Involving stakeholders in organisation change in libraries: experiences from New Zealand

**Sue Sutherland,
Libraries Manager,
Christchurch City Libraries**

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Greetings

Tena koutou katoa. Ko Sue Sutherland ahau no Te Whare Pukapuka aa Iwi Otautahi. Nga mihi nui ki a koutou i Aorearoa.

I bring greetings from New Zealand Aotearoa – the land of the long white cloud. New Zealand is the home of the Maori, the indigenous people, and of many others of British and European descent who travelled half way round the world to start a new life about 150 years ago. In recent times, immigrants from Africa, Asia, and the Americas have also come to call New Zealand home.

We are a Pacific nation, with three main islands, hanging off the side of Australia with whom we have sibling relationship! 3.8 million people live in an area similar in size to the UK (which has nearly 60 million people).

New Zealand is known for its scenic beauty, Maori people and culture, the All Blacks and rugby, sheep, bungy jumping and its friendly people. We are a do-it-yourself nation, self reliant, self deprecating and laid back, but also fiercely proud of our international achievements and achievers in sport, culture and the arts, and of our nuclear free stance. Being far away from most places we travel a lot (most young NZers aspire to some OE – overseas experience) and we are always looking to see what the world is doing in new fields of endeavour. We are quick uptakers of new technology – we like to give things a go.

We are less well known – but our reputation is growing – for wine, for electronics and software innovation and for our public libraries!

New Zealand's public libraries

New Zealand has some 77 local authorities of varying sizes – all of whom provide public library services. There are 18 metropolitan libraries serving populations of 50,000 or more. Christchurch City Libraries is the second largest of these in terms of population served (319,000). We have a central library, 12 branches, 1 mobile, and we issued in excess of 5.5 million items year ended 30 June 2000. We have an operating budget of NZ$20 million (about 72 million Danish Kroner). We provide the usual range of information and circulation services, and have well developed services for children with many innovative programmes such as Books for Babies (10 years old), Headstart, Big Tick, Homework help line, and so on. We have been on a programme of refurbishment and renewal of our libraries – the most innovative of these, and the library that has the best view in the whole world, was opened on the beach at New Brighton in 1999. Elliptical in shape (like a moored boat at the shore end of a pier) it is a community library with a difference. Features include a pipeline with playstations, TV and interactive games for youth, listening posts with music and radio and armchairs in which to sit and look out to sea and surf.

We were the first public library in Australasia to have a web presence (1995) and our content rich site was recently relaunched and you can find out more about us at
http://library.christchurch.org.nz/

You have just had the 5 minute Cook's tour of New Zealand and its libraries, and I hope by now your appetite is whetted to visit us! (NZ relies heavily on its tourist industry for inflow of capital – and the NZ dollar is low at the moment so it is a good time to plan a trip)

But more importantly you now have a context in which to understand what I have been asked to talk to you about this morning. The theme of your conference is "Scandinavia meets the World" – conference on best practice. I applaud the vision of the conference organisers because they have recognised that the broadening of horizons, the sharing on an international stage, the learning that can take place by looking at what others are doing, is very important. New Zealand has always looked to overseas to see what is happening and how we measure up. The US and UK literature is widely read but Scandinavia has also proven a fertile ground for innovation. In the 1970's and early 1980's several NZ Librarians visited Scandinavia to look at library buildings as NZ at the time was rebuilding several of its central libraries. Your countries have had a reputation for good building design and certainly the one or two libraries I have managed to see at places such as Malmo bear this out.

Organisational change

I want to now turn to the topic of change. It may be a cliché to say that "change is the only constant we can be sure of" but it is nonetheless true. Since 1996 Christchurch City Libraries has been proactively changing the way it works, is organised and its culture. When I was appointed Director in 1995 the Library was considered a successful, leading public library. My concern, however, was that in that reputation for success lay the very seeds of our own destruction. The last five years has seen rapid changes in technology, in the direct availability of information to the end user, a rising standard of customer expectation about service and what it means to have service, and an ever increasing pressure on budgets – to do more with the same or less. There are now competitors to some parts of the Library business, and if there are not competitors by product or service, there are definitely competitors for how people spend their time. If we were to continue to be leading edge we were going to have to learn to work much smarter, put ourselves in the customer's shoes and slough off our complacency. We needed to respond rapidly to changing service demands and implement projects more speedily. We needed to reallocate resources internally yet our organisation and our people were struggling to meet these challenges. We recognised we needed an organisation and a culture that was significantly different from the one that is traditionally characteristic of libraries.

What are some of those characteristics? You may find you have some, perhaps even all of these in your own libraries:

- Hierarchical approach to management and organisation – resulting in parent/child relationships – the need to seek permission rather than the need to seek guidance
- Emphasis on status and position, rather than on responsibility and role
- Consultative culture (which means everyone has a say on everything and is upset if what they say doesn't happen) No decisions unless everyone agrees – often means no decisions!
- A need for certainty – risk and change averse
- Many "sacred cows" – issues and services which are untouchable
- The "its been tried before and won't work" syndrome
- "Add on more" – never stop doing anything
- Strongly unionised
- Rigid job descriptions and task demarcation
- Aging work force – with little or no experience outside your own library

- Colleagues trained more than 15 years ago – skills and capabilities haven't kept pace with what is needed today
- Some colleagues with ideas and vision frustrated because they can never get things done – good people leaving
- People who are opinionated and individualistic, highly professional but often naïve and un-businesslike
- Lots of committees with not much action
- Protective culture – staff not faced up to poor performance

What we wanted was:
- Colleagues empowered to make decisions closest to the customer
- Emphasis on individual and team responsibility and role
- Strong focus on ongoing learning and development
- Good decisions informed by quality (not quantity) thinking
- Project approach to developing new services and products
- Feedback on performance an accepted part of the way we do things
- Professional values balanced with businesslike approach
- Ability to swiftly reallocate resources to meet customer and service need
- General job roles with an emphasis on outputs and results rather than inputs and tasks

Sounds great! Sounds what we all want! Sounds idealistic and unachievable? Sounds easy and why aren't we all just doing it? Well I think it is all of these things and one of the reasons that it **is** all of these things is that in any change we are dealing with people. With their different needs, perceptions, intellect, capability, thinking and working styles.

Change at Christchurch City Libraries
So how do you make change happen, how do you make it stick over time? What conditions, capabilities and knowledge do you need? Is there a formula? What constitutes best practice? I certainly don't claim we have all the answers but we have managed to implement some significant change projects and to do this in a way which has enabled colleagues to make decisions for themselves and to have input into the development of the changes.

(I should say at this point that the Stakeholders I am talking about in this paper are staff. Customers as stakeholders in change is another paper in its own right!)

For the past 5 years we have been on a path of change. We have had both incremental change and radical change. I am going to draw on just two of examples in this paper. We have changed major processes such as the way we select, acquire, catalogue and process our stock. We have worked on a Central Library Development Plan which has resulted in a new structure, new teams and team leaders, a new focus for services and a refurbishment programme to deliver on these services. All of these changes have been done within existing budgets from savings made through better processes. Let me look in more detail at what we have done and how.

Collections Services

The changes in our Collection Services area were significant. We now source about 75-80% of our print resources from just 3 suppliers: this is monographs, serials and NZ materials. The major supplier also supplies the catalogue record straight to our database, and the stock

processed to our requirements and delivered to the appropriate community library, or Central Library. Selection of stock was centralised and the profiles for each library drawn up by the Community Librarian, or the subject manager in the Central Library. These changes resulted in downsizing the team by more than 10 FTEs. As my interest is more in how we went about this and not what the new processes were I will leave you to read about that for yourself. My colleague, Anne Anderson, who is the manager of the Team, and the leader of the change project, has written up the project in a conference paper published at
http://library.christchurch.org.nz/BiblioFile/index.asp

Central Library Development Plan

The other major change project involved the development of a three year plan for the Central Library. This project was less about changing and improving processes and more about revitalising and motivating the teams to seek a new vision for their service.

The processes we used in both change projects were similar and the key to their success hinged around a number of factors:

- Use of consultants
- Setting a clear direction
- Involving people in the development of implement plans within that direction
- Good support for colleagues through change
- Clear communication
- Review

Use of consultants
I am not sure what the library climate is in this part of the world but in NZ it has not been common to use consultants in libraries. This is changing but when we were undertaking our first project we thought long and hard about whether we needed any expert help from external sources. We decided we did for several reasons: we lacked expertise in outsourcing, we wanted an objective and external view, and we wanted to learn from people who had experience in implementing change so that we could acquire skills in-house to use in the next project. However, we held strongly to the view that the consultants were there to advise and support the Manager who was leading the project. They were not the project leaders themselves. This was important because we wanted to retain ownership and control of the outcomes, and we wanted the manager to be seen to be leading. A clear brief of what is required and sound tendering process ensured we got a good fit with our consultant teams. The benefits were:
- someone to manage the processes and keep us on track and on time
- knowledge and expertise shared and passed on
- when the going got tough for the project manager they provided much needed support and a reality check. The kept us from losing courage and heart.

Setting a clear direction
The role of leadership is to set clear directions for the organisation and this is never more true than when change is occurring. People need to understand why the changes are necessary, what is driving the change, and what the non negotiables are. In the Collections project, the consultants did a review of our current situation, talking with staff and managers and then proposed a solution for doing things differently. The Library's leadership team accepted the

solution in principle indicating clearly that this was the direction we were committed to moving towards. At this point we did not have all the answers, we had some significant doubts about whether the changes could be achieved but we believed the final outcome was the right one. A similar situation occurred in the Central Library development plan where there Leadership team signed off on the general direction we wanted to head – again in principle – waiting for the detailed work to be done.

Involving people

The next stage of the projects was the implementation planning. This was where the detailed working through processes and options took place. We wanted to involve every member of the Collections team and also people from the rest of the network. A series of task forces was set up around a number of different processes. It was their job to look at how the changed process could be implemented, how we maintained standards and where compromise was necessary. These teams had tight timeframes and specific outcomes to deliver. They were given good support by the consultants with managing their time and a process to work towards. They were expected to deliver! The organisation amazed itself. For the first time in recent organisational memory, a team of people delivered quality work, within a short space of time and lived to the tell tale. This was a first for an organisation given over to time consuming consultation, large committees and long time frames. Although some people complained that they hadn't had sufficient time, the reality was they delivered. They did not fall into the trap of "perfect draft" syndrome. The went for the 80/20 rule knowing that when the did come to actually implement they could solve the remaining problems at that time.

In the Central Library project, the team involvement took on a slightly different flavour. We had already resolved to organise around 8 theme teams. To give substance to what this might mean in practice current staff were asked to select a team and come up with a plan for what their service might look like for the customer if they were to deliver excellence. Creativity and imagination were applied – sacred cows became "scared" cows (partly due to a misprint on an overhead! – but that became synonymous with how we wanted to tackle the hard issues – scare them away). Each team presented their plans with both a visual display in the staff stairs and a verbal one to the Leadership team. Videos were produced and new skills in PowerPoint and other tools were developed. The interesting thing about this process was how it gained momentum. People were prepared to consider doing things like moving to multi purpose desks, moving out from behind their desks and roving which had been resisted on previous occasions.

Support for colleagues through change

The crunch came in both projects when we came to actually implement the changes. In Central Library it was as though the previous part had been a game and people suddenly realised what they had been imagining was now about to be implemented. This meant a complete reorganisation as we were disbanding the previous teams and moving to a new team structure. In the Collections project the main issue was downsizing and finding new positions for colleagues who were no longer going to be working in the newly formed teams. Our stated objective was minimal redundancy and to offer a 12 week retraining programme where there was at least a 60% fit of capability. This was the time for supporting colleagues in the changes and we had a number of different strategies:

- Job application workshops
- Career counselling
- Understanding change workshops
- Team Leader workshops

- Working with the Union

Job application workshops

All colleagues in Collection Services had to apply for their positions, and all team leaders in Central Library. Aside from any other reasons, this is a good way of ensuring that colleagues know that the new job is different from the old one, which is the danger of slotting people into jobs.

Many of our people have not had to apply for a job in 20 years, and probably some of them didn't do it the first time round either!

We held Job Application workshops before the job applications had closed and they covered
- Skills identification
- CV structure
- Covering letter
- Role playing an interview question such as "How do you contribute to the success of a team?"

Career Counselling

The purpose of these was to support the individual to make good career decisions for themselves. These sessions were confidential to the person, and focused on the individual not the organisation. Our experience is that these sessions were greatly appreciated by staff. In some cases it helped individuals actually move on and leave the organisation when the recognised their needs cannot be met.

Again, these sessions were timed before colleagues needed to apply for jobs. This supported the concept of encouraging our people to take personal responsibility for their working lives.

Career counselling may also be supplied at the end of the process for those who are redundant. It can help them detach from the organisation and get on with their life.

Understanding change

These were general workshops, purchased from external providers. An understanding of the stages of change was helpful as was the knowledge that people accommodate and react to change differently. It also gave our teams a common language with which to discuss change.

Team Leader workshops

We held these before we advertised the 8 new positions of Team Leader in the Central City Library. The purpose of these was to give colleagues (both existing Team Leaders and those wanting to become Team Leaders) the opportunity to really see if they were team leader material. The organisation also wanted to emphasise that what we want in a team leader has changed. (If you are interested in reading more about our expectation of team leaders you will find a paper by Debbie Dawson, HR Manager at the Library on our web site at http://library.christchurch.org.nz/BiblioFile/index.asp)

The workshop had three parts
- a look at the new role of Team Leader
- results of individual profiling

- first part of the career counselling process

Working with the Union

Another important stakeholder in the whole change process was the Union. Key to this relationship is knowing the terms of the contract between Staff Union and Management and working within the framework of that contract to achieve mutual outcomes. We were fortunate in that we had already established good working relationship and there was already some degree of trust. Keeping the Union informed ahead of time was important – as was providing opportunities for Union and staff to discuss issues without Management present. I am always a firm believer in trying to stand alongside the Union in stead of across from them in an adversarial position. If you can achieve an agreement that the good of the organisation and the good of the staff are not in conflict you are a long way to achieving a successful outcome. We did have to make come compromises – we had to appoint two previous team leaders as of right – but we were able to put some processes around this to ensure that they were aware of the new environment.

Communication

Communication is one of those things that everyone knows is important but which so often goes awry. We put time and effort into trying to keep people informed at the right time but there were still some lessons for us in things to do and not do! Some of these were:

- Communicate even when you have nothing new to tell! Silence can be interpreted as "trying to hide" things.
- Use lots of different media: newsletters, briefings, diagrams, intranet, casual conversations, open door invites. People take in information in different ways and at different times.
- Repeat the same message – people are often only ready to hear the message when the change starts to impact them.
- Be 'up front' if you do not know the answers – people will see through "fudging".
- Resist the urge to reassure – it can blur the true message which can sometimes be interpreted as not having to make any changes.

It's really important that all of management, and not just the manager of the affected area, are visibly interested in a large change project. We had repeated requests to see more of 'management'. Many affected colleagues reported feeling ignored. They felt like social pariahs.

Review

These sessions were held after go-live date and when some of the dust has settled. They allowed for all affected people to give feedback on the process and to capture learning for the future. For many it was an opportunity for 'closure'. For instance, some who were pleased to have got one of the new jobs, felt a lot of guilt about those who missed out, who had left or been made redundant. The sessions were facilitated and created an opportunity to celebrate what had gone well and to formally mark the end of the old and the beginning of the new.

Conclusion

As you can see a lot of time, energy, thinking, planning and resources has gone into to changing our processes and culture. Has this been worth it? Yes definitely! Has this been at the expense of new service developments and products? The answer is an emphatic no. Because of the changes in processes, culture and leadership we have been able to tackle a significant number of new projects in the last three years. As well as the two outlined here we have:

- Revamped our website
- Launched a comprehensive suite of electronic resources available remotely

- On Thursday launched our virtual branch which provides phone, fax, email and eventually desktop to desktop services for all but our walk-in customers
- Developed partnerships with schools for delivery of web and electronic services
- Built two new libraries and have a third in planning (2500 sq meters)
- Launched a business service in conjunction with a Council information service
- Incorporated Council information services into the library network
- Developed the Council's Web site
- And …….

What has made this possible? There is a profound saying in Maori:

He Tangata He Tangata He Tangata
It is people, it is people, it is people.

Involve your people in the development of change – enable them to take control as much as possible of the changes affecting them – and give strong leadership on the direction you are heading.

Thank you and Kia ora.