

September 12, 2002

MEMORANDUM

TO: CMSC/PSD SUBJECT TEAMS AND PROGRAM TEAMS

FR: CHARLES B. LOWRY, PH.D.
DEAN OF LIBRARIES

RE: "TAKING STOCK" REPORT

During the past year we have put a great deal of effort into the "taking stock" process. The fact-finding work is complete and this assessment report responds to the key findings of our effort. I want to distribute it now because it is so vital. I am doing so in spite of the fact that I will be out of the country for two weeks. I gave some thought to delaying distribution until my return, but concluded that you have been patiently waiting for the report and there was no need to delay further. Of course, this means that the proposed meetings for discussion cannot occur immediately. I encourage you to spend some time with the report—think about it and prepare to discuss it. I am sure that there will be different interpretations based on personal perspectives, but we will soon sort through these and clarify as needed. In my absence, I am asking Sue to arrange times when we can have two sessions that may allow everyone to discuss the report with the C-Team members who have all had ample opportunity for comment.

Since the establishment of the subject teams in 1998, the University of Maryland Libraries (UML) has expanded its team-based organization as a vital organizational ethos. Like any such "deep change," this has been accompanied by challenges and we have learned as we have progressed. As a team-based learning organization, we must periodically revisit organizational decisions with an eye to continuous improvement. During the 2001-2002 academic year, Sue Baughman and I spent a great deal of time meeting with various groups and individuals in PSD/CMSCD to take stock of the condition of our team organization. These interviews focused on the subject and program teams and their interactions with one another, particularly with the branch libraries. As might be expected in a series of interviews with such a large number of staff, the comments were not always consistent, nor were the assessments of what should be "fixed." Nonetheless, we came away from those meetings with a significant amount of commentary and information. We found much to be satisfied about. We also learned a great deal about what was not working well and heard well-reasoned perspectives on corrective measures to improve core relationships within the teams.

Much time has elapsed since our interviews, which we have spent digesting what we heard and have had lengthy discussions in the C-Team. Some of the issues and problems identified during our meetings are weighty and defy simple and quick solutions. What follows is a summary of what we believe to be the major issues or themes and the appropriate adjustments and clarifications that will support improvement in the interrelationships in the team structure. As we continue to develop our organization, it is important that all the affected teams consider this assessment closely and incorporate its findings into team discussions, planning and practice. It is also important that we maintain open and continuous communications to ensure that issues are surfaced and that we work together towards improvements.

Team Roles and Responsibilities

There is one critical element in our team structure that is a strength—that the authority of any team is circumscribed. However, this strength continues to lead to some discomfort. In short, there is ambiguity, but this is the nature of team-based organizations and we have training to help. One of the consistent concerns expressed in the interviews was the need to clarify how individuals should “act” within a team-based organization—what they should do and what is expected of them. In other words, there is a need to define the roles the various teams play and who is responsible for which components of the work. For example, collection development, reference and instruction are functions that are shared by individuals across teams. Branches are program teams and play a key role in the delivery of the core services. Some subject librarians have multiple roles in the branches, on other program teams and on the subject teams and this should be used as a way of mutually strengthening the performance of all three. These teams are interconnected and have overlapping jurisdictions, members overlapping roles and no team or individual has independence to make decisions without considering whatever boundaries there may be. Discussion of the interconnectedness and overlapping boundaries cannot happen in a vacuum. Two attached appendices are recent articulations that provide a potential framework—“Team Leader Roles and Responsibilities” and “Team Member Roles and Responsibilities.” Teams in all divisions are encouraged to use these as a template for developing their own “Roles and Responsibilities.”

Representation

It is important to underscore the responsibilities of team members who serve as “representatives” to other teams (e.g., subject team members on CMT, ILT, or IRST). Representation is a broadly defined role and should not be construed narrowly to reflect the interests, concerns, and work of one team over another. The expectation is that all team members will be fully engaged in the multi-faceted work of all teams on which they serve in order to address the mission of the UM Libraries. There are occasions when representation is important, but this does not define the nature of team membership in any exclusive sense.

Interpersonal Dynamics

Many of the obstacles to team development that we heard about deal with interpersonal dynamics. These cannot be dealt with by further reorganization. In the final analysis, it remains the responsibility of the team members collectively to deal with any fundamental problems and seek support through training, the Learning Curriculum, and the Facilitators Team.

Mission Statements and Workplans

In some measure the teams have gradually defined their mission, but it is essential that they create clear mission statements and develop annual team workplans that will guide annual activities. These should be public documents. This applies equally to subject teams and program teams, including branch libraries. Responsibility for leading the teams in developing these documents falls to team leaders, but is the job of all team members. Workplans of all teams need common elements and interconnections. For example, branch program team leaders should work in tandem with subject team leaders, as well as the team members who are assigned to the branch, when developing a branch workplan. Similarly, subject team workplans must reflect the needs of the service points where their members have public contact—branches and McKeldin.

Workload

Workload factors for individual Library Faculty on the subject and program teams should reflect some balance, which is not to say they should be the same. All teams need to persist in a frank and open examination of their collective and individual work, especially how this work gets defined and distributed as workload. We should consider this in the context of the quality service provided the constituencies of each of the teams. For example, subject teams are the place to take up questions of reference contact hours and distribution of individual subject liaison assignments to be sure that these are reasonably balanced. Subject teams have already helped with specific challenges like vacant positions in branch libraries, and this strategy should become commonplace. All of these are simply strategies for shared work.

Process and Support

There is some concern that teams get bogged down in process. This will be allayed in part by clear mission and workplan definition. However, it is also likely that there will be a need to ensure that the teams are working effectively. There is plenty of support in the Libraries to do that—the Facilitator’s Team, Assistant Dean for Organizational Development and the Staff Learning and Development Office. When effective team performance is getting bogged down, these resources should be utilized. If it is clear that a team needs to train in process, this should be undertaken vigorously. However, process should not be the routine agenda of any team for its own sake.

Team Size

There is a concern that some of the teams are too big and consequently unwieldy in conducting effective business. It should be noted that an “ideal” size is often difficult to achieve in practice. What is more critical to team success, however, are the elements of defining purpose, specific performance goals, complementary skills, and mutual accountability. Teams concerned with the number of members may need to explore ways to manage agendas effectively and assign work to sub-teams, individuals, or “temporary teams.”

Formal Team Leaders Appointment

Issues around selection and terms of team leaders are no longer relevant as a result of the establishment of faculty status for those librarians in formal leadership positions. Terms of appointment and methods of review as academic administrators are now required by University policy. This practice will clarify the matter considerably and is currently being developed by the

Performance Review Task Force for review and acceptance by the Library Faculty Assembly in fall of 2002. This practice will affect both subject and program team leaders.

Performance Evaluation

It has been a key concern that subject team leaders do not have the opportunity to observe the performance of team members with any regularity due to the fact that much takes place in the branches. We have tinkered with the notion of “secondary reviewers.” Now the Library Faculty peer review process has supplanted the PRD process and offers a solution. All librarians with branch assignments will have both the subject team leader and the branch program leader on the Peer Review Committee to provide guidance in goal setting and information about their contribution in the branch context to reference, instruction and collection development. This should close the gap between the need for both types of formal leaders to provide guidance.

Senior Management Roles and Reporting

Leadership is a primary role for all of the directors. The “taking stock” discussions surfaced comments from both team members and team leaders about the demands placed on them in responding to the joint reporting structure that has emerged. The primary focus of those concerns was the challenge of balancing sufficient time to spend with each team leader/branch head to provide them administrative support. Among the consequences was insufficient time to work directly with various team leaders to clarify distinction in roles within the team structure on various functions—reference, instruction and collection management as well as program team functions. We do not wish to propose an immediate solution to the questions raised in our review. We will begin discussions within the C-Team to work towards a response. We will also extend an opportunity to interested parties (teams, branches, etc.) to broadly explore solutions.

Conclusion

The continued development of our team organization does not happen automatically. This is hard work for all of us. The taking stock discussions have demonstrated the importance of ongoing dialog between teams, directors and the Dean. We believe that ultimately the teams have improved their abilities to self-manage and to respond productively and creatively to issues and problems associated with their work. But, as emphasized in *Working Paper #1*, continuous change is a fact of life in the modern library. We will continue to provide the support for adaptive change and have the right dialog to make to sure that it happens.

Sue and I thank all of you who met with us and shared your comments and concerns. Your feedback is both appreciated and critical to the process. We plan to have meetings with all the immediate stakeholders about the findings and the results in the near future. We will follow this with a forum for all interested staff.

c: C-TEAM

APPENDIX I

Team Leader Roles and Responsibilities

- Serve as the team's representative on leadership groups requiring Team Leader participation
- Act as primary contact person for the team
- Coordinate and submit team reports, such as annual reports and team plan, and other necessary documentation required from the team
- Serve ex-officio on search committees for vacant team positions
- Participate on peer review committees for all team members and coordinate merit review process for team members
- Participate as a member of the team with instruction, reference, and collection management responsibilities
- Foster team and individual growth through coaching, mentoring, and serve as a resource person and by encouraging collaboration among team members
- Articulate and promote the team's work

Qualifications/Characteristics of Team Leaders:

Leadership

- Ability to inspire and carry out team vision and mission
- Record of distinguished leadership, e.g., examples of modeling standards of excellence, recognizing and acknowledging contributions of others, celebrating team accomplishments
- Responsibility
- Dependability

Facilitation/Communication

- Ability to apply various tools for group problem-solving and team development
- Good communication skills

Self-Managed Team Commitment/Experience

- Commitment to team growth/ability to create and foster a collaborative environment
- Willingness to participate as a team member
- Willingness to act on team decisions
- Prior experience as a team member and ability to model what is expected of others

Change/Risk

- Ability to be flexible and adaptable in an evolving environment
- Proven ability to balance a changing workload
- Willingness to innovate, experiment, and take risks

Advocacy

- Ability to articulate and promote the team's work
- Ability to be an effective advocate for the team by advancing the team's initiatives, goals, and values
- Advocate for needs of internal and external customers

Librarianship

- Demonstrated experience in the core work of the team
- Full-time faculty member

Adapted from Team Leader Position for the Self-Managed Social Sciences and Allied Professions Team, Science and Technology Team Leader Tasks (3/19/02), and The Wisdom of Teams

APPENDIX II

Team Member Roles and Responsibilities

- Fulfill core job responsibilities of instruction, reference, and collection management
- Support an environment of mutual respect, collegiality, and shared responsibility
- Participate actively in team planning and decision-making

Qualifications/Characteristics of Team Members

Leadership

- Generate plans and ideas for new services
- Accept change as warranted by the team or organization

Facilitation/Communication/Participation

- Keep team informed of relevant actions and decisions that may affect the work of the team
- Give and receive feedback
- Encourage discussions and fact-based decision-making
- Participate in team meetings by asking for clarification and questioning assumptions

Collegiality

- Provide mentoring to one another to support strengths and weaknesses.
- Contribute to team's shared responsibility for general instruction and reference service
- Share expertise
- Participate actively in meeting the goals and objectives of the team plan

Adapted from Science/Technology Team *Team Expectations* document (October 2001)