Building teams: reaching beyond medical libraries for inspiration

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[Abstract] Research model in our UCLA Library has also transformed into collaborative and interdisciplinary as a research community. The most successful units within the library work in this cooperative way. However, most of the public service units still work in their own silo. Building research and service teams to achieve the library’s development strategic plan that paves the way for a reorganization of the public service units in the library is the most effective and proper way. In order to address this accomplishment, the User Engagement division of UCLA Library has launched. This article demonstrates the reason why UCLA Library need to build the team and the way in which UCLA Library use to build the team in order to bring about the goal of reaching beyond medical libraries for inspiration.

[Key words] Research model; Collaborative; Interdisciplinary; UCLA Library; Building teams; Beyond

Research in the scientific community is often collaborative and interdisciplinary. This model has recently been extending into the social sciences and humanities communities. The most successful units within the UCLA Library have been ones that have been able to work cross-departmentally to accomplish goals and further the library’s mission. However, until recently, most public service units in the UCLA Library reported up to the University Librarian through different Associate University Librarians. Each subject library did research assistance (reference), outreach to faculty, collection development, and teaching services in their own way. Each subject library worked in their own silo. Since the most successful libraries mirrored the collaborative and interdisciplinary work seen in our larger academic community, it was time for a change—a reorganization of public service units in the UCLA Library. Out of this recognized need, the User Engagement division of UCLA Library was formed.

Building the Team: Why

Reviewing our library structure, senior leadership in the library acknowledged a change was needed. The way individual libraries worked, activities were being duplicate and staff energy was being expended creating parallel systems. Multiple librarians were trying to set up new services to partner with our faculty throughout their research life cycle. Several librarians in various libraries were struggling with similar collection development challenges related to training new librarians or negotiating for new resources. Every library had a service point for reference related questions, but each library had their own policies and procedures for staffing those services points. It was in this environment that UCLA Library began developing a new strategic plan in 2015.

The strategic plan has six of elements. The library will: 1) "play a visible, vital, and valued role in UCLA’s Life," 2) "ensure effective access to information and resources," 3) "function as the heart that enables research to thrive," 4) "become a platform and catalyst for innovation in teaching and learning," 5) "develop a strong culture of engagement"
and leadership," and 6) "provide excellent spaces for people to be productive." [1] With a commonality of mission and an emphasis on leadership at all levels, the strategic plan paved the way for a reorganization of the public service units in UCLA Library. The division of User Engagement was formed to align eight libraries’ public service units under a single Associate University Librarian. The new division’s first task was to design a structure that would enable the success of the strategic plan, address the challenges of work happening in parallel/duplication in various library units, and facilitate the future growth of the library and its staff.

**Building the Team: How**

A redesign team of 13 individuals was led by the Associate University Librarian (AUL) for User Engagement. The individuals asked to join the team represented one of three aspects of our organization: 1) library units in the newly formed division, 2) library stakeholders who had service relationships with the new division ( circulation/interlibrary loan, special collections, international studies ), or 3) evolving service initiatives (data management, teaching and learning services, outreach) outlined in the strategic plan. After discussion and brainstorming, three leading ideas were proposed by the group. First, User Engagement could become a new division and keep the eight individual library units as they were previously functioning (As – Is Structure). Second, User Engagement could organize by services across units, with librarians and staff reporting to the head of the service regardless of which library unit they worked in (Functional Structure). Third, User Engagement could organize by broad subject division, grouping the eight libraries into three subject divisions each led by a director reporting to the AUL (Subject Structure).

To evaluate the proposed plans the redesign team identified two challenge scenarios. Each scenario was based on a common problem faced in the existing structure. The redesign team was asked to split into three groups representing one of the proposed structures. Each team reflected on both scenarios, considering how the proposed structure they represented would improve on challenges related to decision making, budgeting, communication, and scoping of services. The resulting evaluation showed problems with each proposed structure separately to resolve the scenario challenges. However, combining the subject and functional models into a matrix reporting structure led to a unique opportunity to work through those challenges.

**Building the Team: What**

Matrix organizational structures have roots in the discipline of project management and have been used in larger organizational structures to leverage project leadership activities while centralizing administration leadership responsibilities external to the project team [2]. The team planning the new User Engagement structure acknowledged that oversight of personnel, budget, facilities, and the representation of unique subject discipline services were still necessary responsibilities. The team also acknowledged colleagues who were most successful in previous organizational structures had been able to work on functional projects across divisions and then leverage the project experience to move the organization in a new direction or to move themselves into management careers. A matrix structure ( Figure 1 ) would give the opportunity for people to develop functional leadership skills through mentorship of division directors and the AUL. In this new structure there would be seven elements reporting directly or indirectly (consulting members) to the AUL.

1) Division directors (Figure 1, circles on left) are the heads of specific subject libraries. Directors supervise librarians and staff of the unit, conduct performance review, manage budget responsibilities, and provide long term vision for subject areas & divisions. Division Directors report 100% to the AUL and serve as members of the User Engagement Leadership Council.

2) Functional team lead (Figure 1, circles on right) is a librarian from a subject division who is assigned 50% of their time to leading in one of five functional areas ( Collections, Outreach, Research
Assistance, Research Partnerships, or Teaching and Learning). A team lead reports both to the AUL, for the 50% of their job allotted to functional leadership, and their division director, for the 50% of their job related to division responsibilities. They will implement their shorter term vision for the functional areas. The lead position is a two year term, with an application and interview process before selection. Team Leads serve as members of the User Engagement Leadership Council.

3) Functional team members are librarians and library staff in subject divisions (Figure 1, yellow bars) who work across all functional areas as part of their daily responsibilities. Team members were asked to self-identify in which one of the five functional areas they will spend 20% of their time leading cross departmental projects. The other 80% is dedicated to subject division responsibilities. A team member plays a bidirectional communication role by representing their subject division on the functional team and representing their functional team to their division. Because of the bidirectional role and 20% time commitment, functional team leads will contribute letters evaluating team members’ contributions in the performance review of each team member.

4) Consulting members are librarians and library staff from related units (Figure 1, gray bars on either side of the matrix) who can be called upon for consultative or membership roles in functional teams. With some library units reporting to another AUL, it is important to seek input and broad alignment for public service and functional areas. Consulting members join functional teams based on goals and discussion topics relevant to their group, but do not have the same time requirement of functional team members.

5) User Engagement Leadership Council (Figure 1, large blue bars) is the group of functional team leads and division directors reporting directly to the AUL. All members of the council have equally weighted voices during discussions of services and policies regarding the new division. The purpose of the group is to set service priorities and direction for the division in consultation with stakeholders, aligning functional and divisional needs. The group is also charged with developing a culture of leadership and engagement across the library.

6) Functional teams (Figure 1, light blue bands on left side) are constructed of team members from the subject division and a functional team lead. The teams lead the library’s approach to one of five functional areas – collections, outreach, research assistance (formerly called reference), research partnerships (library services in the research life cycle), and teaching and learning. The teams set priorities for services and guide policy setting in their functional area.

7) Subject Divisions (Figure 1, light yellow bands on right side) are groups of library units, loosely organized by subject. Divisions are led by the directors. Divisions contribute members to the functional teams, advocate for the unique research and educational approaches of their disciplines, and implements services for to support their disciplines’ needs.

Challenges and Opportunities in Creating a Matrix

Once roles were defined, the planning team reviewed the original call for change in the strategic plan and the challenge scenarios. The planning team
wanted to generate a structure that would be effective at solving problems and increasing leadership opportunities. In order for this structure to be fully functional, leadership would need to be equally shared among those who had fiscal and supervisory responsibilities and those who were leading functional service areas. Cultural change related to decision making and communication would be the key. During interviews for divisional directors and functional team leads, all candidates were asked questions about team oriented leadership and how they would enable this new shared leadership model. In addition, to create a solid culture of collaboration, one activity of the newly formed User Engagement Leadership Council (division directors, functional team leads, and AUL) was to establish explicit working norms—expectations of how the team functions together to accomplish their work.[3]

Another challenge was developing an organizational culture that expected leadership from all members of the organization. Division directors and the AUL promoted the principles of cultural change within unit, dedicating time at regular meetings to discuss the different structure, the desired culture, and expectation of leadership from all team members to help move the library in this new direction. As part of a functional team, there would be opportunities to develop leadership and project management skills within a large academic library structure. Functional team lead positions were made to be a two year term to allow members to try out formal leadership positions for a limited time. At the end of the two years, a new call for team leaders will be announced giving other team members the opportunity to apply. It would also be possible for a team lead to finish a term leading in one functional area and then seek leadership in a different functional area, thus gaining the breadth of experience needed for senior level management positions.

The matrix structural shift has also presented new opportunities and a renewed vigor for the library. There is an overall sense among User Engagement leadership that work satisfaction has improved in the first quarter after implementation. Librarians and library staff have expressed increased engagement with work, excitement about daily activities, and desire to explore new commitments. Also, functional team leads and divisional directors have noticed increased agency (the emotional and physical ability to affect change in an organization) in librarians and library staff as they suggest new activities made possible through the functional–divisional matrix shift and shared leadership model.

Results of the organizational redesign cannot be fully evaluated at such an early date. However, early experiences indicate success in accomplishing some goals related to cultural change. Ongoing evaluation of the reorganized matrix structure and alignment with the library’s strategic plan will continue. The keys to our organizational future lie in mirroring our academic community’s work style, interdisciplinary collaboration and engaged leadership.

References


团队构建：追求超越医学图书馆的灵感

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[摘要]加州大学洛杉矶分校图书馆的研究模式已经转变为以合作和跨学科为特色的研究共同体。目前该图书馆运行最成功的部门就是以这种方式工作。然而，馆内大多数公共服务部门仍然是在各自的小范围独立工作。构建研究和服务团队是实现图书馆的发展战略规划，并且为图书馆公共服务部门的重组铺平道路的最有效、最得当的方式。为了实现这一目标，加州大学洛杉矶分校图书馆成立和启用了用户参与部门。分析了加州大学洛杉矶分校图书馆构建研究团队的原因以及加州大学洛杉矶分校图书馆构建研究团队的途径，从而实现其作为医学图书馆但又超越医学图书馆而存在的目的。

[关键词] 研究模式; 合作; 跨学科; 加州大学洛杉矶分校图书馆; 构建团队; 超越

在科学界，研究通常具有合作与跨科学特点，这种模式现在已被社会科学和人文领域采纳。在加州大学洛杉矶分校 (University of California, Los Angeles, UCLA) 图书馆，最有成就感的部门是那些能够跨部门工作实现目标并推进图书馆使命的部门。不过，UCLA 图书馆的公共服务部门目前仍是通过不同的大学图书馆副馆长向大学图书馆长汇报他们的工作进展情况。各专业馆以自己的方式进行研究辅助，给研究人员提供参考咨询服务和教学服务，进行馆藏建设，每个学科图书馆也是根据其馆藏情况开展工作。由于最成功的图书馆都是借鉴大型学术研究团体的合作与跨科学模式，所以我们认为重组 UCLA 图书馆公共服务部门势在必行。正是基于这种公认的需求，UCLA 图书馆设立了用户服务部 (user engagement division)。

1 构建团队的理由

我馆的高层领导审视我馆目前的结构后认为有必要对其进行改变，即重组我馆的公共服务部门。在创立同等水平的系统时，单个图书馆的工作方式造成大量的重复性活动，工作人员的精力耗费于平行体系中。很多图书馆员希望在整个生命研究周期中与我校教师合作开展新的服务;有些图书馆从事类似馆藏建设的馆员，正在想方设法应对新馆员培训，和资源谈判所面临的挑战。每个图书馆员都设立解答参考咨询相关问题的服务点，而且为这些服务点的工作人员制定了政策和工作程序。在这种环境下，UCLA 图书馆从 2015 年开始制定其新的战略计划。

这个新战略计划由以下 6 部分内容构成：图书馆将在 UCLA 的生活中发挥明显的、重要的和有价值的作用; 确保信息和资源的有效存取与利用; 成为促进研究蓬勃发展的核心要素; 成为教学创新的平台和助推器; 构建参与和领导的浓厚文化氛围; 为研究人员和师生提供成果产出的最佳环境 [1]。由于使命的共同性和强调各层级领导力，该战略计划为 UCLA 图书馆公共服务部门的重组铺平了道路。用户服务部与 8 个公共服务部门和大学副馆长合作并由一个副馆长领导。公共事务部的首要任务是设计成功实施新战略计划的机构，以便应对图书馆可能面临的挑战，促进图书馆及其工作人员的成长。

2 构建团队的方法

在副馆长的指导下，我馆为用户服务部重新构建了由 13 人组成的团队。参加这个团队的人必须符合我馆用户服务部应具备的 3 个条件之一：一是新设立的科学用户服务部工作的图书馆员，二是与各用户服务部门(流通部、馆际互借部、专业馆藏建设部和国际研究部)建立服务关系的图书馆基金提供者，三是新战略计划中包含的服务项目(数据管理、教学和对外服务) 参与者。该团队经过讨论和头脑风暴，提出了 3 点意见; 用户服务部应成为一
个新部门，并保留另外 8 个图书馆原有的功能; 用户服务部可以组织跨部门的服务活动，图书馆及其工作人员可向任何图书馆的用户服务部主任汇报工作进展情况; 用户服务部可以将 8 个图书馆的用户服务部门整合为 3 个学科服务部，各部门的主任向副馆长汇报其工作进展情况。

为了对提出的不同方案进行评估，重新设计团队确定了 2 个具有挑战性的方案，每个方案都是根据图书馆的现有机构面临的共同问题提出的。新组建的团队分成 3 个小组，每个小组符合代表新构建团队中的一个，而且要认真思考上述 2 个具有挑战性的方案以及他们所代表的团队结构如何提高应对与决策、预算方案、通信联络、服务范围等相关挑战的能力。对不同方案的评估结果表明，在实施上述两个具有挑战性方案的过程中，必须解决好所有问题。不过，将学科与功能模型合成为矩阵报告式结构，不失为解决这些挑战性问题的一个难得机遇。

3 构建团队的形式

矩阵组织结构是项目管理学科的基本要素，不论是大型组织机构决定领导活动的重要手段，而且是强化和集中对外项目团队高层管理者责任的重要手段。新组建团队计划认为，对人员、经费预算、设备、学科服务进行监督仍旧是他们责无旁贷的任务; 同时认为，在过去的组织机构工作中有杰出贡献的同事可凭借他们的经验，推动团队向新的方向迈进，让他们自己朝着成为管理者的方向迈进。矩阵结构( 图 1) 将使人们通过部门主任和副馆长的指导而具备职业领导技能的机会。我们发现，在这新建的机构中，有 7 类人或团队可以直接或间接地向副馆长汇报工作的进展情况。

![图 1 职能团队的矩阵结构](image-url)
3.1 部门主任（图1，左侧圆圈）

由学科建设委员会担任，其职责是监督和管理部门的图书馆和职工，评议他们的工作业绩，管理经费的预算，制定学科领域的长期计划。部门主任向副馆长汇报工作进展情况，并且是用户服务领导理事会的会员。

3.2 职能团队负责人（图1，右侧圆圈）

由学科建设委员会的一名图书馆员担任，其一半的工作时间用于指导以下5个职能部门：（藏建设部、研究部门）研究和研究合作部和教学点）的运作。团队负责人需向大学图书馆长汇报职能部门领导的工作情况（部门50%的工作量），同时还需向部门主任汇报团队另外50%的职责相关（部门分工）工作。团队负责人在2年内要对其所负责的职能部门实施一个较为短期的目标。成员需提交申请并通过面试才能参加负责人选拔。该职能团队负责人是用户服务领导理事会的成员之一。

3.3 职能团队的成员

包括图书学科服务部的馆员和图书馆职工。他们从事的跨部门工作是其日常工作的一部分。职能团队的成员由自己决定在哪个职能部门工作，其任务是用20%的工作时间指导跨部门项目的实施，用80%的工作时间从事学科服务部的工作。职能团队的成员以职能团队学科服务部成员的职责，发挥其双向交流的作用。由于职能团队成员扮演的是双向交流的角色，并且要用其20%的工作时间指导跨部门项目的实施，所以要参与每位职能团队成员的工作业绩，都要写成书面评估。

3.4 咨询服务部的成员

包括相关的馆员和图书馆的职工，他们可以随时从职能团队调来承担咨询服务活动。由于有些图书馆的公共关系部和职能部门是向另一位大学助理图书馆员汇报工作进展情况，所以及时统一安排他们的工作就显得特别重要。咨询服务部的成员可根据相关小组的目标和讨论题目，决定是否参加职能团队，在时间安排上也不必和职能团队的完全一样。

3.5 用户服务领导理事会

是由职能团队负责人和直接向副馆长汇报工作的部门主任组成的一个团体。在讨论相关新部门的政策时，用户服务领导理事会的所有成员享有相同的发言权。职能团队负责人的任务是布置优先服务的事项，与基金提供者一起商讨和决定咨询服务部的方向，调整职能部门和其他部门的需求。职能团队领导小组的另一项任务是创建领导艺术和跨图书馆服务工作的文化氛围。

3.6 职能团队

由学科服务部成员和一名职能团队负责人构成，其任务是指导图书馆几个职能部门（藏建设部、研究部门）研究和研究合作部及教学的）中某个部门开展工作的方式方法，决定服务和的优先项目和各职能部门的指导政策。

3.7 学科服务部

是由图书馆各部门小组构成的，其组织结构比较松散，由各部门的主任担任组长。学科服务部的任务是促进职能团队的成员就某项特定研究和某个学科的教育方法提出建议，并提供支持该学科需求的服务。

4 创建矩阵的挑战与机会

确定任务后，战略计划制定团队便开始审查原有战略计划的修改方案，并且希望设立一个新的能有效解决问题和增加领导机会的新机构。为了使这个新机构能充分发挥其职能作用，领导需要和那些拥有财权与监督权的人以及各职能部门主管共同承担新机构充分发挥其职能作用的责任。解决与决策相关的变革和交流问题是可以实施的。在部门主任和团队队长面试时，所有候选者都要回答有关团队队长领导能力与领导艺术的问题，以及采用什么方法才能实施这一新领导模式的问题。另外，创建坚实的沟通文化氛围是用户服务领导理事会开展的一项新活动，其目的建立明细的工作规范——与团队一起工作的细则[3]。

另外一个挑战是创建组织机构的文化氛围，这是该组织机构所有成员所期待的一种领导艺术。各部门主任和副馆长推动了其单位内文化变革原则的制定，确定了定期召开会议讨论不同机构的职责、期待的文化氛围和所有团队成员期待的领导艺术的时间，从而使图书馆向着这一新的方向迈进。作为职能团队的一部分，该组织机构将获得在大型学术图
对组织结构的重新设计进行完全公正和客观的评价还为时过早。不过，其早期经验告诉我们，在变革文化方面，已经成功地实现了部分目标。我们将继续对重组矩阵结构进行评估和调整图书馆的战略计划。就我们未来的组织结构而言，根据学术界的工作方式，实施跨学科合作和改进领导艺术是我们要重视和解决的主要问题。

【参考文献】


[收稿日期:2017-12-31]

[本文翻译:王先林]