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Transitioning the Organization:  
A View from the Inside

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Transitioning the Organization:  
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Several colleges and universities are in the process of integrating their information resource providers by merging computing services and the library. There are a number of reasons why an institution may wish to pursue this strategy. These include the similar nature of the provision of information by each organization and how many futurist predict that more and more of the information that is provided on paper will be provided digitally in the future.

Almost two years ago, Gettysburg College announced plans to create a new division of Information Resources (IR) comprised of computing services and the library. To facilitate the merger, IR pursued a strategy-driven reengineering effort. The result of this seven-month task was a single organization comprised of six self-directed process-oriented teams. The teams represent a melding of the two organizations. Each team is comprised of staff from both organizations. The new IR division is responsible for the delivery of all computing and library services on campus, including telecommunications and media.

The transition process to the new organization has been underway for close to two years and is still very much work in progress. In this presentation, we will describe the transition process. We will describe some of our successes and some of the pitfalls we have encountered. We also will attempt to forecast some of the upcoming turns in the road.

Where We Came From

To give you a thumbnail of the environment, Gettysburg College is a private, liberal arts college in south central Pennsylvania, approximately 80 miles north of Washington DC and about 60 miles from Baltimore, MD. Our enrollment is approximately 2,200 undergraduates. We are loosely affiliated with the Lutheran church. We will be 165 years old next year.

President Gordon Haaland and Provost Baird Tipson announced the decision to merge the computing and library organizations in December 1993. Provost Tipson described the reasons for the merger as the need for a flexible, streamlined organization to support use of resources in all formats, an organization well positioned to lead the campus community in new and innovative methods of using information technology.

In December of 1993, there were approximately 28 full time library employees supporting access to a collection of 400,000 volumes and 1,400 serials subscriptions. The organizational structure was a traditional, hierarchical one. In technical services, for example, there were 4 layers of reporting plus a layer of student workers effectively making a fifth layer. Many employees had been in place for a number of
years. There was a history of faculty complaints regarding lag time between request for a book to be purchased for the library collection and availability of that book within the collection.

In the computing organization in the fall of 1993, approximately sixteen individuals supported both administrative and academic computing needs on campus. About four years before the merger of computing and the library, the computing organization had been reorganized to merge academic and administrative computing. In addition to faculty and staff, there was a heavy demand for services from students. Every residence hall room had at least one ethernet connection per bed.

The computing organization was swamped by user requests. This organization had been in flux for some time. There was a tradition of individuals holding loosely defined positions where they were expected to fill several roles. For example, the bookkeeper running the computer store also gave training sessions on basic computer skills for first year students. Prior to the merger, the computing organization had a series of training sessions on TQM methodology and team dynamics. Both served them well as a foundation for this new organization.

The Reengineering Process

The reengineering effort was a top-down, strategy-driven effort. It attempted to simultaneously address people, organization, process, and technology. To facilitate the reengineering effort, Axiom, Inc., an international consulting firm, was hired. The analysis and planning for the new organization was conducted by a core team comprised of three IR staff, an Axiom consultant, and the vice-president of the new division, Dennis Aebersold. The authors of this paper were members of the core team.

To ensure communication and a steady flow of ideas between the central team and the rest of the organization, the core team met with an extended core team comprised of six to eight staff members several times a week. During these meetings, the core team would describe current issues and ask for input. The extended team provided an immediate response. Following the meetings with the core team, members of the extended team would hold meetings with other members of the IR division over lunch to discuss progress and solicit input. This information was provided to the core team for consideration.

One or two times a month, the entire division would meet to discuss the reorganization. The topics of these meeting ranged from the wording of the mission statement to identification of activities performed by the organization.

As part of the analysis and design of the new organization, the core team conducted an environmental analysis of the division and the college to identify constraints and boundaries that could influence decision future decision making.
The core team also developed a mission statement that was agreed to by all members of the new division. The mission statement communicates the purpose and intent of the division to all stakeholders in the college.\textsuperscript{1} A value statement was also developed.\textsuperscript{2} These two statements provided a context for subsequent decision making by the project team. They were also used to build the new organization by conveying purpose and identity to motivate employees. These two statements were also a key component for developing the six self-directed work teams. In addition they serve as a guide in daily decision making.

With input from the entire division, a set of goals and enduring objectives were developed. These goals were based upon the mission of the new organization. After developing the goals, a set of measures was developed. The measures were to enable the organization to evaluate its performance against targets.

An employee opinion survey and a cultural assessment were undertaken to identify the strengths and weaknesses in the organization. The assessment also identified priorities and preferences for working conditions within the division. The assessment posed questions about the prevailing culture of the library and computing services organizations. The assessment sought information concerning what changes staff would like to see in the future.

The needs and values of the division’s stakeholders were evaluated also. Stakeholders are defined as individuals and groups--both internal and external--who have a stake in the success of the division or who are affected by its actions. Stakeholders include faculty, students, staff, alumni, as well as residents of Gettysburg.

One charge to the core team was to innovate operations of the new division. To do this, rough-cut activity models were developed to illustrate how operations were being conducted. Clear and logical models of the major cycles of the organization--such as the beginning of the academic year or how an information resource was obtained--were subsequently developed. These cycle models represent the sequence of activities that need to be performed to achieve strategies. The models map what happens from the trigger that kicks off the cycle through the activities required for successful completion.

Organizational structure models were developed that would best support the

\textsuperscript{1} The mission statement is: The Information Resources division develops and provides information services and resources needed for the learning environment at Gettysburg College.

\textsuperscript{2} The value statement is: The division fosters an atmosphere of open inquiry and continuous education for all members. This demands highly qualified, flexible and team-oriented members committed to excellence and the value of the educational experience.
activity and cycle models. The results of the cultural assessment were reviewed in light of generally accepted management paradigms to provide ideas for the structure of the new organization. An array of structures, ranging from a hierarchical model to a form of a matrix management to the present team-based framework, was considered. The cycle models were reviewed to determine logical units of work. This analysis, along with the organizing criteria, became the starting point for preparing and developing the organizational structure. The core team decided to adopt a team-based strategy for the new organization. The teams were to be self-directed and organized around specific processes. The teams reflected the six groupings of activities and cycles: training, selection, delivery, response, planning, and special projects. The organization could also create special projects teams that would exist as virtual teams and would be responsible for specific projects that generally fell outside the scope of the other six teams.

The roles, responsibilities, and skills that are needed to enable the new organizational structure also were considered. The members of teams require specific knowledge, skills, abilities, and personal characteristics (KSAPs). These KSAPs were identified and documented. In constructing the teams, attempts were made to match individual KSAPs with team needs.

The core team also created a measurement system based on the goals and the activity and cycle models. This measurement system was designed to allow self-correcting feedback to the organization so that it could pursue its strategic direction.

The core team developed a change management plan to direct and manage efforts to bring the new division to fruition. The transition was managed by a two-person transition team. The transition team was responsible for establishing the six self-directed work teams and fostering their development. The transition team was also responsible for providing training and obtaining resources that would be needed by the new organization during its early development phase. The transition team was the organization’s first special projects team.
Transition Process: A Staged Process

We chose to implement the new organization as a staged process for a number of reasons. A key reason was practicality. We wanted to ensure success. We wanted to make sure we had sufficient resources available to address any unforeseen problems. We brought up the initial set of three new teams in January of 1995 and the second set of three teams in June 1995. We also wanted to minimize any disruption of services. As part of the transition, we were operating two separate organizations.

During the initial stages of all the teams' implementation, a great deal of time was spent in meetings. The transition team met with each team twice a week. The teams met among themselves several times a week to sort out which activities were appropriate for the new team. Some individuals needed to shed activities that belonged with a different team. The teams needed to establish new ways of organizing work and new ways of interacting with co-workers. One individual made the statement that it felt as if she was involved in a marriage with eight people in it.

The transition team's role in meetings with the teams was to provide a forum for safe conversations. The meetings began with a state agenda. The transition team frequently adjusted the agenda to address immediate concerns as they emerged. Teams would sometimes suggest agenda items for inclusion.

The design of the meetings included a warm up activity. The topic of these warm up activities were drawn from *The Team Handbook* by Peter R. Scholtes, et. al. (1988). These warm up activities included such things as having each person talk about what they liked to do on weekends or talk about some aspect of their home town. Even though we thought these topics were not threatening, we found over time some individuals objected to them. In one instance, a member of one team became very upset and burst into tears about having to talk about that member’s home town. In other instances, team members welcomed the opportunity to share at length moments about their early years.

Occasionally, the warm ups would last for more than half the time allotted for the team meetings. We found these sessions to be extremely useful as members of the team began to recognize their team mates as warm and caring individuals. The warm up activities were very successful especially with the larger teams who had not worked together very much before the merger. After the formal transition period was over, several individuals said that the most beneficial aspects had been the warm ups and the ability to shift focus from a planned agenda to address immediate concerns.

Following the warm up sessions, we discussed much of the aspects of the business process renewal project described above. These included a review of the mission and values statements, the objectives and goals of the organization, and activities related to the particular team. We also talked about team dynamics such as communication, ground rules, decision making, etc.
After these initial topics were covered with the teams, the transition team tried to minimize its involvement with day-to-day activities of the new teams. Meetings with the teams were reduced to once per week. Subsequently the meetings were held every two weeks and the teams took shape. The topics of these later meetings usually focused on clarification of the team’s role. In a few instances, these meetings were used to nudge the developing teams back on a course.

Lessons we learned

We learned a large number of things in the course of this transition. We found the experience to be one that resulted in a great deal of personal growth. It was also an invaluable experience in the management of change.

For those of you who may start down this path, we offer the following suggestions:

• *Don’t allow individuals to be members of more than one team.* We had included some individuals on a short term basis on the initial teams, thinking we were temporarily over staffing them to help them get through the initial, difficult period. This was a failure--the short timers were not committed to the team, caused friction and interfered with the process.

• *Try to avoid hiring people as temporary members of teams.* We had a hiring freeze during the analysis process until we determined where the positions should go. We hired some people on a temporary basis which created some tensions. We are still filling those permanent positions. It is a pleasure to bring in new, enthusiastic, committed people. If at all possible, accelerating that process of identifying the needed skill sets and recruiting new people in with enthusiasm and without baggage would have been really helpful.

• *Resist the urge to fill every position as soon as it opens.* Wait until the teams are formed, then use the positions to acquire skills or abilities that may be missing from a team.

• *Take your time.* Be patient. There is no rush. It is more important to take the time needed to develop and nurture the teams than it is to declare victory.

• *Use outside consultants.* Do not hesitate to use whatever resources are necessary (and available) to bring in someone from the outside. Not only will the outsider provide a different insight, but they also will not carry baggage.

We also had a number of successes we’d like to offer, too:

• *Warm up activities.* The warm up session probably did the most to ensure the success of each team. As facilitators, you can acquire a wealth of information
about individuals about what they are saying; whether it is personal or not and how much they are willing to talk about it.

- **Use free flowing agendas.** Resist the temptation to cut agendas into stone. One technique that some teams use is to allocate a fixed amount of time to an agenda topic. As a result, the focus becomes completing the discussion within the amount of time devoted to it and not on resolving the issue.

- **Use meetings as sounding boards.** Allow the teams to experiment and challenge each other in the meetings. Encourage them to reflect on what they are doing at that moment, how they feel, and why. Gently encourage them to challenge their assumptions.