to everyone.
• Challenging but fun.
• Designed to receive input from staff.
• External learning experience.
• Encourage system-wide thinking among task force members and all library employees.
Description

- Medium-size academic library.
- Task force of thirteen members.
- Eight-month planning process.
- Resulted in 36 recommendations/action items.
- Focused more on ‘new’ work, less on traditional.
- Created new faculty and staff positions.
- Improved decision-making and accountability in the organization.
- Did not recommend a reorganization.
Used a Facilitator

- Significant experience in the guidance and support of a group process meant that the task force members could focus on the work.
- Marked the first time the approach was taken in the library.
- Created new approach to normalize group processes going forward.
Communication and Feedback

- Set up a website (LibGuide).
- Open office drop-in hours.
- Regular updates at administrative meetings.
- Email to the TF as group or as individuals.
- An anonymous input form.
- Meeting with all library units.
- Published FAQ on website.
- Open forum meetings on TF progress.
- Updates in the weekly library newsletter.
Additional Work Groups

- Environmental Scan group set up to review social, technological, economic, and political trends.
- A decade of LibQual survey results analyzed.
- Survey Group created to gather data among library user groups and report findings.
- Resulted in more than 25% of library staff directly involved in the planning process.
Resources Used

- Readings from the library literature, plus other sources, about technology-driven change.
- Benchmarking and best-practice review.
- Reports generated by support groups and TF members.
- Presentations by invited speakers.
- External Learning Experience - Field trip.
External Learning Experience

Other sectors of the economy affected by technology changes over the past decade?

Local Newspaper

- Newspapers endured severe changes in their business model.
- Found common topics relevant to academic library work.
- Discussion helped inform TF members about information and content delivery in a different environment.
- Stimulated thinking about the library’s growing role as content provider in the institutional repository function.
- How to deal with potential fears and disappointment radical change can sometimes cause among employees.
Human Factors in the Process

- Importance of transparency - inclusion - communication.
- Creation of multiple information pathways – web – based information, face to face, meetings, speakers and presentations, email, and regular periodic updates.
- Availability of planning resources open for review, speakers offering new ideas, open discussions of change, analysis and sharing of best-practices, shared understanding of issues faced by academic libraries.
- Effective group process – use of facilitator, clear agenda and timetable, group norms.
- Provide plausible and viable recommendations.
Questions at End of Program