Appendix C

Summary of Resources Used across Change Stories

The contributing authors identified resources used during the change process at their institutions. Because only major activities are included in this listing, readers may find additional activities referenced in the individual stories. One important caveat to note—resources other than those listed here and in the stories may have been used during the change process at these institutions, but the contributing authors may not have referenced them in their narratives.

Resources are grouped as follows:
- Data Sources and Readings
- Frameworks
- Activities
- Consultants
- Tools and Technology
- Other (used to refer to institutions’ specific resources such as strategic plans or websites)

Strategic Planning

Miami University

Data Sources and Readings


Activities

• Steering committee and consultants worked with community to form vision.
• Consultants conducted listening meetings with library departments.
• Formed three additional teams and developed the philosophy, guiding principles, and service categories that became the foundation for the new organizational structure.
• Consultants produced a 260-page integrated master plan.
• Middle managers implemented plan.
• Recruited, hired, and onboarded seventeen new staff members.
• Transitioned employees into new roles.
• Merged reference and circulation desks.
• Re-envisioned collection development duties for librarians.
• Developed team and leadership training plans.

Consultants

• brightspot Strategy
• Perkins & Will

Montana State University

Data Sources and Readings

• See change story for a brief literature review about the Balanced Scorecard framework.
• Assessment report of an expired library strategic plan
• LibQUAL survey data
• ClimateQUAL data
• Results from the Northwest Commission on Colleges and Universities
• Data from SOAR survey
• Readings for staff (see note 13 in the change story)

Frameworks

• Balanced Scorecard

Activities

• Offered Balanced Scorecard in-house workshops.
• Working group created their own charge titled “Roles, Responsibilities, and Expectations.”
• Consultant worked with the library staff to create value statements, mission, and vision.
• Staff read two articles before filling out SOAR (strengths, opportunities, aspirations, results) survey.
• Consultant held several on-site workshops with staff to develop strategy maps related to strategic objectives (see example in figure 2.2 in change story).
• Formed new UX&A team.
• Created new strategic plan.
• See figure 2.3 in change story for additional initiatives underway.

Consultants

• Martha Kyrillidou, QualityMetrics, LLC

Tools and Technology

• Tableau (data visualization software for strategic plan dashboard)

Other

• The Montana State University Library Strategic Plan 2018–2024. https://www.lib.montana.edu/about/strategic-plan/.

University of Tennessee, Knoxville

Activities

• Created the Strategic Achievement Review (StAR) team to measure progress toward the strategic plan.
• Developed website with dashboard to collect progress toward achieving strategic goals.
• Planned celebrations and awards to recognize staff contributions to the strategic plan.
• StAR team experimented with different methods to get staff to make contributions.

Other


Wesleyan University

Data Sources and Readings

• Data from a library staff survey
- Data from a faculty survey
- Student survey data from institutional research
- Information gathered at two open fora for faculty to share their teaching and research needs
- Benchmark comparison data from external sources
- An analysis from a campus facilities planner about the state of the library facilities

**Frameworks**


**Activities**

- Conducted library external review.
- Developed library strategic planning with staff.
- Hired a digital projects librarian and created a digital lab.
- Staff began working on pilot projects to move library forward.
- Completed LMS implementation.
- Prioritized vacant positions and began promotions, reconfigurations, and hires related to the reorganization process.
- Responded to turnover in top library leadership position for the second time.

**Other**


**Reorganization**

**MIAMI UNIVERSITY**

**Data Sources and Readings**

- LibQUAL
- ClimateQUAL

**Frameworks**

- Design Thinking
Activities

- Consultants led visioning process with steering committee, and then the library formed two additional working groups.
- Used activities borrowed from improvisational acting class (such as “yes, and…”) to build community among working groups.
- Consultant and steering committee developed service philosophy, guiding principles to direct service strategy and vision for new organizational structure.
- Looked at structure at peer institutions.
- Developed new service categories, which became the structure for the departments.
- Hired a new communication and marketing staff member.
- Conducted process mapping activity with one of the working teams to help them visualize complex work processes.
- Completed an integrated master plan that included a space plan, vision, and framework for a next-generation library.
- Created a new hiring plan and began the hiring process.
- Provided professional development training to build teamwork and trust.

Consultants

- brightspot Strategy
- Perkins & Will
- Tom Heuer, a Forsythe Chair in Entrepreneurship and Clinical Faculty from the Miami University Farmer School of Business, and an expert in the Five Practices of Exemplary Leaders Model and its Leadership Practices Inventory.

UCLA

Frameworks


Activities

- Created a user engagement reorganization timeline (see figure 7.1 in change story).
- Analyzed three proposed organizational structures.
- Created and implemented the User Engagement matrix organizational chart (see figure 7.2 in change story).
- Teams and divisions followed the strategic plan guidelines to establish norms, responsibilities, and roles.
- Created opportunities for staff to share ideas such as open mic events and division shout-outs.
• Filled positions.

Other


**University of Texas Arlington**

**Data Sources and Readings**

• Data from staff surveys
• Data from ethnographic observations of facility and observed user activity outside the library
• National Survey of Student Engagement (NSSE)
• Student experience survey
• National Association of Colleges and Employers Annual Survey

**Frameworks**


**Activities**

• Nine task forces formed and asked to review best practices in several areas at peer and aspirational institutions and to conduct observations of facility usage and user activities outside the library.
• Held a week-long retreat with guiding coalition to review all data and to develop the CXI vision.
• Staff completed two surveys, one to determine staff knowledge, skills, abilities, and preferences, and one to prioritize their top seven job preferences, their bottom five positions, and up to four areas of leadership interest.
• Dean had individual meetings with staff, announced the new organizational chart, and reassigned 94 percent of staff in the organization.
• New leadership team developed a list of forty-nine new initiatives.
• Merged departments and service points; switched to demand-driven acquisitions; eliminated subject-specific collection development practices; and arranged librarian responsibilities by discipline rather than function.
• Created many new programs (see Stages 6 and 7 for complete list).
**Consultants**

- An outside consultant was retained to help build trust among leadership team.

**Western Michigan**

**Data Sources and Readings**

- Staff surveyed at the end of the change process.

**Activities**

- New dean interviewed each staff member in the organization using the questions in the Garrison and Nutefall reading.
- Held library-wide strategic planning retreat and identified five major themes.
- Formed two teams, one to create the strategic plan and one to reorganize.
- Conducted process maps.
- Stopped outdated services such as copy center.
- Adopted and implemented new organizational structure.
- Dean met with individuals and gave new departments four months to define work and identify needed talents and skills.
- Adjusted positions descriptions and hired new staff.
- Formed new libraries council.
- Hosted a Library Management Skills Institute for new leaders.
- Surveyed staff to see how the changes were going for them.
Other


Culture Change

**Florida State University**

Data Sources and Readings

- Conducted a SWOT (strengths, weaknesses, opportunities, and threats) analysis

Frameworks

- Balanced Scorecard
- Open Science Framework

Activities

- Developed six strategies to address research and learning needs of STEM scholars.
- Merged building, circulation, and access management of two of the libraries with another.
- Created new service model.
- Changed organizational structure.
- Changed position descriptions.
- Filled vacant positions.

Other


Northern Arizona University

Data Sources and Readings

- Used demographic data to develop personas.
- Data through conducting usability studies.
- Data from users through feedback loops such as whiteboard feedback.

Frameworks


**Activities**

• Created personas to get a better understanding of primary user groups and their needs.
• Conducted usability studies.
• Redesigned website.
• Gathered feedback with whiteboards.
• Did library mapping exercises of library spaces with users.
• Conducted focus groups.
• Subdivided working group into two: UX-Spaces and UX-Web.

**Tools and Technology**

• Microsoft SharePoint
• A ticketing system for staff to report problems

**Rice University**

**Data Sources and Readings**

• Data from secret shopper activity

**Frameworks**


**Activities**

• Organizational and Development Manager visited the library and conducted a “secret shopper” activity.
• Explored existing programs, reviewed literature, created user personas, reviewed customer service videos.
• Piloted customer training program with library administration first before conducting it with staff.

Consultants

• Rice University. Human Resources. Organizational and Development Manager.

University of Manitoba

Data Sources and Readings


Activities

• Reviewed staffing and service models across U15 libraries in Canada and wrote a staffing proposal.
• Implemented a tiered service model that resulted in longer hours of operation but fewer hours of staffed time at service points. Piloted with three libraries and then implemented with remaining eight units.
• Developed a communication plan.
• Developed a “Working Alone Statement” policy.
• Successfully reclassed positions.
• Offered a two-day immersive retreat to refocus librarian model.
New Roles

**EARLHAM COLLEGE**

**Data Sources and Readings**

- Earlham College student retention data, 2006–2012.

**Frameworks**


**Activities**

- Worked with campus marketing and communications to promote the LIFT program.
- Collaborated with alumni mentors to work with LIFT students.
- Adjusted curriculum each semester.
- Planned an experience abroad.

**Other**


**UNIVERSITY OF FLORIDA**

**Data Sources and Readings**

- See references to related research published by these authors within their story.
Activities

• Conducted orientations for interns.
• Implemented curriculum vitae and résumé workshops for graduate interns.

Other


University of Maryland

Data Sources and Readings

• See a brief review of the literature that informed the change initiative located in Stage 1 of the change story.
• The Library Liaison Task Force examined national trends, emerging literature, and models in place at peer institutions in addition to internal documents and data related to liaison activities.
• The Research Commons Task Force examined national trends, emerging literature, and models in place at peer institutions. They also conducted interviews with stakeholders and other institutions and administered an internal survey to UMD faculty and students.

Activities

• The task forces communicated with standing committees, other task forces, public forums, and email lists. They also held numerous one-on-one conversations, visits to units, and open-door policies.

Other

• The UMD Libraries created a “Meet Your Subject Specialist” webpage, with a link to a Google Scholar Profile for each librarian. This webpage also includes anonymous kudos for librarians. Available at https://www.lib.umd.edu/rc/meet-your-librarian.
WEST VIRGINIA UNIVERSITY

Data Sources and Readings

- Survey data of WVU student veterans’ needs and interests and an analysis of its results.

Frameworks


Activities

- Created the Veteran Study Room in the library, which involved remodeling and updates.
- Applied for and was awarded an IMLS SPARKS! grant.
- Identified and enlisted three student veterans (one fellow and two employees) to work on promotion.
- Created a dedicated webpage for program.
- Hired outside firm to produce orientation videos.
- Hosted open houses.
- Hosted a campus visit from Sarah LeMire, a scholar-librarian from Texas A&M University. She delivered one program for the Campus Veterans Advocates group and another program for the WVU Library Leadership Team.

Tools and Technology

- Atlassian’s Confluence

Other

- West Virginia University Libraries. Services for Student Veterans website. https://lib.wvu.edu/services/veterans/.
Technological Change

**Stephen F. Austin State University**

**Activities**

- Customized presentations to individual departments with consistent messaging.

**Tools and Technology**

- Bepress Digital Commons (IR platform)

**Other**

- Stephen F. Austin State University. ScholarWorks website. https://scholarworks.sfasu.edu/

**University of Alabama at Birmingham**

**Data Sources and Readings**

- University of Alabama at Birmingham Libraries strategic plan
- Data from SWOT analysis with staff and other data gathered through environmental scan.

**Activities**

- Conducted a SWOT Analysis.
- Held town hall–style all-staff meetings.
- Administered Library Services Survey—needs and wants of each library department.
- Reviewed peer and aspirational websites.
- Used data from previous usability studies.

**Consultants**

- University of Alabama at Birmingham Digital Media, the university’s web design unit. Library administration outsourced development and maintenance.

**Other**

- The UAB Libraries website was launched on 28 September 28, 2017, at https://www.library.uab.edu.
**University of Virginia**

*Data Sources and Readings*
- Conducted an environmental scan of program characteristics at other institutions.

*Frameworks*

*Activities*
- Piloted new workflow with two digitization projects.

*Tools and Technology*
- Atlassian Confluence (team collaboration software)
- Atlassian. Jira (a ticketing system; issue- and project-tracking system)

**Vanderbilt University**

*Data Sources and Readings*
- Conducted an internal survey with staff.
- Analyzed data from Google Analytics on usage of past communication tool.

*Tools and Technology*
- WordPress platform and customizations
  - Suri theme for the main site with a custom child theme for sub pages
  - Single Sign-On (SSO)
  - User Submitted Posts (post submission plug-in)
  - Mail Poet (email plug-in)
- Tools the team investigated but did not adopt
  - Shared Outlook calendar
  - Microsoft Office 365 Planner/Microsoft Teams
  - Basecamp
  - Goodbits
  - Emma
  - Mailchimp
  - Springshare Calendar
  - Slack
  - Bedework
  - VU Campus Calendar
  - Microsoft SharePoint