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Reckoning with Organizational Identity and Innovation in Research Libraries

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Abstract

Who or what an organization thinks it is—its sense of identity—greatly informs the choices it makes. Yet an organization's identity, which provides coherence and stability, may constrain or enable an organization's capacity for innovation, which at its core is about doing new or different things. This paper explores the dynamics of organizational identity and innovation through a qualitative study involving leaders from eleven U.S. and Canadian academic research libraries—organizations and a profession that are experiencing an abundance of change and identity threats. A major finding of this research is that the very process of scoping and defining innovation can enable libraries to clarify and reckon with organizational identity dissonance: the gap between a library's espoused identity and its identity in use. How—and to what degree—a library decides to address such gaps can further or diminish its capacity for innovation, as well as sustain or evolve aspects of its identity, over time. This research extends previous research on organizational identity and organizational learning by demonstrating that the nexus of organizational identity and innovation management constitutes a unique and robust site for organizational learning. Practical applications for research and practice in the field of academic librarianship are presented.

Keywords

innovation, organizational culture, organizational identity, organizational learning, workplace

Introduction

Any organization is, by necessity, compelled to look in inward and outward, simultaneously. As they look inward, organizations formulate a sense of what is central, distinct, and enduring about who they are and what they stand for. These are the central tenets of organizational identity (Albert & Whetten, 1985), which is the center piece of this research, originally conducted as part of the researcher's doctoral studies (Romanosky, 2021). Organizations, including libraries, are also compelled to turn outward in the ongoing work of comparing their internal understandings of identity against images held about them externally by their users, the larger organizational structures in which they are embedded, and the fields of which they are a part. In fact, one can argue that an organization cannot truly understand its identity without engaging in the work of receiving feedback from the many systems of which it is a part and engaging in a process of sensemaking (Weick, 1995).

As an organization responds to the needs of and feedback from its broader environment, it engages in the work of innovation. Innovation, which at its core is about trying new things, has become central to maintaining competitive advantage in almost any field (Anthony & Tripsas, 2016). Yet an organization's identity, which establishes a sense of coherence and continuity for the organization, just as identity does for individuals, may also constrain or enable an organization's ability to innovate. Put another way, identity may enable ways of seeing opportunities for innovation and change, but also ways of *not* seeing.

It was this tension between organizational identity and innovation, particularly as it plays out in the field of academic librarianship, that led to the research question for this study: *How*

does an organization's identity inform its capacity to innovate? In exploring this question, the how and why of innovation, rather than the what—or the outputs of innovation—were the main focus.

Case for Engaging Academic Research Libraries

The field of librarianship, and academic libraries in particular, is one that has, for some time, been immersed in change and identity threats. A recent report from the Association of College & Research Libraries (ACRL Research Planning and Review Committee, 2018) highlights trends such as open access publishing, market dominance of a few publishers, open education resource development, and the evolution of library spaces as just some of the significant challenges and opportunities facing libraries. Thus, an exploration of how libraries are addressing such field-level innovations, and the disconnects between the internal understandings and external images of the modern-day research library that they believe, was an opportunity for fulsome investigation of the central research question.

Definition of Key Concepts

The researcher primarily analyzed the literatures of organizational identity and the management of innovation, with supporting literature reviews in the areas of institutional theory, sensemaking, and organizational learning. The comprehensive literature review is available in the researcher's dissertation (Romanosky, 2021). For the purposes of this paper, and in support of the conference theme of workplace and culture, it is necessary to illuminate a few key concepts from the primary literatures reviewed.

Organizational Identity

The concept of organizational identity was initially framed by Albert and Whetten (1985) as a collective sense, within the organization, of what is seen as *central* to who and what the organization is, that is, its most salient values and traits; *distinct*, compared to other organizations of its kind in the field, geographic location, or competitive space; and *enduring*—that about it which will and must be sustained over time, despite other changes.

It is important to note that organizational identity differs conceptually from organizational culture. Culture generally refers to the tacit understanding and subsequent enactments of what constitutes acceptable behavior within an organization. But culture is but one aspect of organizational identity. By its nature, organizational identity is relational and reflexive, requiring external as well as internal referents for comparison in order for it to take shape (Ravasi & Schultz, 2006). Albert and Whetten (1985) argue that the relative congruence or dissonance between an organization's own sense of identity and the externally held images of the organization can yield great insights about the organization's overall condition: the greater the dissonance between identity and image, they argue, the less healthy the organization is. Identity is operationalized through culture and is also informed by it. This relationship between identity and culture is powerfully illuminated in Dutton and Dukerich's (1991) classic study of how the Port Authority of New York and New Jersey evolved in its approaches to dealing with people experiencing homelessness.

Management of Innovation

For the purposes of this study and paper, Christensen's (2013) definition of innovation, which is defined as any change to an organization's technology, served as a centerpiece. In this definition, technology refers broadly to things such as product design, management practices, and strategic investments. Adopting a broad conceptualization of innovation was useful in this study, where participants were asked to think broadly about how their libraries approached innovation. Christensen (2013) also explores the role of value networks and organizational

nature in innovation management. The value network is the context within which a firm identifies and responds to customers' needs, solves problems, decides to compete, and realizes profit (Christensen, 2013). Organizational nature comprises forces within the organization itself that describe what it can and cannot do (Christensen, 2013). These concepts bolster the aforementioned assertion that organizations look both outward (to value networks and systems) and inward (to culture, beliefs, and practices) in shaping their understanding of organizational identity as it relates to innovation.

Research Methodology and Design

The study used constructivist grounded theory (Charmaz, 2006) methodology. In constructivist grounded theory, both data and analysis are viewed as stemming from shared experiences and relationships between researcher and participant and all that each brings to the research process (Charmaz, 2006). In this way, constructivist grounded theory aligns with an interpretivist epistemological stance (Burrell & Morgan, 1979), which is how the researcher identifies. Also, in constructivist grounded theory, the worldviews of research participants are acknowledged and respected in the generation of theory that is derived by testing the researcher's own guiding interests and assumptions through the analysis of the data created (Charmaz, 2006).

The researcher conducted interviews with participants using a semi-structured responsive interviewing framework (Rubin & Rubin, 2012). This framework calls for the development of an interview protocol that can be flexible based on the focus of the unique conversation between researcher and participant, while still addressing a consistent set of themes. The interview protocol for this study prompted participants to reflect on the organizational identity of their library, a current or very recent organizational change, and what innovation means in academic research libraries. Interviews were 60 minutes in length and conducted via videoconference. Participants received the interview questions ahead of time to reflect on the topics to be covered. Interviews were recorded and subsequently transcribed using transcription software. The researcher then made edits for legibility and shared the transcripts with participants before analyzing the data.

Participant recruitment

To be eligible for the study, participants had to meet three criteria:

1. Currently hold a senior management role (generally that of director, assistant/associate director or assistant/associate university librarian, or senior department head, depending on the organizational structure) in a member library of the Association of Faculties of Medicine of Canada's Network on Libraries (AFMC NoL) or Association of Academic Health Sciences Libraries (AAHSL). AFMC NoL and AAHSL are two organizations wherein university and academic libraries that serve medical schools hold institutional membership. Jointly, the AFMC NoL and AAHSL include approximately 120 member institutions across North America, including both public and private universities. The researcher had access to both AFMC NoL and AAHSL listservs at the time of the study and, thus, access to potential participants from a broad swath of North American universities and academic health centers.
2. Participants' libraries had to have undergone, within the past three to five years, an organizational change that impacted any one or more of the following within the library: roles, responsibilities, organizational structures, funding, university-wide collaborations, collection, services, spaces, or similar. This broad definition of change aligns with Christensen's (2013) broad definition of technology as it relates to innovation.
3. Ability to be interviewed in English.

Participants were recruited via emails to the AFMC NoL and AAHSL listservs. Participants reviewed and signed an informed consent form reviewed and approved by the Institutional Review Board of the Fielding Graduate University, the researcher's doctoral institution. A pilot study was conducted (Romanosky, 2021). The calls yielded 11 participants, who represented a mix of US and Canadian private and public institutions, health science libraries that are and are not part of a university library system, and a variety of positions and years of experience within libraries, as shown in Table 1.

Table 1
Participant Demographic Information

Participant (Pseudonyms)	Type of Organization Discussed	Organization is part of the main university library system**	Role	Years with current organization
Cara	Specialized Library*	N	Associate Director	5-10
Jackie	University Library System		Associate Director	20-25
Julia	University Library System		Associate Director	10-15
Melanie	Specialized Library	N	Director	10-15
Sarah	University Library System		Associate Director	25-30
Ava	University Library System		Department Head	10-15
Helen	University Library System		Associate Director	15-20
Greta	University Library System		Associate Director	15-20
Shannon	Specialized library	Y	Department Head	15-20
Alice	Specialized Library	N	Director	15-20
Mary	University library system		Department Head	20-25

*Refers to a library with a specific disciplinary or subject focus, such as health, medicine, or science

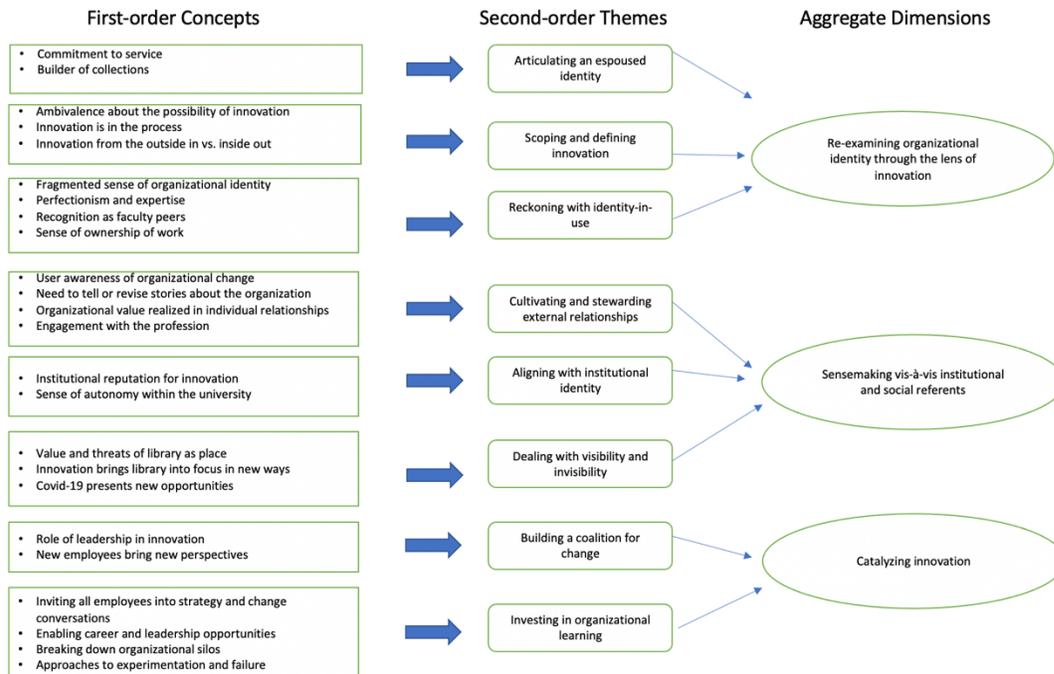
**If organization discussed was not the university library system.

Data Analysis

Analysis of interview data generally followed the six phases of thematic analysis (Braun & Clarke, 2006): 1) reading and re-reading transcripts to familiarize the researcher with the data; 2) generating initial codes and searching for themes across codes; 3) creating initial themes and

generating a thematic “map” of the analysis; 4) reviewing themes; 5) defining and naming themes; 6) producing a report (in this case, a grounded theory), with compelling extracts from the thematic examples, that ties back to the original research question and reviewed literature. The researcher utilized NVIVO software, creating in vivo codes and memos (Charmaz, 2006) to categorize findings. Using Gioia’s methodology (Gioia et al., 2013) of arranging data into first-order concepts, second-order themes, and aggregate dimensions, the researcher arrived at a data model for the study, outlined in Figure 1.

Figure 1
Data Model



Findings

Analysis of participant interview data yielded 24 first-order concepts, eight second-order themes, and three aggregate dimensions in answer to the research question, *How does an organization’s identity inform its capacity to innovate?* This section offers an overview of the findings, organized by the three aggregate dimensions: 1) re-examining organizational identity through the lens of innovation; 2) sensemaking vis-à-vis institutional and social referents; and 3) catalyzing innovation. Representative quotes from participants (using pseudonyms assigned to each) are used throughout.

Re-examining Organizational Identity through the Lens of Innovation

In this aggregate dimension, participants described the espoused identity of their libraries, that which they believe was central, distinct, and enduring about the organization. Participants frequently cited a focus on quality, trustworthy services, and library collections as either central, distinct, or enduring about research libraries, as seen in the following:

We're kind of a neutral party on campus that faculty and departments can come to where we have no vested interest in how they go about things. We are a reliable and trusted source of advice on information management. (Sarah)

Collections are key to pretty much everything we do in our organization. (Cara)

Other themes in this aggregate dimension stemmed from participant scoping and defining what innovation means in libraries. Responses ranged from somewhat pessimistic view of innovation to more hopeful insights about how to recognize innovation in processes and small wins:

I find with library services, generally, there's not much you could do to be super innovative... We're not out there saving lives. (Jackie)

I think innovation is in...being able to look at processes that you do and find comparable processes that are outside the box in which most people think That's a way that I think libraries can be truly innovative. (Julia)

Other participants reflected on the direction from which inspiration for innovation comes, that is, innovation from the outside in versus inside out. Some participants noted how their organizations were trying to cultivate more outside-in approaches to innovation, while others noted the exact opposite, as seen in the following:

A lot of great ideas didn't bubble up from people in the library. They kind of bubbled up from the sides and we grabbed them in and ran with them. (Cara)

We never consult our users, ever. We make changes based on gut. We do not have a structured way of building an idea and then testing it against a community. (Ava)

After scoping and defining innovation and taking a deeper dive into some of the change initiatives in their libraries, participants began to wrestle with a sense of organizational identity-in-use, that was often different from the espoused organizational identity. These often tacit aspects of identity were often seen as problematic and counter-productive to innovation and change efforts. Some participants talked about a fragmented sense of identity realized through varying affiliations and alignment with different user groups:

We have a much closer alignment with a lot of our students and faculty [in hospitals] in their day-to-day work. There is more of a strong affiliation with them, as opposed to being part of the [university] library. (Sarah)

Other participants described how the espoused identity trait of providing great service and being information experts sets an impossible standard of performance:

If you're an expert, you never fail. If we're providing excellent customer service, we never fail...That's an impossible standard, because nobody's perfect. (Melanie)

Others described the desire for librarians, even those who hold academic appointments, to be seen as faculty peers in the broader university. Lack of such recognition was often seen as delegitimizing the role of the library in the university's mission:

I've always tried to impress upon the faculty I've worked with that librarians are your colleagues. We're not handmaidens. We're your colleagues. (Mary)

Sensemaking vis-à-vis Institutional and Social Referents

In the next aggregate dimension of themes, participants engaged in a sensemaking process—a gap analysis of sorts—to better understand who the organization thinks it is and what external parties think of it. Here that participants began engaging in an exploration of organizational identity dissonance between the espoused organizational identity and the organizational identity-in-use, brought to the fore by considering external images of the organization. The importance of relational dynamics was key in this set of themes:

I think about [our] relationships with students and faculty. If we didn't have those relationships, then what would our identity be? (Julia)

Some participants considered the library's relative alignment with the identity and values of the larger university:

At this university, we like to think we're the best in everything...It's baked into the DNA at the institution...The library shares that same reputation. (Jackie)

Some noted how a university reputation for excellence can actually inhibit innovation over time, as a reputation for “doing things differently” becomes ossified and taken for granted, thereby inhibiting innovation:

If you have a very strong reputation, there's often a hesitancy to allow for...failure because of the reputation—because you don't want to tarnish it. (Julia)

Other participants grappled with issues of visibility as they considered their library's external relationships. For some, the strong association with the library as a physical place limited understanding of the new kinds of services, collections, and supports the library is focused on offering, many of which are not tied to a physical location:

One of the things that is our biggest downfall is that we are invisible. Except for the fact that we're not invisible. We're just a bunch of spaces. (Greta)

For some, changes in administrative processes in the university increased the library's visibility. At Alice's library, for example, the library director recently joining budget-planning discussions with other deans and directors provided an opportunity to surface more visibly the library's value proposition to the university:

Now, when I meet the deans, they know...well, they know we exist! They know the health information we provide is the health information for all of the university. (Alice)

Catalyzing Innovation

In the final aggregate dimension, participants described the different ways in which they libraries are investing time, effort, and resources in staff development and organizational learning as they navigated change. In one respect, these investments were being made to evolve the library's structure and services to better meet the needs of users. But the data show that these investments were also aimed to redraw extant mental maps and identity concepts within the organization in an effort to strengthen innovation capacity and a shared sense of organizational identity. Themes in this dimension were among the most frequent across the interview data.

Participants discussed some of the key drivers of the libraries' approaches to innovation. Some described how new library leaders were focused on capacity building within the organization, while also telling new stories about the library in the broader university. Others talked about how university-level drivers to work across disciplines were compelling the library to face its own silos:

Research is now more inter/trans/multidisciplinary...I think research supports is a key area [for] collaboration across/within/between departments on the back end of the library, and where the need for a culture of learning becomes even more important. (Julia)

Participants also spoke about work happening in their libraries to meaningfully involve all levels of staff in developing change initiatives and strategic directions:

[Our strategy] was literally work-smithed by the people who work in the library. Every single word that is in there was supplied not by library leadership, but by people who work in the library. (Greta)

Others described efforts to create more internal leadership opportunities in libraries with a focus on skill development and increasing collaboration across library work units over time:

Every two years [some of our management positions] rotate. People love this because, what do you hear from up-and-coming librarians? They want an opportunity to "try leadership." (Jackie)

Finally, several participants talked about how their organizations are intentionally cultivating support for experimentation and failure in an effort to foster innovation. In some cases, this took the form of formal programs and internal funding:

Our dean started this thing called the Innovation Fund. People Could apply for money for a one-time trial of something for a year. [The dean] pretty much said yes to everything because that was her attitude. If it doesn't work, it doesn't work. (Shannon)

In other cases, fostering innovation aimed at lowering perceived barriers to trying new things by altering organizational language, such as referring to new initiatives as "pilot projects." These shifts in participants' libraries were especially important in dealing with identity-in-use traits of expertise and perfectionism that surfaced in many of the interviews.

Some participants reflected on what the library's increased tolerance for risk or even failure meant within the context of universities and libraries that are increasingly supporting entrepreneurship:

I think in the same way that there's been an attempt to build a learning culture [at the library], there's been a very strong attempt to build more room for failure.... You can't be an entrepreneur if you're not willing to fail, because otherwise you wouldn't be putting your neck out there to try the new thing anyway. (Julia)

Discussion

A significant finding of this research is that talking about innovation in libraries, specifically, prompts a reckoning with organizational identity dissonance: gaps between a library's espoused organizational identity and its identity-in-use. How—and to what degree—a library decides to address such gaps can further or diminish its capacity for innovation, in addition to sustaining or evolving aspects of its identity over time.

This process of reckoning also surfaces temporal identity discrepancies (Corley & Gioia, 2004; Schultz & Hernes, 2013), or the disconnects between a library's envisioned future identity, its present, and the events of its past that may constrain or enable the attainment of that future state. Engaging in such a reckoning helps a library realize how its identity has evolved or may need to evolve over time, accentuates what aspects of identity constrain or enable that identity, and also changes the ways in which the organization manages innovation.

This research also demonstrates that talking about innovation is a discrete and effective way to surface organizational competency traps and core rigidities (Anthony & Tripsas, 2016; Barrett, 2012) that can become part of organizational identity over time, but which inhibit generative and reflective thinking through an overreliance on those same identity traits.

Thus, this research provided evidence that the nexus of organizational identity and innovation management constitutes a robust site of organizational learning, with changes to one inevitably impacting the other. Practical applications of this research in libraries could include the development of structured interventions that target this nexus, such as structured dialogue sessions with the library and with its users to create a reflective space to inform strategic planning efforts and new initiatives.

Conclusion

Who we think we are has implications for what we think we should do. This is true for organizations like libraries, just as it is for individuals. This research sought to illuminate the relationship between an organization's identity—who it thinks it is—and its capacity for innovation. Ultimately the research demonstrated that the process of scoping and defining innovation—what it means to a library and how it can be approached—enables a library to reckon with both explicit and implicit aspects of its identity. Conceptualizing innovation promotes a clearer picture of the dissonance between internal images of the library and external understandings of it. In this way, the nexus of organizational identity and innovation serves as fertile soil for reflective thinking, organizational learning, and the evolution, over time, of a library's understanding of its identity and relationships with the many systems of which it is a part.

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