

# **UCLA**

## **Librarian Publications**

### **Title**

User Engagement - A Matrix Reorganization

### **Permalink**

<https://escholarship.org/uc/item/8wj331d3>

### **Authors**

Worsham, Doug  
Benedetti, Allison  
Consales, Judy  
[et al.](#)

### **Publication Date**

2020

# User Engagement

## A Matrix Reorganization

*Doug Worsham, Allison Benedetti, Judy Consales, Angela Horne, Nisha Mody, Rikke Ogawa, and Matthew Vest*

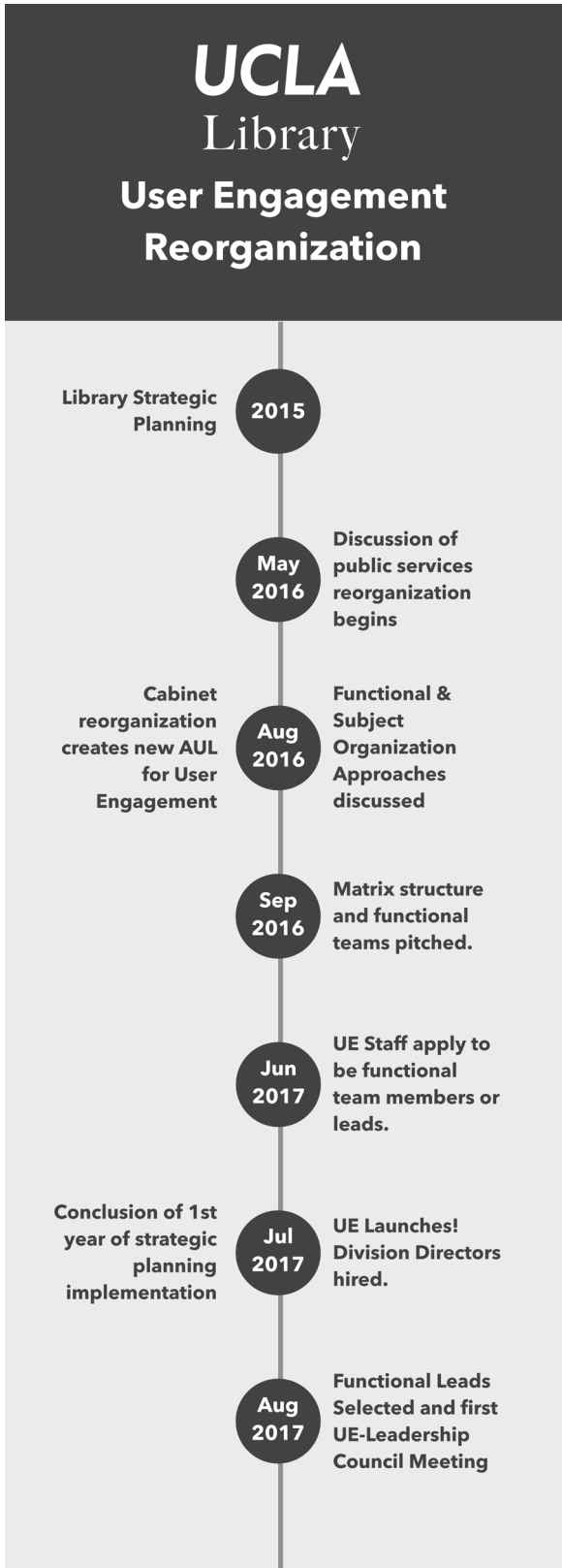
### Setting the Change Stage

UCLA is a four-year, public R1 research institution with an enrollment of 31,002 undergraduate students, 13,025 graduate students, and 1,401 interns and residents.<sup>1</sup> The UCLA Library employs 524 FTE, including 211 student FTE, and has multiple units and locations throughout campus.<sup>2</sup> The User Engagement division was established during a recent reorganization aimed at bringing together public-facing library services under one associate university librarian (AUL). This affected thirty-five academic and career staff across several libraries, including the Arts Library, Louise M. Darling Biomedical Library, Eugene and Maxine Rosenfeld Management Library, Music Library, Powell Library, Science and Engineering Library, and the Charles E. Young Library Humanities and Social Sciences Division; each of these libraries had differing existing administrative structures and norms. The establishment of User Engagement required those staff to combine and divide units as well as workflow processes in order to successfully integrate and scale public services for patrons. A year later, John Kotter's eight-step model of change provides an excellent framework to analyze the successes and ongoing challenges of the reorganization.

### I. Warm-up Phase

#### STAGE 1: ESTABLISHING A SENSE OF URGENCY

The transformation of academic libraries over the past decade has prompted debate on how to simultaneously maintain relevant service models and develop new approaches. At UCLA this debate has been further complicated by a history of decentralized public services and divergent visions and practices that have negatively impacted user experience and impeded collaboration across units. Frustrated by missed opportunities to connect silos many librarians and staff craved a clear vision, support for collaboration, and empowerment to move forward collectively. Ad hoc and pilot efforts in cross-location collaboration had been occurring for a number of years, though few had the institutional mandate to expand into universal adoption. Many staff recognized the cost of silos in terms of efficiency, user experience, priority setting, and staffing. Previous efforts to standardize had run into challenges in large part due



to competing reporting lines, uneven communication, lack of widespread buy-in, and insufficient resources. It was too easy for staff to default to the way they had always worked because each new initiative could be viewed as someone else's project or interest and not their own.

In 2015, revitalization came in the form of a new library-wide strategic plan that emphasized a team-based, collaborative approach to functional areas and called for the elimination of traditional location-based silos common for multi-location library systems.<sup>3</sup> An AUL departure and middle manager attrition had left Cabinet (the library's senior leadership team) stretched thin, impeding efforts to implement larger strategic initiatives. Cabinet recognized multiple urgent needs to reconfigure the portfolios of senior leadership, create a better structure for succession planning, foster new leaders, and enable innovation that would allow the library to grow. To address these issues, they created an improved senior leadership structure and a new portfolio, called User Engagement, that combined most public services under one AUL. At this point, the new AUL for User Engagement (AUL UE) began discussions with stakeholders about a strategy for reorganization (see figure 7.1).

**FIGURE 7.1**  
User engagement reorganization timeline

## STAGE 2: CREATING THE GUIDING COALITION

The primary goal in creating the guiding coalition for the reorganization effort was to recruit a diverse group of leaders and stakeholders from within public services, as well as other key partners within the library. In an effort to include wide representation, the AUL UE recruited a group of seventeen librarians and staff to serve as the UE planning working group. Eleven members of this group were internal to UE, and six were from library units reporting to other AULs.

When the working group was formed, the University Librarian articulated a vision of “One Library” across many locations, though the group was initially unsure about how to translate this vision into an organizational chart. The working group also had a set of pre-established objectives that set the boundaries and scope of its efforts. These included the desire to create opportunities for professional growth and leadership; resolution of an unsustainable interim reporting structure; recognition of the connections between UE and the rest of the library; and interest in minimizing the amount of disruption for affected staff.

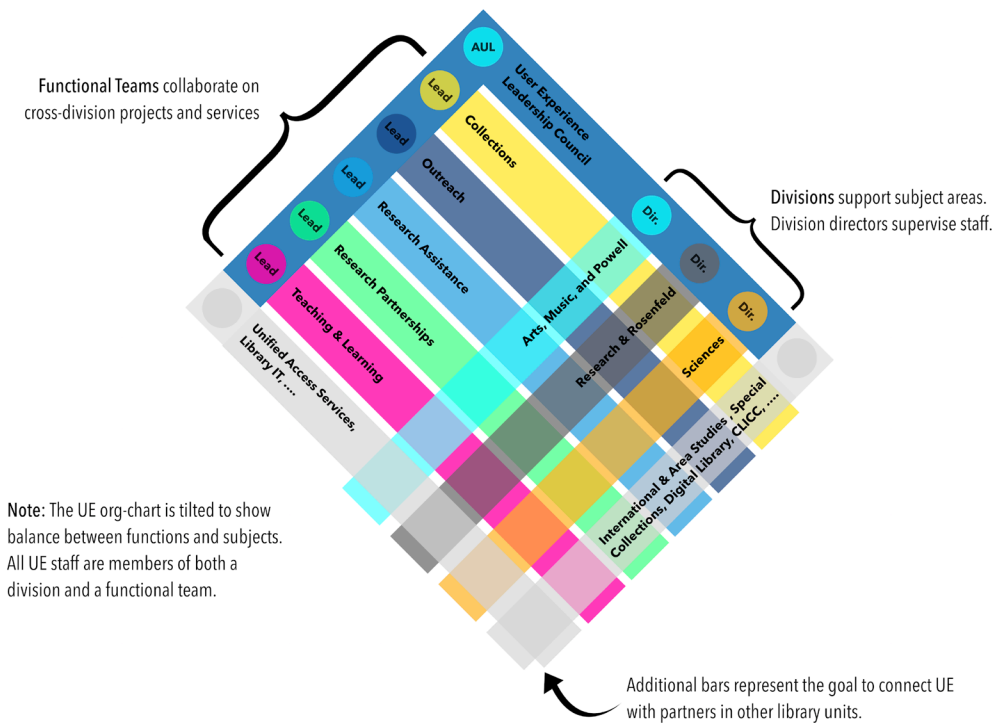
These parameters still left several areas open to negotiation and allowed the working group to explore a number of possible approaches to creating an organizational chart. The group was also able to develop various approaches for how the reorganization effort could contribute to the “One Library” vision. These included a desire for an improved user experience, more efficient coordination between units, and increased capacity for new services. The development of this shared vision was not always easy or automatic, and it quickly became clear that the group had varying and even contradictory ideas and approaches to effective management, leadership, and teamwork for UE. This diversity of opinions is what the AUL UE had hoped for, in that it reflected the varying backgrounds and experiences of the working group members. The working group found itself struggling to answer a number of challenging organizational questions:

- Should we continue to be organized geographically, by subject, or would a functional approach lead to improved coordination of services?
- How do we divide staffing and designate reporting lines? What impact will this have on staff office locations?
- What degree of hierarchy is needed? Could we use this reorganization as an opportunity to flatten hierarchical structures and foster leadership among all UE staff? Is it possible to lead effectively even if you are not a supervisor?

The constructive tension that resulted from these challenging discussions had costs and benefits. At times it seemed as if factions might be developing within the working group, particularly with respect to geographical versus functional approaches. Some suggestions had personal implications in that areas of authority and responsibility might change as a result of the reorganization. At the same time, the group as a whole had an increasingly shared desire to try something new, and there were signs of progress toward a workable solution. Time for creative thinking in between meetings was essential at this stage. Individual brainstorming, as well as ideas generated through informal conversations after meetings, frequently moved the process forward. In many ways, these ideas, when brought back to the group as a whole, generated the most significant breakthroughs.

### STAGE 3: DEVELOPING A VISION AND STRATEGY

Several breakthroughs moved the group towards its ultimate vision for UE. One of these was an exercise to analyze how three proposed organizational structures—subject-based, function-based, and the existing structure—could help UE address a number of known challenges, which included budget allocations, interdisciplinary support, and sustainable services. Each group found pros and cons to its organizational style with no one proposal emerging as the ideal solution. Influenced by other institutions' efforts and the “One Library” vision, group members started working on organizational charts. Using scenarios, the group discussed pros and cons, and over time members coalesced around five primary functional teams and three subject-based divisions. A matrix organizational structure in which staff serve both on a functional team and in a subject-based division became the proposed model for User Engagement (see figure 7.2). Such matrix structures have roots in project management and have been used to leverage project leadership activities while centralizing administrative responsibilities external to the project team.<sup>4</sup> The working group also discussed the potential for the matrix structure to provide opportunities for more staff to develop leadership skills through teamwork and knowledge sharing.



**FIGURE 7.2**

The User Engagement matrix organizational chart

At this point, the University Librarian attended a working group meeting and gave her input on the proposed matrix model. After receiving positive feedback from the University Librarian, the group shifted focus from idea generation to questions of

implementation: Could this work? Would it help create a more formalized coordination of public services across locations? Would it adequately account for discipline-specific needs? Would the divisions have equal staffing? Could we agree on the number and scope of functional teams? Could we agree on priorities? These questions came at a critical time and inspired group members to work together to create the new organization.

## **STAGE 4: COMMUNICATING THE CHANGE VISION**

The working group members varied in the amount and type of information they shared with their peers. Some engaged in active discussions about the pros and cons of possible changes; others simply reported out, occasionally without a great deal of specificity. Staff reactions and engagements were also highly variable. Some staff were skeptical while others were curious and excited about what opportunities a new approach might bring. In addition to face-to-face communication strategies, the group kept all documentation in an open organizational wiki for staff member review. This prompted both planned and spontaneous conversations.

Once the working group had coalesced around the matrix, the proposed structure for the organization was shared with all UE staff. The AUL UE, equipped with the matrix organizational chart and the proposed charges for the functional teams and divisions, embarked on a series of meetings across the library to talk about the vision for her new portfolio. Cabinet endorsed the proposed changes, and the library's Management Council, comprised of the library's middle managers and senior leadership, expressed interest and support and shared their questions about how units outside of UE would interact with and participate in activities and initiatives. In response, the working group added these stakeholder groups to the left and right edges of the organizational chart in order to illustrate UE's goal to connect with partners in other library units. Continuing the communication efforts, the AUL UE went to department meetings for the affected units and spoke at an all-library staff meeting.

The working group members were also part of communicating the vision. The final plan included choices and compromises that meant several staff members would face significant changes in job responsibilities, creating some anxiety. The group tried to be open and provide opportunities for discussion at staff meetings, in individual conversations, and on the organizational wiki, but later feedback indicated that some staff felt this was insufficient. In general, communication was a challenging part of this process. These struggles were indicative of some of the issues that UE sought to address—silos, lack of agreement about priorities, and inadequate leadership.

## **II. Introducing New Practices Phase**

### **STAGE 5: EMPOWERING BROAD-BASED ACTION**

Fostering ongoing opportunities for leadership and staff engagement and empowering broad-based action were important goals of the UE reorganization. The new organizational structure called for eight new leadership positions: three division directors and five functional team leads. These open positions offered staff unprecedented opportunities to consider themselves as potential leaders in a newly integrated organization. In part to facilitate ongoing opportunities for leadership development, the working group

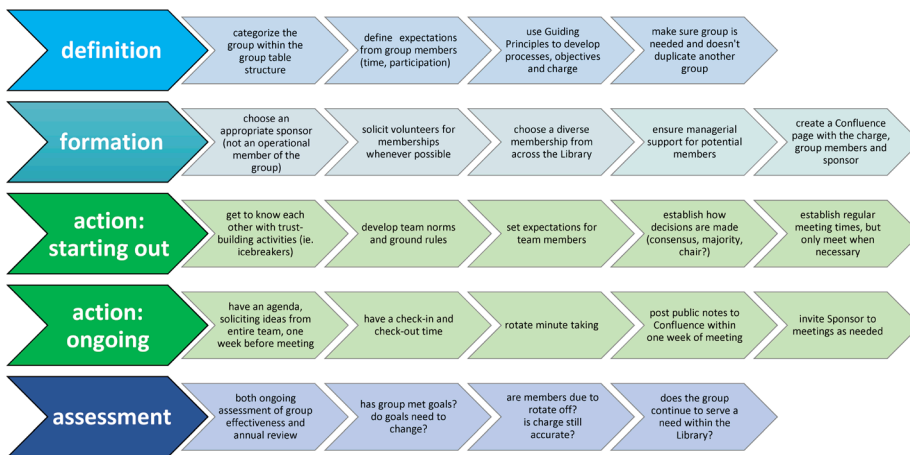
decided that functional team leads would rotate every two years, meaning that over time UE staff would have multiple opportunities to take on leadership roles in the organization. While some considered this approach empowering, others asked questions about fairness and equitable access to leadership:

- What if multiple qualified people apply for the same functional lead position? If this happens, are co-leads an option?
- Are leadership positions truly open to all UE staff, or are they open only to librarians? If functional team leads rotate, should division directors rotate as well?
- If some leadership positions rotate and others do not, does this create a power imbalance?

These questions remain relevant as UE works to become an organization in which all members are empowered as team members and leaders.

Each of the functional teams and divisions utilized a set of best practices for team formation developed as part of the library strategic plan. The best practices (see figure 7.3) included five stages, from team definition and formation to decision-making and assessment. Key steps emphasized establishing norms and articulating roles and responsibilities. Though lengthy, this process laid a foundation for a new organizational culture and prepared UE as a whole for team-based collaboration.

### Team Formation Best Practices (UCLA Library Strategic Plan, 2015)



**FIGURE 7.3**  
Team formation best practices

One of these early actions was the establishment of a quarterly all-UE meeting designed to promote active, open, and creative conversations among all staff, including those who were typically less engaged in the past. These meetings are participatory and have helped members identify areas for change and improvement for UE as well as the whole library, including encouraging a risk-taking culture, determining the top



priorities for UE's first year, and brainstorming how to create time and energy for new initiatives.

Feedback gathered after the meetings indicates that staff have appreciated the opportunities for connection, the intentionally designed activities, and the ability to provide ideas for improvement:

Great to hear about what my colleagues are up to and seeing everyone in person.

Lots of people talking and doing initial self-reflective work with specific current and future actions was practical and hard to do, but sort of essential to a good faith effort to improve the library.

If the topic is going to be self-reflective, then give continued homework for us to dig a little deeper. This was nice but I'm not sure people got to the point of recognizing individual need to change bad behaviors.

In order to provide multiple ways for staff to address these important topics, divisions and functional teams debrief the meeting to allow for more intimate and specific conversations. Fostering critical organizational conversations multiple times and in multiple venues has been essential to UE's efforts to empower broad-based action.

## **STAGE 6: GENERATING SHORT-TERM WINS**

User Engagement's reorganization has been more than just a restructuring of library units and reporting lines. Throughout the process library staff spoke up about long-standing organizational needs to build community, improve workplace culture, foster constructive collaboration, and build more sustainable service models. Addressing these needs resulted in some short-term wins that built momentum during UE's first year.

Successful community building within UE has involved both large group conversations and opportunities for staff to connect, engage, and collaborate in smaller settings. One early experiment in community building has been Open Mic events, hosted by UE's functional teams. The events are designed to encourage easy and informal idea sharing across the whole library and are different from a traditional brown-bag or staff seminar in that they encourage staff to discuss ideas at any stage of development, without the expectation of preparing slides or formal presentation materials. The format is open, meaning anyone can share an idea related to the theme. For example, staff have shared teaching activities, approaches to reference interviews, new ideas for campus outreach, and collections strategies. At Open Mic events staff have also shared questions and challenges they are facing, which has helped to establish these events as venues for conversation, and even vulnerability. This concept, initially generated by one functional team, gained traction when it was embraced by all of the functional teams. Furthermore, attendees from across the library have provided very positive feedback and encouraged UE to continue offering these community-building events.

Quality communication and opportunities to build emotional intelligence are key success factors in a matrix organization.<sup>5</sup> As a result, divisions and functional teams have



been concentrating efforts on building connections between staff inside and outside of UE. The divisions have focused on team building by encouraging “shout-outs” at team meetings, hosting tea time for staff, and giving staff time to share and learn about their colleagues’ work. Functional teams have made progress building campus partnerships, improving library-wide workflows, analyzing service structures, and fostering communities of practice. These short-term wins are improving services, building shared understanding, and strengthening community across UE.

## **STAGE 7: CONSOLIDATING GAINS AND PRODUCING MORE CHANGE**

In addition to these achievements, changes in communication practices have been a driver and key component of UE culture, feeding into refreshed views when tackling historic organizational challenges. Throughout the process UE leaders focused on improving transparency through open communication tools, more frequent updates, and increased opportunities for feedback. As with most reorganizations and culture changes, there was complacency and occasionally resistance. Responding thoughtfully to different perspectives and ensuring people felt safe to share opinions honestly was critical to keep momentum moving forward. Further, the increase in open communication, especially in larger meetings, has encouraged colleagues to propose constructive changes to long-held traditions rather than viewing them as impossible to change. In a variety of settings, UE staff have shared their ideas on important areas, including staff review and evaluation, support for leadership development, the review of long-standing services, and new collection development practices, to name a few.

The positive feelings about the promise of the matrixed structure also prompted consideration of the benefits of a more integrated role for scholarly communications (a separate department) in UE initiatives. As a result, about six months into the reorganization, discussions began about folding those librarians into UE. While this integration was ultimately decided against, it is evidence of the influence of the work being done in UE and its potential to foster new approaches to traditional library functions. The collaboration between these groups continues to grow, regardless of the administrative structure, including a cohosted workshop on scholarly communications and the ACRL Framework for Information Literacy for Higher Education.<sup>6</sup>

This year librarians and staff have been increasingly interested in talking about broad issues of librarianship, such as the role of liaisons and how to build collections as a system. Various non-UE units have expressed desire to engage with UE-led initiatives, and library staff members are now better positioned to build on relationships and collaborations with non-library groups across the university. Current initiatives include workshops on advanced research tools and methods, accreditation review, and shared support services for undergraduate research.

Three librarian searches immediately post-reorganization offer further evidence of forward momentum. Previously, searches would have been administratively siloed with a single general invitation to staff outside of that division. This time, the breadth of the new UE structure informed the formation of the search committees as well as interview schedules. Each interview included an all-UE session where candidates met representatives from each functional team and division and were asked prepared

questions about how they would contribute to the variety of functions in the UE structure; conversely, finalists received answers to their own questions from a broad swath of UE. Staff members across UE were invited to meetings and meals to demonstrate a unified, multifaceted organization.

Reflecting upon issues of momentum and change, it is worth noting that UE members have varied backgrounds and tenures. Some have been at UCLA for many years and have experienced numerous structural changes. Others have joined the organization within the past few years. It has been valuable to see the process through beginner's eyes, with enthusiasm reinforcing forward momentum. At the same time, those with more tenure provide historical knowledge to inform decision-making and a strong desire to work on long-entrenched challenges. Diversity of experience and viewpoint will be an asset moving forward as UE teams articulate service priorities, develop new initiatives, and improve succession planning.

### III. Grounding Phase

#### STAGE 8: ANCHORING NEW APPROACHES IN THE CULTURE

During the initial year of the new UE structure, much has been accomplished by everyone within UE. The opportunities ahead are wide-ranging and the early lessons substantial. Cultural change takes time and UE leaders are committed to making this new organization as successful as possible. Easily visible ways to anchor this change include bringing transparency to previously obscure processes, while more nuanced methods are discernible in casual conversations between colleagues who might otherwise not have crossed paths.

Leaders at all levels of UE (and outside) are working together to further collaborative, positive successes and move away from the siloed perspectives of the past. Negative conversations that veer toward “We’ve tried that before and it didn’t work” or “Why do I need to do things differently?” are being constructively reframed. Important conversations are more often treated as learning moments for everyone—not just as conversations between managers and staff. Further, UE members continue to improve processes and learn from one another. Hiring is more standardized and candidate interviews involve a broader representation of voices across all sessions. The User Engagement Leadership Council (UELC) developed decision-making criteria that clarify how simple and complex decisions are made and documented. Teams and divisions are taking increasingly coordinated approaches to public services and working together on a wide range of projects and initiatives. In short, although the current UE members can’t change the past, all are motivated to help move the organization in successful directions.

As UE members continue to form and improve the organization, some aspects of the change are not yet anchored. It is important that there has been confusion about the role and purpose of the UELC, which brings together the AUL UE along with division directors and functional team leads. Part of the challenge has been that UELC, the five functional teams, and the three divisions all started more-or-less simultaneously, and at a time when staff had services to deliver and active projects to manage. In retrospect, the reorganization would have benefitted from more time during UE’s early formation to flesh out core processes and delineate expectations, perhaps with the assistance of a consultant. Instead, UELC’s work was sometimes muddled with that of the functional

teams and divisions, and it has been unclear whose leadership is primary for some conversations. The need to begin fall quarter services impacted the ability to complete an ideal plan before implementation as UELC members were directly involved in public services roles.

UE's work is further impacted by historical issues that have persisted at UCLA and are still in play, including the lack of shared understanding of liaison roles in the twenty-first-century academic library; differing opinions on levels of emphasis for various user groups such as faculty, professionals, graduate students, and undergraduates; competitiveness between groups seeking financial and staffing support; and challenging interpersonal dynamics.

As the organization moves forward, UELC will need to develop a clear process for leadership cycling. Functional team leads were selected for two-year appointments; this was a deliberate decision to allow for a rotation of new leaders to gain experience, bring new ideas, and address succession planning. Functional team membership was self-selected by library staff with the understanding that the commitment was for a two-year term. This cycling of leadership and membership provides a unique opportunity to bring new perspectives and for staff to explore new professional directions. The ability to honestly reflect upon successes and challenges made during the first cycle will be essential to restarting the cycle of change with the first step, reviewing norms and culture.

## Analysis and Conclusions

Although the Kotter framework was not a tool used in this organizational change, revisiting the process through Kotter's linear progression of stages helped the authors reflect on and better understand UE's reorganization. That said, this reorganization effort was more cyclical than linear. At times, it felt as if the UE reorganization was simultaneously in Stage 4, trying to communicate the vision, while also cycling back to the previous three stages because not all stakeholders were in the same place. Stages 1 through 4 of the reorganization planning were conducted mostly among the UE working group, while Stages 5 through 8 involved all of User Engagement and staff in other units of the library. This meant that in order to create meaningful change by bringing all parties into the process, staff had to move through the stages depending on the varying needs of teams, divisions, and individuals. The later stages of the process were cyclical as well. Reflection on Stages 5 through 8 highlights their interdependencies—remove an obstacle, achieve a short-term win, build from there, and then often start again. This is noteworthy because User Engagement cannot succeed by functioning in isolation; as a piece of a larger organization, it is critically dependent on other library units. Finally, revisiting this change through the Kotter framework has highlighted the importance of Stage 8: anchoring cultural change. For UE, cultural change is ongoing as staff come and go and as other parts of the UCLA Library change as well. User Engagement's new approach to its people and their work is about creating an evolving team-based environment that encourages experimentation and allows everyone to lead and develop new skills. In this respect, for UE, Stage 8 is not an anchor. Instead, it is a launchpad for revisiting multiple stages of the organizational change process as UE works toward the goal of creating an innovative and collaborative culture.

## Notes

1. "Enrollment," UCLA Academic Planning and Budget, accessed May 25, 2018, <https://www.apb.ucla.edu/campus-statistics/enrollment>.
2. "Administration and Organization," UCLA Library, accessed October 1, 2018, <http://www.library.ucla.edu/about/administration-organization>.
3. "Strategic Plan 2016–19," UCLA Library, accessed October 2, 2018, <http://www.library.ucla.edu/about/administration-organization/strategic-plan-2016-19>.
4. Mihály Görög and Nigel J. Smith, *Project Management for Managers* (Newton Square, PA: Project Management Institute, 1999).
5. Thomas Sy and Stéphane Côté, "Emotional Intelligence: A Key Ability to Succeed in the Matrix Organization," *Journal of Management Development* 23, no. 5 (2004): 437–55, <https://doi.org/10.1108/02621710410537056>.
6. "Framework for Information Literacy for Higher Education." Association of College and Research Libraries. Accessed July 27, 2019. <http://www.ala.org/acrl/standards/ilframework>.

## Bibliography

- Association of College and Research Libraries. *Framework for Information Literacy for Higher Education*. Accessed July 27, 2019. <http://www.ala.org/acrl/standards/ilframework>.
- Görög, Mihály, and Nigel J. Smith. *Project Management for Managers*. Newton Square, PA: Project Management Institute, 1999.
- Sy, Thomas, and Stéphane Côté. "Emotional Intelligence: A Key Ability to Succeed in the Matrix Organization." *Journal of Management Development* 23, no. 5 (2004): 437–55. <https://doi.org/10.1108/02621710410537056>.
- UCLA Academic Planning and Budget. "Enrollment." Accessed May 25, 2018. <https://www.apb.ucla.edu/campus-statistics/enrollment>.
- UCLA Library. "Administration and Organization." Accessed October 1, 2018. <http://www.library.ucla.edu/about/administration-organization>.
- . "Strategic Plan 2016–19." Accessed October 2, 2018. <http://www.library.ucla.edu/about/administration-organization/strategic-plan-2016-19>.

