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A LIBRARY STAFF BECOMES A TEAM

By Judith M. Nixon

Abstract

The staff of the Management & Economics Library of the Krannert Graduate School of Management at Purdue University used group problem solving techniques developed by The Institute of Cultural Affairs (ICA to redesign the floor plan of the circulation, periodicals, and reference areas of the library to best utilize the space. The ToP^{tm} (Technology of Participation) planning process utilizes visualizing, brainstorming, and clustering of ideas. Its planning process consists of five workshops: mapping out the practical vision; analyzing the underlying contradictions; setting the strategic directions; designing the systematic action plan; and drawing up the implementation timeline. Each of these workshops is described in part one of this article. Part two describes the implementation of the changes and includes a list changes, their associated costs, and goals they accomplished. The appendix includes before and after floor plans

Key words: team building, Institute of Cultural Affairs (ICA), remodeling, strategic planning, goal setting

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A LIBRARY STAFF BECOMES A TEAM
Part I

Business librarians are very familiar with the literature of team building. We purchase books and journals on team building and teach students how to use electronic sources to find information on it. However, all too often we operate using management techniques from the past. Instead of applying team-building techniques, we form committees with representation from each area and expect the committee to produce a written report, which is then presented to the whole staff. Perhaps one idea here and there will be implemented. Frequently these reports are then filed, and little is accomplished. Naturally staff morale is low. All this happens while we have on our own shelves excellent material on how to break out of this syndrome and make the staff a team.

This article is about the use of group planning and problem solving techniques to remodel the main floor of The Management & Economics Library in the Krannert Graduate School of Management at Purdue University. The techniques we used, which build teams as well as help them accomplish complex tasks, were developed by the Institute of Cultural Affairs (ICA), an international organization which specializes in community and organizational development through the use of participatory techniques. Laura J. Spencer's book, *Winning through Participation* (Dubuque, Iowa, Kendall/Hunt, 1989) presents the ICA's Technology of Participation (ToP[tm]) methods. This approach provides facilitators with structured methods that enable groups to draw upon the contributions of all members, deal with large amounts of data in short periods of time, pool individual contributions, and build commitment. The methods have been applied successfully in a wide variety of situations such as strategic planning, customer service, and team building sessions.

The task before us, a staff of nine people including three librarians, was to redesign the floor plan of the circulation, periodicals, and reference areas of the library to best utilize the space. This was

a group of people who had never before worked on a long-term project together. Several members of the group were new to the library, and only one person had worked on a team. Our facilitator for the project was Nancy Hewison, Purdue's Planning Librarian, who had been trained by the Institute for Intercultural Affairs in ToP^{tm} methods. She suggested we utilize the ToP^{tm} planning process as outlined in *Winning Through Participation: Meeting the Challenge of Corporate Change with Technology of Participation* (Dubuque, Iowa: Kendall/Hunt, 1989) 95, which consists of five workshops:

1. Mapping out the *practical vision*
2. Analyzing the *underlying contradictions* or obstacles
3. Setting the *strategic directions*
4. Designing the *systematic actions* or action plan
5. Drawing up the *implementation timeline*

The entire staff participated in each of these workshops.

COMMON TECHNIQUES USED IN THE WORKSHOPS:

1. *Visualizing.* This technique starts with a hypothetical situation that is distant from the immediate problem facing the team, but which has characteristics similar to the one the team will face. For example, we started with the questions "What public places that you visit regularly 'work'?" By 'work' we meant are organized or laid out so that you can successfully get your business done efficiently. By visualizing and describing several places totally removed from our library and with different clientele and problems, we could identify hallmarks of successful public places much more quickly than we could have if we just asked the question "What are the things that make library layouts successful?" or "What things do we need to rearrange in our library?" Everyone could get involved in describing and analyzing why a local store is easy to shop at or why the state license bureau is a dreaded place to visit and very inefficient.

3

2. *Brainstorming.* Each member of the team develops ideas independently. This method is different than brainstorming techniques in other programs that ask the team to come up with ideas together. Ideas are written down individually, and everyone identifies his own best ideas, sharing them with the team by writing key phrases in large bold print on a 5-inch by 8-inch cards. One advantage of individual brainstorming is that more ideas are generated. A second advantage is that shy or quiet people are as active as the more vocal people are. A third advantage is that the ideas generated are not all influenced by the first ideas presented. A cardinal rule of this technique is that all ideas are welcomed, and no idea is either criticized or rejected. This generates both more ideas and a wide range of ideas on which to build.

3. *Clustering of ideas.* Once brainstorming is complete, the team reviews all ideas and clusters similar ideas together. The facilitator may begin grouping identical or similar ideas together in columns. He may ask the team if they see other similar ideas that can be added to a cluster. As clusters begin to form, the facilitator helps the team identify the common thread that ties ideas together in a cluster. Temporary titles are then given to the clusters. Finally the team reviews the chart and gives a permanent name to each cluster.

DESCRIPTIONS OF THE FIVE WORKSHOPS

Practical Vision Workshop

Our first workshop, the Practical Vision Workshop, focused on developing what we wanted to accomplish with the project. It began with the visualizing exercise described above, "What public places 'work' for you?" After identifying the hallmarks of successful public areas such as a local supermarket, we were ready to take the next step and establish our goals. We concentrated on the question, "What will our library look like three years from now?" This was actually another use of the technique of visualizing, this time using a time "other than the here and now." The facilitator asked us to imagine that a national business publication (such as *Business Week*) was featuring our newly remodeled library in an upcoming issue. We were to write a title for the article and imagine

the pictures the photographer would take. Specific sights and concrete images were sought. Each individual visualized images and then selected three. These were condensed into a phrase and written in bold letters on cards. The cards were then placed on the wall. The team then reviewed the images and put them into clusters of similar images. Then each cluster was named. This produced the following goals:

hospitable environment

focused distractions

transition areas

computer access and instruction

quality productivity

Under each of these goals was the list of the images that individuals had brainstormed. These goals were meaningful to the team, because they had been developed together. Everyone had had a part in the thinking, grouping and naming of them. By the end of the morning workshop the staff had designed the layout of the hypothetical article and picked a headline*: A Library for the 21st Century: What Partnerships and Innovation Can Accomplish*. The Practical Vision Workshop was a little slow starting and people were hesitant at first, but it ended up being enjoyable, inspiring, and productive. It led to results that we could build upon for our next step. It also taught the team the main techniques of the Technology of Participation:

visualizing

individual brainstorming, writing best ideas down and sharing with the team

clustering ideas and naming the clusters

Obstacles Workshop

The next workshop was called Obstacles; it analyzed the underlying contradictions and looked for what stood in the way of the realization of the vision. The question for this workshop was "What are the issues, obstacles, constraints, or barriers that could prevent our vision of the main floor from

becoming a reality?" We again used the above techniques: each person brainstormed obstacles; chose the three best; wrote them on cards; and sent the cards to the board. The team as a whole then clustered the ideas and named the clusters. Our main obstacles were identified as:

Structural (original structure of the building)

Spatial (administration's allocation of space)

Attitudinal (our own victim attitudes)

Emotional (stress and inconvenience of remodeling)

One of the best aspects of this session was the airing of some long-term frustrations. Once these concerns and frustrations were confronted and named and on the board, we could begin looking for solutions instead of feeling helpless. We realized some of the concerns were going to take work and planning to solve. They involved such major activities as removing walls and relocating the computers. However, some were surprising easy to implement. For example, the front door of the library is in the middle of a glass wall; users frequently had trouble even seeing the door. Staff members had watched this happen repeatedly and felt that it was a problem that was insurmountable, one of those structural problems over which we had no control. However, right at the workshop we saw a simple, inexpensive solution. We decided we could place plants in front of the windows and create the illusion of a wall without loosing the advantages of the windows. The door became more visible at once as the only glass partition without a plant.

An added benefit of the process was heightened morale. The staff had put in a whole day of planning and working together on a future vision of the library. This was a first for everyone. Never before had we all taken a whole day off together from the routine work and shared ideas. It was an exercise in teamwork.

Strategic Directions Workshop

During this session we looked at the question, "How can we solve the difficulties involved in

6

implementing our new ideas?" The staff was eager for this workshop; they were ready to create a plan. We divided into teams of two people. Each team was to come up with two proposals to deal with each contradiction. To further stimulate creative ideas, each team had a different focus, described as "wearing a different hat." The first team wore the "Music Man Band Hat." Their focus was on engaging the most people in the activity as possible. The second team wore the "Quick and Dirty Hat." Their focus was on getting the job done rapidly. The third team wore the "Madison Avenue Hat." This team was to plan as if they had as much money as they could use. The fourth team wore the "System Activators Hat." They were to be the ones who knew how to work the present system--no outlandish ideas here, just practical suggestions. The last team wore the "Wild and Crazy Hat." Their focus was on innovation. They were told not to even try for feasibility, just to be creative. Each team's ideas were written on color-coded cards according to the contradiction they addressed. Soon the board was full of ideas. Examples of an idea from the Wild and Crazy Group included taking down all the interior walls. The Madison Avenue Group suggested cutting a doorway between two rooms and buying all new furniture. The Quick and Dirty Group suggested trading furniture with other libraries on campus and designing better signs. They also suggested that we could solve the messy entrance problem by relocating the copy machines and putting up display shelves opposite the glass entrance walls. The Music Man Group suggested getting the painters in to repaint, the electricians in to relocate the computer stations into one area, and holding "town hall meetings" with staff, the administration, and student groups. There were some great ideas on this chart; many of them were implemented during the remodeling. The ideas were clustered by intent and the clusters were named. This produced a huge chart with over 60 ideas.

Next we began to boil down this chart into a prioritized list of requirements for the new floor plan. Six phrases were identified and arranged on a chart with the most important ideas on the top line, the least important ideas on the bottom line. The easiest ideas were on the left, the most difficult on the right. This chart was then hung in the staff workroom for the remainder of the project.

| Openness | Simple/Logical | Computers Consolidated |
| Easy Copying | Reference Accessible | Attractive/Clean |

Now at a glance we could see what our priorities were. 1. We had decided that the most important requirement was to achieve a feeling of *openness* in the library.

2. Closely related to openness, the arrangement needed to be *simple, logical* and easy to understand.

3. The *computers* needed to be *centralized* and close to the Reference Desk.

4. The photocopier traffic jam in the main hallway needed to be eliminated and the *copiers* placed in a more *usable location*.

5. The service areas, especially *reference*, needed to be easily *accessible* and visible.   The Reference Desk needed to be located in the center of the CD-ROM databases and the reference collections.

6. Finally we wanted the library to be *attractive* as well as functional.

With the chart in front of us, we were ready at last to begin designing a floor plan. We had envisioned where we wanted to go, we had identified what obstacles stood in our way, and we had determined the strategic directions we needed to take to deal with the obstacles. The time had come to translate all this into a practical design for the new floor plan. Each individual drew a floor plan and prepared to explain how it met the requirements on the chart. Then in teams of two or three people, each person explained their floor plan, and each team developed a floor plan that combined the best ideas. The conclusion of the session was a presentation of the three floor plans.

The next session was to develop a unified floor plan, one that satisfied the critical requirements and combined the best ideas from each plan. We did this by asking the following questions:

> Which features do you like the most?
>
> Dislike the most?
>
> What are the most significant features of each plan?

We worked with a huge copy of the floor plan and soft lead pencils. Many ideas came forward. Some became integral parts of the remodeling such as the suggestion to take down the wall that separated the east side of the library into two rooms. Other ideas were discarded such as the idea to make the librarian's office into a copy center. Suggestions were sketched in, changed and moved, and finalized as the group reached consensus on the placement of items. Within an hour we had a floor plan and were ready for action planning. (The appendix includes the before and after floor plans.)

Action Planning Workshop This workshop identified what specific actions or tactics were needed to implement the plan. To begin the workshop we again used visualizing. We imagined the day before school would start in the fall with the Library remodeled. Each person imagined what he felt and heard. The facilitator asked us such questions as "How long did it take? Who did it? How did you do it?" Next we listed our strengths which lead to this victory. We also listed our weaknesses and the benefits and the dangers of the plan.

Next each person listed five actions or tasks that would move us toward the accomplishment of the remodeling. These tasks were shared with the whole team, clustered and named.
Our Action Teams were:

 1. **Detailed plan on paper** -- every shelf unit and table had to be numbered and drawn in on both the old and new floor plans.

 2. **Weeding and loose ends --** reducing the size of the collection and completing projects underway.

 3. **Staging** -- borrowing extra book trucks, hiring student help, arranging for pizza, etc.

 4. **Physical facilities** -- arrange for construction, electrical work, etc.

 5. **Cost analysis** -- obtaining cost estimates and administrative approval of the budget**.**

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Implementation Timeline Workshop

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9

The next step was to develop a timeline and calendar of when projects and tasks needed to be completed. We decided the best approach was to make the changes in phases over the course of a year. This would create the least amount of disruption for patrons, and reduce stress levels on the staff. With a large calendar and an erasable marker we scheduled dates when the projects of each action team would be completed. This work was going to take months, so regular meetings of the whole team and progress report dates were scheduled.

User Surveys

Before we proceeded with the remodeling plan we wanted to obtain some reactions from our users to the current situation of the library. Did our users think that spending time and funds on remodeling was what they needed? Were we addressing the right problems? We used two different techniques to gain some user input.

First, a student employee used the library for a report for a Consumer Science undergraduate class. As an employee he had worked at the circulation desk for ten hours every week and from that vantagepoint was able observe users and their problems in the library. As an undergraduate student he was able to understand the dilemma of how confusing libraries can be to students. He could have suggested improvements such as more computers or better reference service. Instead of these types of suggestions, he recommended that the library focus on change "to improve the environment as a library." In his own words he said, "The pearl that I discovered was the Library's ability of offer a clean, quiet place to study with accessible information for their customers…. I noticed that one reason why students were not studying there was due to the uncomfortable and somewhat sterile environment of the library." He recommended a general uncluttering and clean up of the library, hanging pictures and arranging furniture to make the atmosphere more inviting.

The second technique we used to gain a broader range of user input was focus groups. We

10

consulted with Richard Widdows, a professor in the Consumer Science and Retailing Department and researcher in the area of focus groups. Widdows had previously used this technique to gage student-user opinions of service quality in Purdue University's library system. For our project he used the library as a class project, allowing student to learn focus group techniques during the research process. Students in the class developed the questions, invited to participate in the focus groups, and wrote the report. The conclusions of the focus groups were:

The atmosphere is businesslike and quieter than other libraries, but it is cramped and stuffy. The library needs to be brighter and more inviting.

The entrance is cramped and noisy; "the front door is in your face."

It's hard to find material; layout is confusing; more signs are needed.

Users like having the copy machines in one area, but felt a larger area is needed.

Implementation of the Plan

User input confirmed our plans; remodeling was important to our users. We had identified the same key problem areas. With the confidence that we were moving in the right direction, we began implementing the plan. The first phase was designed as the most ambitious and provided the largest dose of gratification to the staff: The wall between two rooms was removed. This was an exciting day. We took pictures and cheered the physical plant workmen as they hammered and literally kicked the wall down and removed the steel studs. This opened up the entire east side of the library and provided easy access to the entire area. Our most important goal, Openness, was accomplished. One staff member commented, "If we don't get any other part of the plan done, this was worth all the work."

Next the computers were relocated into a single area of the library. This step took longer than expected, as we had to wait for the electricians to fit our job into their work schedule. Following this the bookshelves were moved to their new locations. This involved removing the books from the shelving and sliding the shelving into its new location. It was amazing how fast the shift went;

in a few days we had moved every volume.

The final finishing touches included new posters, window blinds, plants, and paint. The library had always been painted blue--Krannert blue. In a bold step, which was indicative of the confidence and pride the staff now had in their renovation plan, we decided to paint the walls white, because white provides a sense of openness. It was our mark of ownership of the new plan. We had accomplished our goals of redesigning the library with open spaces, logical arrangement, easy to use, and easy to service. The whole staff was proud of the results.

Part II

The main section of this article looked at the process we used to design a new floor plan for the Library. This section will look at the product: What the floor plan looked like when we started and what the final floor plan design was. It also includes the goal each change fulfilled and the cost of each change.

Background on the Old Floor Plan

The library had been designed and built about thirty years ago. Parts of the building are architecturally very beautiful, but there are many features of the building and the library that are now out of date. The main floor of the building includes the Dean's Office and a large drawing room, with the Library assessable from the drawing room via a beautiful spiral staircase. These stairs bring users to the foyer, which is separated from the Library by two glass walls. This is a very attractive architectural feature, but one that presented some of the problems described in the earlier section of this article. Once inside the library, the user is immediately in front of the Circulation Desk. There is little foyer space and users do not have an area to stop and think about what direction to go. One of our users during the focus group described this problem as "The Circulation Desk is in your face." This problem had been compounded by the library security

system that fills some of the area that the architect had designed as entrance space.

The original concept of service when the library was built was that the Circulation Counter would be *THE* service desk; there was no separate reference desk. As the main service area shifted from Circulation to Reference, the library struggled to figure out a logical place for the Reference Desk. Old floor plans indicated that the desk had had various locations through the years, and the current location along the south side of the building was still not ideal. It was visible through the glass walls outside the library, but it was not visible from the Circulation Desk. Users were reluctant to be sent to a desk they could not even see. The Reference Desk was not in the middle of the areas it served; it was impossible for the reference librarian to service the entire area effectively.

The photocopies were near the front door, and therefore the library always looked cluttered and messy as journals and books were piled up after copying.

The Northeast area of the library housed the Corporate Records Collection. This included the paper and microfiche copies of Annual Reports, 10-K Reports, and Prospecti. Before microfiche and electronic access to these publications were available, the paper copies were very vulnerable to theft. Therefore this material was kept in a room that could be locked, and so this room remained visually separated from the rest of the library. The computer network was located in this separate room with the Corporate Records Collection. The reason for placing it there is unclear, but the consequence was that the networked CD-ROM computers were a long distance from the reference desk and not visible from any other place in the library. Many users never found these workstations. The public access online catalog terminals were located near the Reference Desk. Many users thought these terminals were the only computers in the library.

The library has two reference collections, the basic business/management/economics one and a specialized one of Agricultural Economics material. The basic reference collection was located in

13

the southeast area of the library; the Agricultural-Economics collection was in a separate room. Both were relatively close to the reference desk. This proximity to the reference desk was something we needed to retain.

The periodical area was located on the west side of the library. The collection filled the entire wing of the building. The location was acceptable, but the shelving arrangement was confusing. It wound around the area in a serpentine fashion that was impossible to explain.

So the specific problems of the old floor plan were:

Front Door/Foyer	cluttered,
Photocopier Area	crowded, and cluttered
Circulation Desk	too close to the entrance, i.e., "in your face"
Reference Desk	not centralized or close to computers
Computer Area	not visible, located in two areas of library
Corporate Records Area	Too remote from Circulation Desk, not visible
Periodicals	arrangement confusing

Outline of changes:

1	**Remove the walls** between Reference Area and the Corporate Records Room.	$2,000.00	Openness
	Move the Reference Desk to the middle of the east side of the library, so it is in the center of the areas it services	staff labor only	Reference accessibility
	Consolidate all OPAC terminals and the **computers** in the southeast area of the library where they are	$1,000.00 + $4,200.00	Consolidate computers

14

visible through the glass walls outside the library, and from the Circulation Desk. Increase the number of workstations from 20 to 30.

Move the Corporate Records Collection to the room near the Circulation Desk. Move all bound volumes of Annual Reports into this room so Circulation Staff can easily refer people to it. Put all unbound issues of Annual Reports on Reserve behind the Circulation Desk.	staff labor only	Simple/logical
Place the **microfiche collection** of corporate records and the reader/printers in Corporate Records room. [The rest of the library's microform collection would be located in an area right behind this room. This would consolidate all microforms into one area.]	staff labor only	Simple/logical Ease of service
Move the Reference Collection into the northeast area of the library. Move the Agricultural-Economics Reference Collection into the Southeast area of the library. Both these collections would be very near the Reference desk.	staff labor only	Simple/logical Ease of service
Create a reading lounge in the alcove near the front door.	staff labor only	Appearance
Reorganize the periodical collection into a straight arrangement of shelving.	staff labor only	Simple/logical
Move the copiers near the periodical collection.	staff labor only	Ease of copying
Reduce the Reserve Book Collection and remove shelving units from behind the Circulation Counter. This will give **the illusion of more entry space** at	staff labor only	Openness

the front door.

APPENDIX

[EXHIBIT 1 and 2]: THE OLD AND NEW FLOOR PLANS

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