Dream, Design & Deliver:

Brock University Library’s Organizational Blueprinting Process

OLA Super Conference
January 31st, 2020
The story of one institution's approach to organizational change...

1. What is the Blueprint?
2. Framing the Process
3. Digging in with Appreciative Inquiry
4. Where do we go from here?: Organizational design after Blueprint…
5. Things we learned!
What is the Blueprint?

• A compelling change vision for the Library that is aligned with the Library’s strategic plan and the University’s strategic plan

• Organizational principles that can be used to derive:
  – Service models
  – Structures
  – Key processes

• What a Blueprint is not:
  – Not an organization chart
  – Not a description of jobs
  – Not a space plan

• Blueprint as a metaphor

• Deliverables: report with change vision + recommendations
The Organizational Design Process

- Project Blueprint: Nov 2018 - July 2019
- Organizational Drafting: July – Oct 2019
- Consultation: Jan – March 2020
- Refinement: March – May 2020
- Implementation: May 2020 -
The Blueprint

Student Success

Research Lifecycle

Innovation Lifecycle

Content & Discovery

Knowledge Mobilization & Research

Digital Education & Learner Engagement

Library Stewardship & Infrastructure

Community Engagement

Strategic Lifecycle

Strengthening Our Capacity

Users, Partners, Stakeholders

Fluencies, Action-ready, Enriched
The Impetus for the Blueprint

• External review (2015)
  “That a process to reassess the organizational structure be launched, including the reporting structure, levels of resourcing, supervision and management.”

• Alignment with strategic planning (2018)

• Structural issues to be addressed
  – New programs & services
  – Cross-appointments
  – Questions about: IT, liaison model, etc.

• Longstanding desire for change

• Need to review cross-org structures
Getting Started
Considerations for Process

§ An engaging process
§ Importance of gaining trust
§ Respects contracts and the role of unions
§ Takes a positive approach to change that is rooted in strengths
§ Process should not convey that the Library is broken - because it is not
§ Does not exhaust staff with process
§ Fosters empathy
  ▪ ~75-80% of people feel that the project
    ▪ has been productive and accomplished its purpose
    ▪ was successful with few individuals who have issues with results
§ Manages expectations very carefully
§ Uses lots of communication
How: Framing the Experience

How we started:

1. Hire consultant/RFP
2. Project Charter
3. Kick-off meeting with all staff
4. Convened project team

Rebecca Jones
Dysart & Jones Associates
Commitment to an Open Process

- Transparency
- Communication (variety of methods)
- Encourage engagement
- Maintain ongoing dialogue
- Full staff participation
Communication

- Email updates
- Sakai (learning management system)
  - Forums
  - Key documents
- 3 All staff meetings
  1. Kick-off
  2. Dream Workshop
  3. Presenting the Blueprint
- Feedback
  - Qualtrics anonymous form
  - Anonymous hard copy message option
- 92 Appreciative Inquiry interviews
- Drop-in conversations
- Video messages
Appreciative Inquiry

Asset Based

Look at what we've got!!

Look at what we're missing!!

Deficit Focused

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How: Project Phases

Discover

Dream

Destiny

Design
Discover

What were our goals for the Discover phase?

Identify Factors for Success (internal)

- Focus on the *Positive Core* of the Library
- Identify the best of "What Is" about the current structure, with its processes & strengths

Learn from Others (external)

- What others have learned/are learning
Engage Library Staff

- Late 2018
  - Workshop Questions

- Early 2019
  - 14 groups
  - 92 Appreciative Interviews
  - Responses analyzed into themes
  - These led us to...
Discover

Factors for Strategy Success

• To ensure that all staff voices could be heard, interviews were conducted with 14 different groups in the Library, each representing a distinct program or service area.

• These are the factors that form positive core of the library today.

• Factors vary from organization to organization.

• The Blueprint carefully considers how to incorporate and continue to nurture these factors in the future organization.
Discover - Identify Factors for Success

A time in your organization that you consider a high-point experience, when you were most engaged and connected. What was that like? What were the conditions that allowed that to happen?

Without being modest, what do you most value about yourself, your work, and your organization?

What current strengths will enable the Library to implement its strategies?

Describe experiences that demonstrate how the University values the Library.
Factors for Strategy Success

Brock’s Positive Core

- Expertise
- Impact
- Creative and Trusted
- Meaningful
- Visible and Valued
- Teamwork
- Direct student interaction
- Project work
- Passion
Discover - Learn from Others

Where did we go to discover?

• Other University Libraries
  – Interviews via video chat/phone call
  – 6 institutions interviewed

• Literature Review
  – Organizational Structure of other Institutions
  – Aligning University goals with Library goals
Wrapping Discover up...

- Interviews, publications, and data compiled and presented to staff
- Now that we had an idea of where we and others currently are;

We looked to the future!
Dream
Imagine what your organization needs…
Let's dream and discover how things could be…
How can we best realize our strategic directions?

• designed an all-staff 3-hour workshop using appreciative inquiry themes, led by facilitating team members, utilized 10 creative and engaging activities

• activities included an eclectic mix of small group discussion, personal reflection, partnering, sharing, one-on-one conversations and coffee

• where pictures, stories and data were captured for further analysis…
Library Dream Workshop

Activities included:

• together, as a group, draw an image of what our library looks like in 2025
• document, what are no longer problems in 2025, that are current problems
• partner up, and describe your dream organization with each other
• complete the sentence, "By 2025 my library will…"
• write down an issue that you feel needs to be addressed and place it in the "Changing this will have a positive impact" bag
Dream

A library-wide Appreciative Inquiry dream workshop

• builds on positive core outcomes
• envisions a future where staff dream about what they really want
• grounded in personal experience, explores strengths, identifies gaps, and reinforces personal and collective peak performances
• engages everyone, collects rich data, documents possible outcomes
• is critically important to the Design Phase and next steps
• can be fun for everyone!
Design
Design
Design
Design

Lifecycle Organic

Unique Context

Workshops

Knowledge

Collaboration

Mobilization

Knowledge

Delivery

Discovery

Dream

Destiny

Design
Design

[Diagram with nodes and connections labeled as 'Mission', 'Strategies', and 'Shared decision-making']
Design

- With these metaphorical and representative designs...
- And aligning with Library services, processes, and university goals...

We had developed our...
Blueprint
The Blueprint

Digital Education & Learner Engagement

- Learning Through the Curriculum
- Learning Alongside the Curriculum
The Blueprint

Knowledge Mobilization & Research

Knowledge Mobilization (products)
Research Processes (methods)
The Blueprint

Content & Discovery

Outside-In Collections

Inside-Out Collections
Library Stewardship & Infrastructure

Library Leadership Team

Library Technology Services
Blueprint Recommendations

1. Approve *Blueprint*
2. Approve *Organizational Principles*
3. Communicate Blueprint with all staff
4. Consult University senior administration
5. Conversations with contractual bodies
6. Implement incrementally
7. Build a plan for implementing the strategic plan
8. Consult students and faculty regarding service delivery models
9. Convene cross-organizational teams
What has Happened Since?

- Project Blueprint
- Organizational Drafting
  - July – Oct 2019
- Consultation
- Refinement
- Implementation
The purpose of the Blueprint process (November 2018 - June 2019) was to develop a compelling and high-level change vision for the Library. While it was not within the project’s scope to deliver an organization chart, the goal has always been to use the Blueprint as the foundation for organizational structures that would be developed subsequently.

We are now at a juncture where we can begin to define (and refine) organizational structures. The Draft Organizational Design has been created by the Library Admin Team, following closely on the vision contained in the Blueprint. The next phase of the process involves working groups taking up this proposed structure and testing it, fleshing it out, and exploring its shape. To keep with our original metaphor, if the first phase was blue printing, then this is where we begin to frame and rough-in the building.

The process described here is intentionally iterative. The theme of recursive iteration appears through the Blueprint final report. In our Organizational Principles, we talk about being “a learning organization”, and we state that “being an innovative leader in advancing knowledge and inspiring discovery demands flexibility, frequently calibrating our binoculars... and refining our structure to continue our progress” (p. 20). Similarly, one of the recommendations (#6) is that we proceed incrementally (p. 22).
### Organizational Structure

<table>
<thead>
<tr>
<th>Before</th>
<th>After</th>
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</thead>
<tbody>
<tr>
<td>Liaison Services</td>
<td>Instructional Strategies</td>
</tr>
<tr>
<td>Access Services</td>
<td>Learner Services &amp; Engagement</td>
</tr>
<tr>
<td>Map, Data, GIS / Dig Schol Lab</td>
<td>Research Lifecycle</td>
</tr>
<tr>
<td>Collections Services</td>
<td>Collections Services</td>
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<tr>
<td>Archives &amp; Special Collections</td>
<td>Archives &amp; Special Collections</td>
</tr>
<tr>
<td>Systems &amp; Technologies</td>
<td>Library Technology Services</td>
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Structural Principles

Principles informing structure
- Structure is based on strategy, not disciplines
- A more centralized approach to collections
- Service points ≠ Structure

Principles informing roles
- Assess cross-appointments
- Mix of professional/support staff
- Minimize single points of failure
Consultation Phase

Project Blueprint → Organizational Drafting → Consultation → Refinement → Implementation

Consultation: Jan – March 2020
Consultations: Roughing in the Structure

• Purpose: to test, explore, and elaborate upon proposed departmental structures

• Working Groups
  • One WG for each proposed unit
  • Plus one WG to tackle issue of disciplinary matrix

• Reports will address the following:
  • Services & Service Models
  • Cross-organizational Relationships & Dependencies
  • Required Skills & Competencies
  • Technological Requirements
  • Other Insights or Recommendations
Refinement

Project Blueprint → Organizational Drafting → Consultation → Refinement
  March – May 2020 → Implementation

We are here!
Destiny

FUTURE
The journey was just as important as the outcome

• Take the time needed to be inclusive, transparent, and appreciative
• Collaboration is the default - people together make things happen
• Building trust is essential to success
• People like to be thanked, appreciated; celebrate and share success
• Our Library is farther ahead, less risk adverse, and more prepared for change than we thought
Things We Learned

There will be struggles but they can be overcome

- Stick to the appreciative inquiry process
- Be the change you want to see in others
- Foster and maintain a positive culture that embraces change
- There's no magic sauce that makes this happen
Things We Learned

Staff

• Showed up, participated, took risks, contributed...
• Shared, laid a foundation for future success
• Learned that change comes incrementally and is not always easy
• Discovered that change never ends, it becomes part of our new fabric
Things We Learned

Appreciative Inquiry as a process works!
Dramatis Personae

Blueprint Project Team Members (l to r)

- Mark Robertson
- Tim Ribaric
- Laurie Morrison
- Dylan Pineo
- Ian D. Gordon
- Monica Rettig
- Alicia Floyd
- Edie Williams
- Tanya Sicoli

Facilitator: Rebecca Jones, Dysart & Jones Associates
Thank you!