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## Anything Can Happen in The Zone

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# ANYTHING CAN HAPPEN IN THE ZONE

Library and Departmental Change Driven by Migration to a  
Cloud-Based Library Management System

November 28, 2017

Josh Petrusa

Associate Dean for Collections & Digital Services

BUTLER UNIVERSITY





# Responsibility to Users

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## Need Help?

***The library can help you succeed.***

Studies indicate students who make use of library resources and services have higher retention rates and GPA.



Krista M. Soria, Jan Fransen, and Shane Nackerud, "Library Use and Undergraduate Student Outcomes: New Evidence for Students' Retention and Academic Success," *Portal: Libraries and the Academy* 13, no. 2 (2013): 147-64.



# Change: Ever Thus

Freeman Memorial

CL News Citizen 23 March 1977



## Library gets typewriters for students

CLEAR LAKE — The students' need for typewriter use within the library has been met by placing a new SCM Model 120 typewriter in Freeman Memorial Branch Library, Clear Lake City.

The typewriter is coin-operated. The nominal charge is ten

cents for twenty minutes or twenty-five cents for one hour.

The SCM Model 120 features electrically operated keys, jeweled main bearing, wide carriage, five automatic electric repeat actions, copy set adjustment (gives up to ten carbon copies),

and a half-space key for clear corrections and line justification.

The typewriter has a manual return and a touch control which allows the typist accustomed to a manual change to electric typing with ease. This additional lib-

rary service is the latest in a continuing series of additions provided by the Friends of Freeman Memorial Library.

Similar typing facilities at other leading educational institutions have been warmly welcomed by students, who can now

take notes or prepare papers in the library with suitable reference works directly at hand.

Students find that the transition from manual machines to electric machines is done with ease, and that the superior appearance of the electrically typed page is beneficial to them.

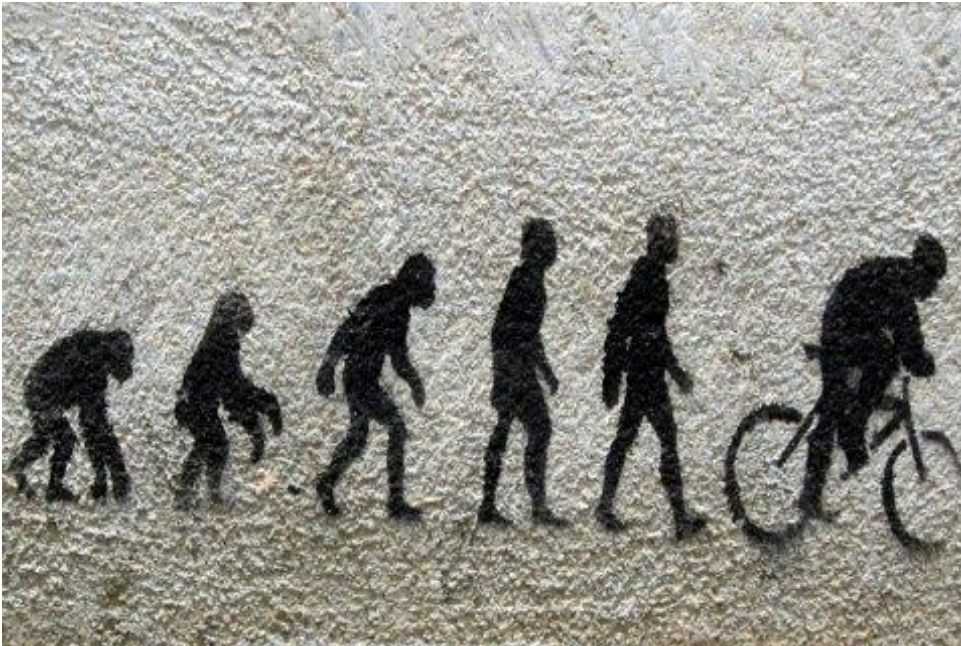


Is that the library in your pocket?  
(and yes, we are glad to see you)



# Why the ILS?

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Migration to a new kind of ILS should allow libraries to do new & different things.

# How Do We Get There?

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- Embrace new technologies
- Facilitate adoption by staff
- Plan for both organizational, and personal level support
- Abandon (or scale back) legacy services and workflows



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# HISTORY

(literature review, arguments, etc.)

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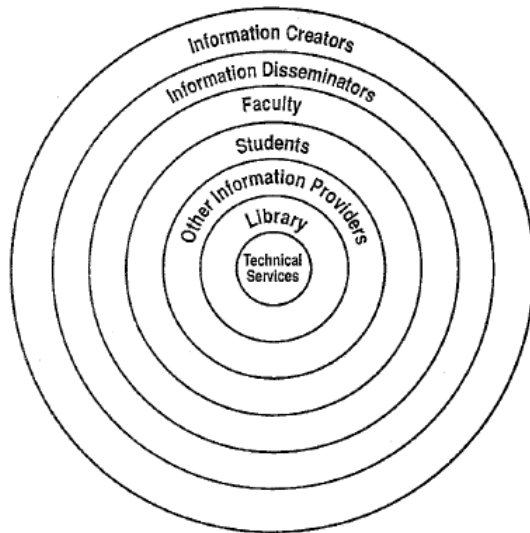
# ILS Migration – who will this affect?

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FIGURE 1

## PTOLOMEIC VIEW



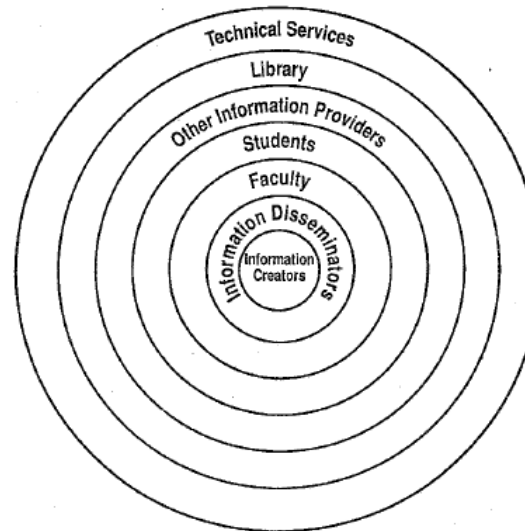
world revolves around library technical services, nonetheless it is dangerous to move outward from the specific to the general. Technical services is not the center of the library world, nor are libraries the center of the information world. If nothing can occur at the outer edge of the information world without revolving around some action library technical services takes then libraries would dictate developments in the information world rather than respond to those developments.

By contrast, a Copernican (or "external") world view puts the information creators at the center of the information universe (see Figure 2).

In this view, technical services is one of many information organizers and providers. The library exists in one of the outer orbits. This view illustrates that libraries and their operations not only work with the general public, university faculty, and administra-

FIGURE 2

## COPERNICAN VIEW



Hirshon:  
 "While it is reassuring to library staff to think that the information world revolves around library technical services ... it is not the center of the library world, nor are libraries the center of the information world"

FIGURE 4. Technical Services Organization Chart (1975)

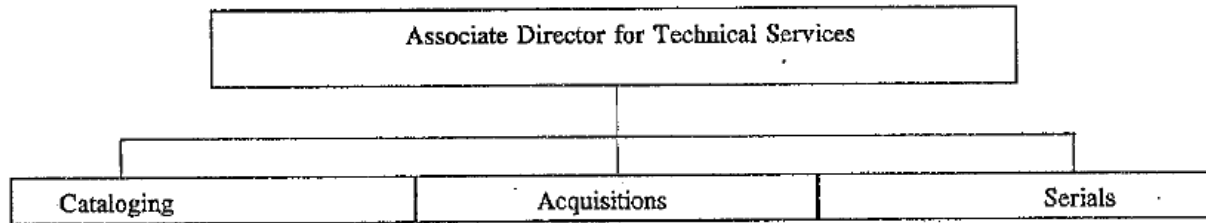
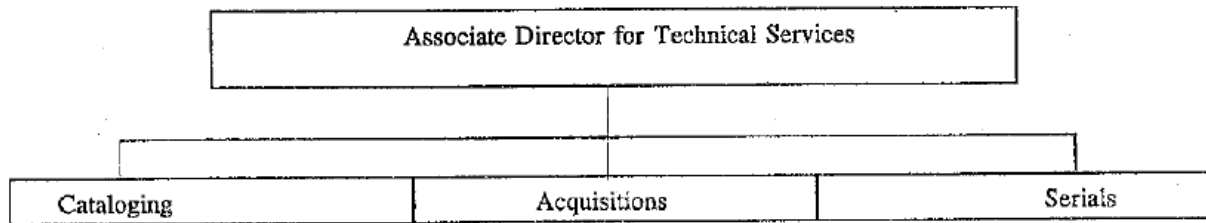


FIGURE 5. Technical Services Organization Chart (1991)



2003? 2010? ... 2016?

# Library Org Chart should ... (Hirshon, 1991)

- Reflect alliances with other information providers on campus
- View the library from the outside in, stressing direct services to the user rather than internal operating procedures
- Decentralize processing operations to their related public service
- Be dynamic, with annual fine-tuning
- Reflect a new level of sophistication in integrating technology into the organization



## Library Org Chart should ... (Hirshon, 1991)

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- Reflect alliances with other information providers on campus
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  - Decentralize processing operations to their related public service
  - Be dynamic, with annual fine-tuning
  - Reflect a new level of sophistication in integrating technology into the organization
- IT, Honors, Library work on theses
  - Consolidation of service points to simplify for users
  - Or, locate where it needs to be
  - Every opening requires an adjustment
  - New ILS tech, new procedures



# “Knowledge Access Management” (Koh, 2000)

Libri, 2000, vol. 50, pp. 163-173  
Printed in Germany - All rights reserved

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Libri  
ISSN 0024-2667

## Knowledge Access Management: The Redefinition and Renaming of Technical Services

GERTRUDE S. KOH

Graduate School of Library and Information Science, Dominican University, River Forest, IL, USA

The context and environment for library technical services may be best described by the examination of influencing factors, which shape and direct these services. Of these factors, the dominant current forces – economic pressures (i.e.,

budgetary constraints), user expectations, and technology – affect how technical services are changing and converging, thus requiring a new definition and renaming. Knowledge access management is presented for consideration.

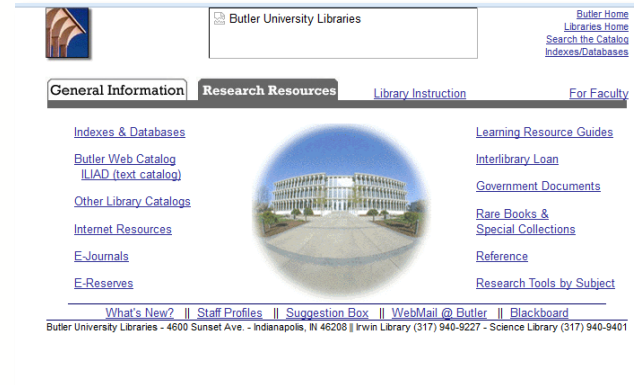
### *The need for redefinition and renaming*

A renaming and a new definition for library technical services in the briskly changing world of libraries as information systems are urgently needed. The need for the redefinition and the renaming of technical services stems from these

ferred through DIALOG and other such online databases. A more definitive shift from housing holdings to accessing remote resources is evident more recently. The World Wide Web has begun to facilitate the delivery of Internet resources by bundling all different formats, such as text, graphics, and sound, in cyberspace. The conceptual

Gertrude S. Koh, “Knowledge Access Management...” Libri 50, no. 3 (2000):163-173.

“The shift from passive information provision to active knowledge access management ... must be undertaken if successful adaptation and adjustment of the profession is to occur in these changing environments”



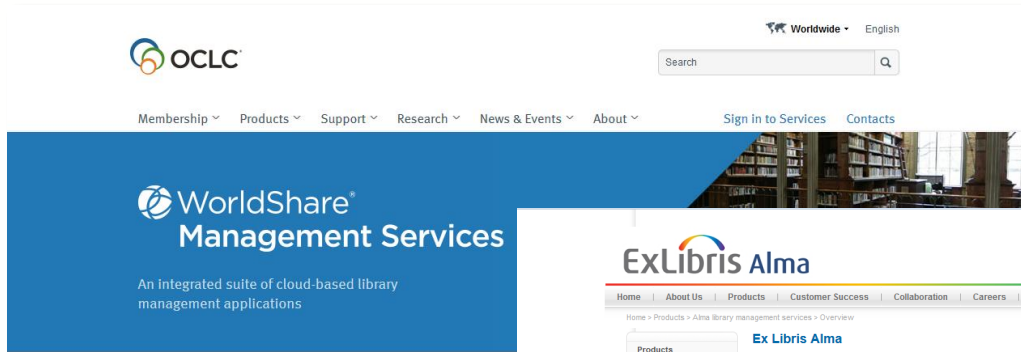
# Forces inspiring change

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- Departmental merger driven by campus-level budget cuts (Doherty & Piper, *Tech Serv Qrtly*, 2015)
- Restructuring because e-access support suffered due to imbalance of staff, most of whom were dedicated to long-standing practices in book acquisition & maintenance (Miller, Sharp & Jones, *Collection Management*, 2014)
- Especially in ARLs, tech serv staff have become highly involved in IR activities, but departments were not re-organized as a result (Connell & Cetwinski, *Tech Serv Qtrly*, 2010)



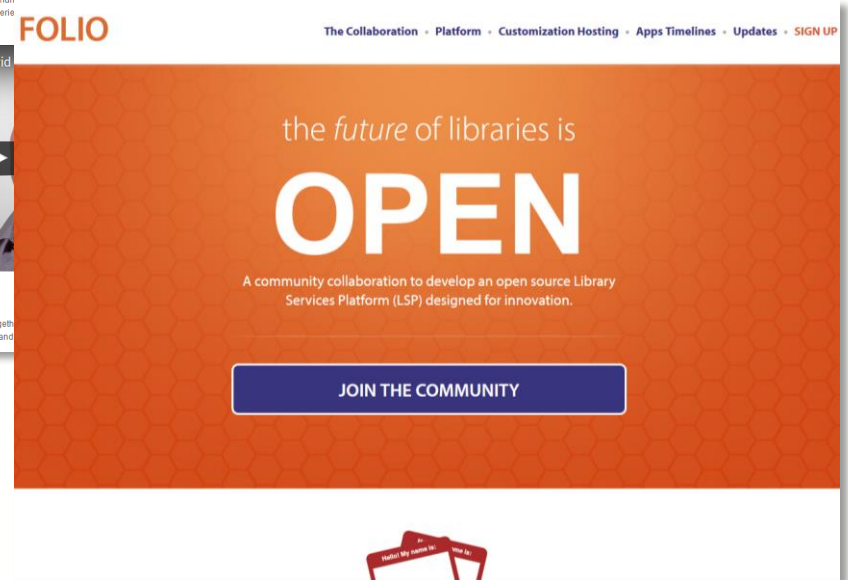
# Web-Scale (Next-Gen) Library Management Systems



Save time and money. Improve service to users.

Faced with scarce resources, changing user needs and increasing collections and systems, libraries are looking for new ways to save money while improving service to their users. By sharing data across many member libraries, WorldShare Management Services

- Large-scale technology platforms
- Applications delivered using multi-tenant SaaS
- Massively aggregated approaches to data
- Highly cooperative arrangements among participating libraries

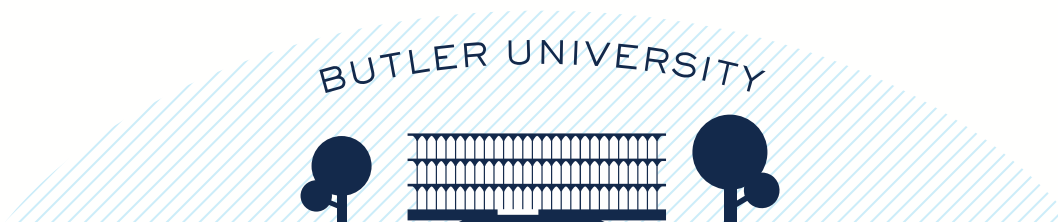




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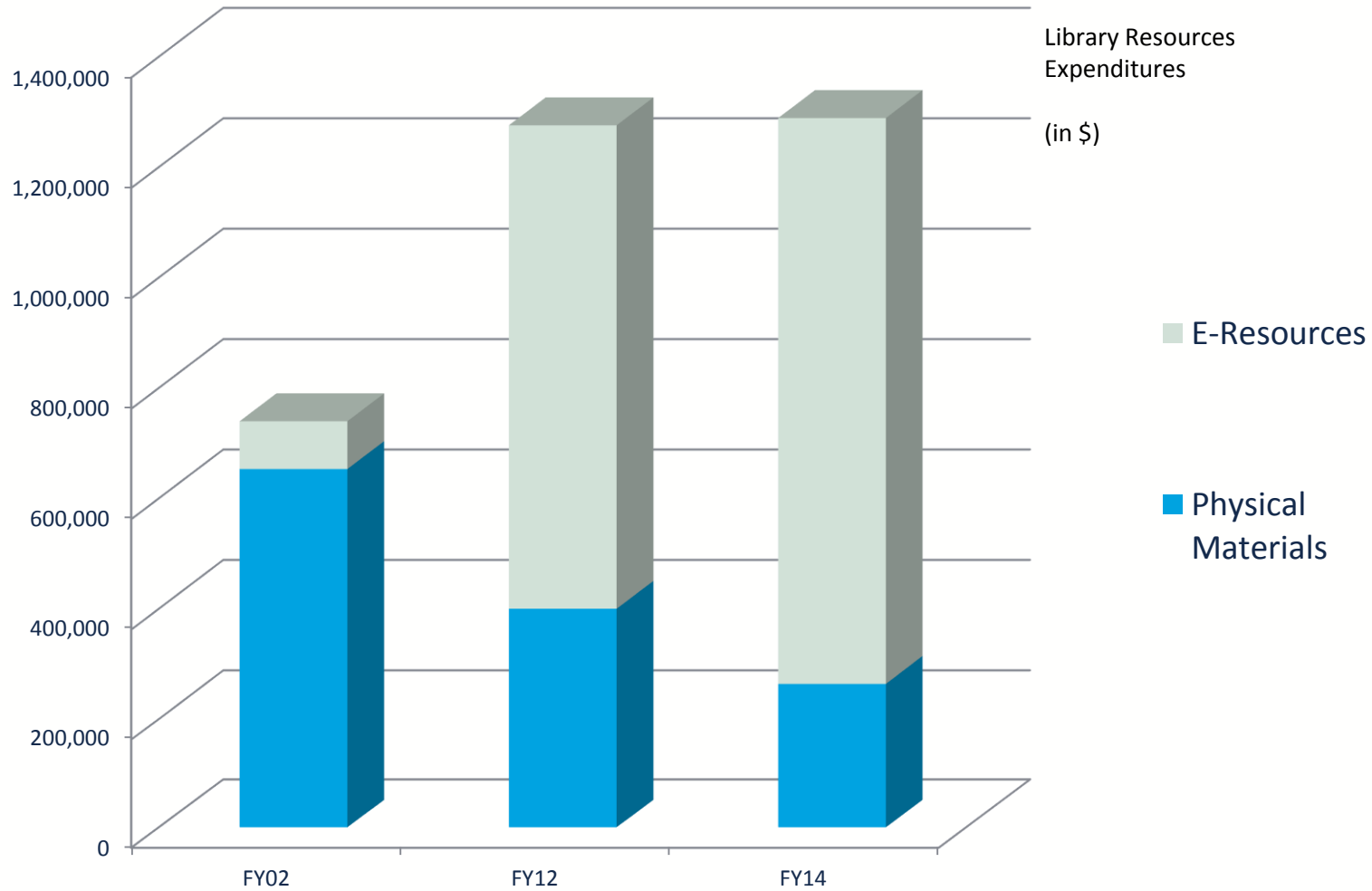
# PALNI, BUTLER, ETC.

Why change now?





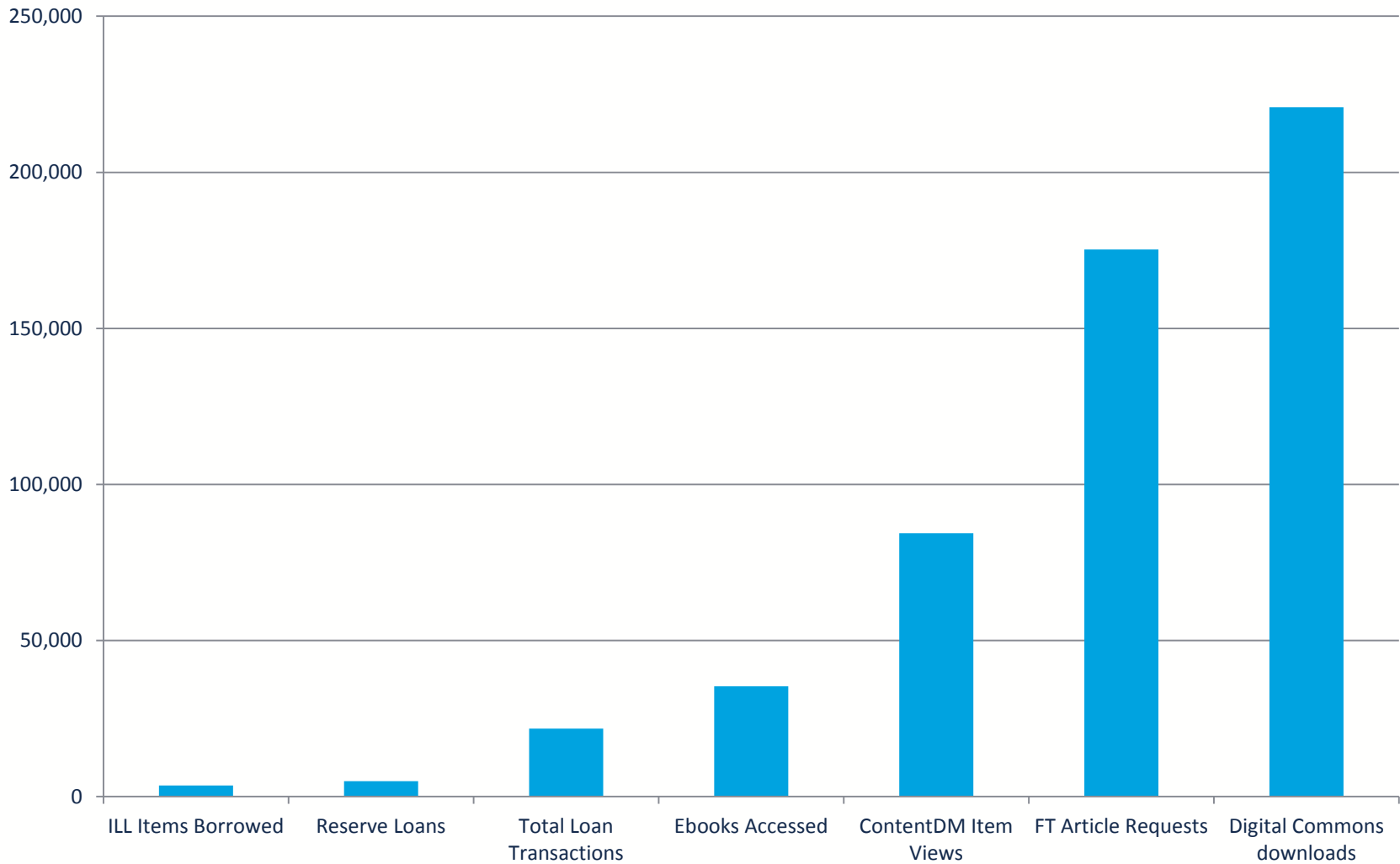
# Changed Priorities



# Changed Priorities

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## (Local Context)

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- PALNI Consortium
- 23 Private Institutions
- First Academic Library group to select WorldShare Management Services
- Selection Summer 2013
- Implementation 2013-14



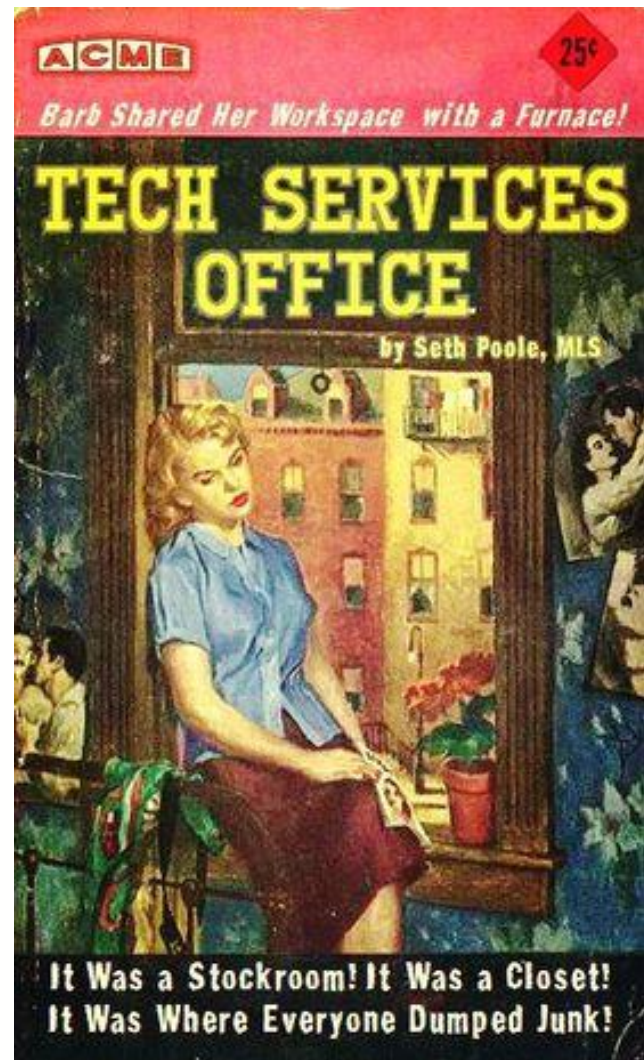
## (Local Context)

- 50<sup>th</sup> Anniversary of Irwin Library (2013)
- New Dean of Libraries (2012)
- Strategic Planning Process
- (migration, too)



# Migration Driving Change

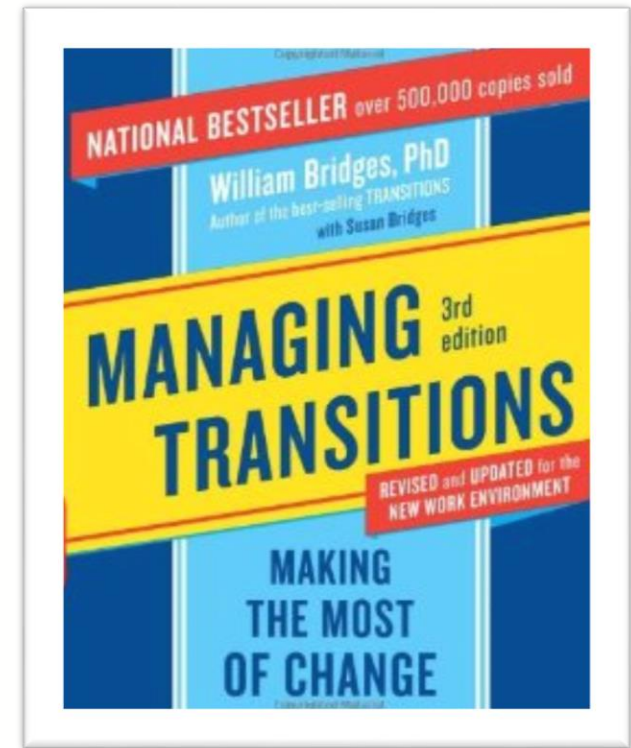
- Traditional departmental units
- Increasing budget share to online resources
- Activities still print-centered
- Long-tenured staff



# Recommended Reading

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- Bridges: “holding onto familiar practices will leave organizations out in the cold, while more savvy competitors move ahead.” (ix)
- Bridges: organizations face transitions due to mergers, technology, or business model changes
- Koh: factors driving change in libraries include economic pressures, user expectations, and technology





**“It isn’t the changes that do you in...”**

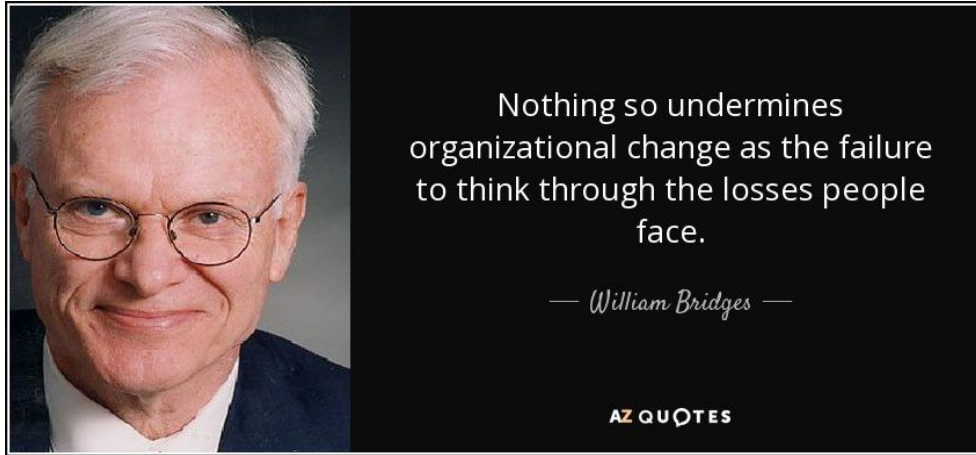
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**Transitions.**

**Understand this is an experience that all staff will experience differently; communicate the goals.**

# Reflect, Say Thank You, Grieve



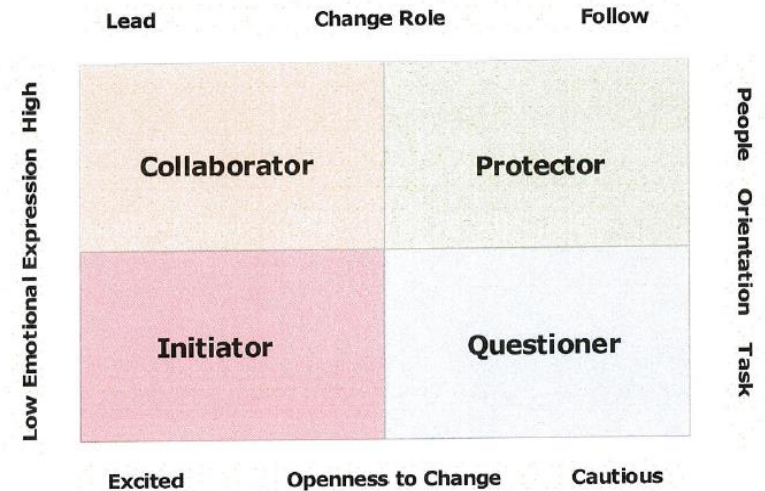
## Change Style Map

Change Role: Preferred role during change

Orientation: Focus during change

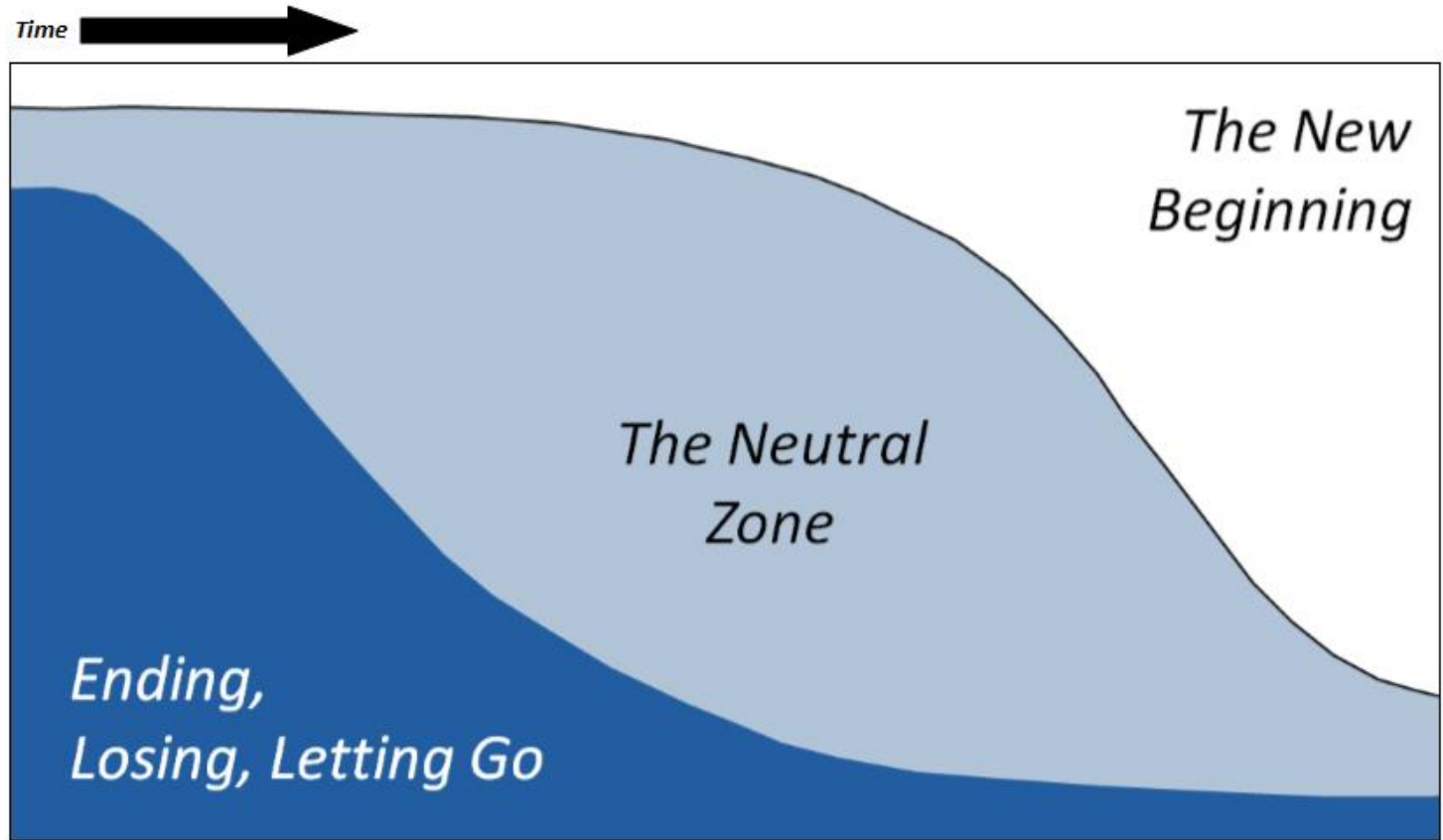
Openness to Change: Attitude about change

Emotional Expression: Degree of emotion expressed during change



Change Style Assessment from The Ryan Group:  
<https://ryangroup.contentshelf.com/product?product=11302250000013BE>

## The Three Phases of Transition



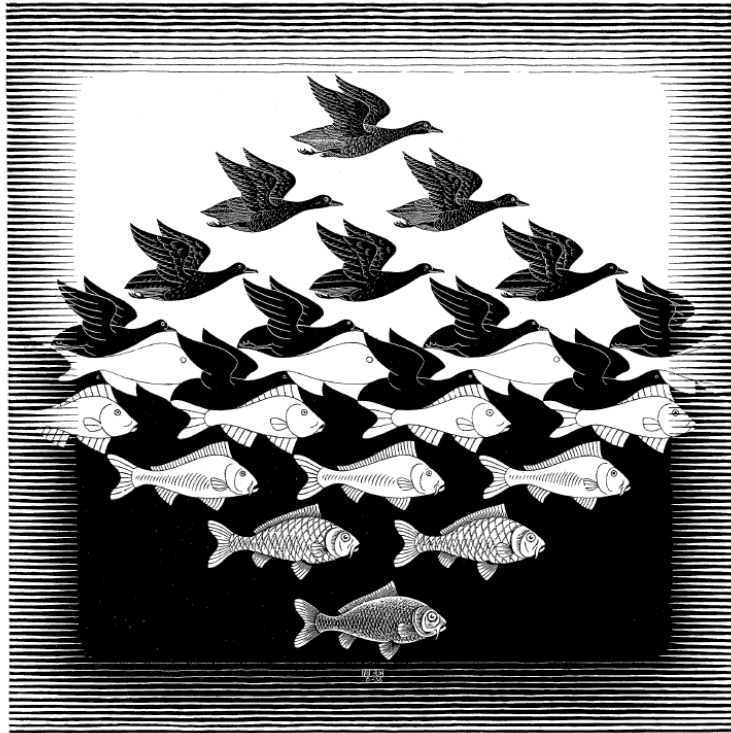
*Phase 1. ENDING:* Letting go of old ways and the old identities within the organization.

*Phase 2. NEUTRAL ZONE:* The in-between time when the old is gone but the new isn't fully operational; the critical time for psychological realignment and re-patterning.

*Phase 3. NEW BEGINNING:* Coming out of transition; the time for developing new identity, experiencing new energy, and discovering a new sense of purpose.

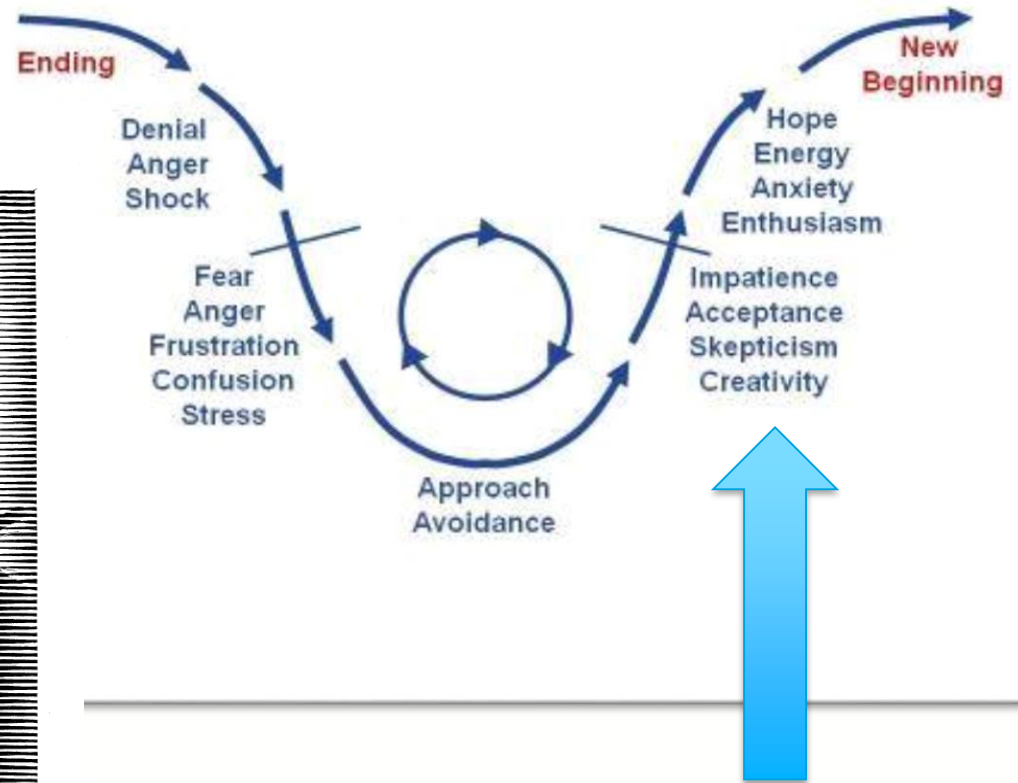
# The Neutral Zone

A sense of becoming



M.C. Escher – Sky and Water I (1938)

## The Transition Curve



Chaos = Creativity



# “The Zone” – Andrei Tarkovsky’s Stalker (1979)



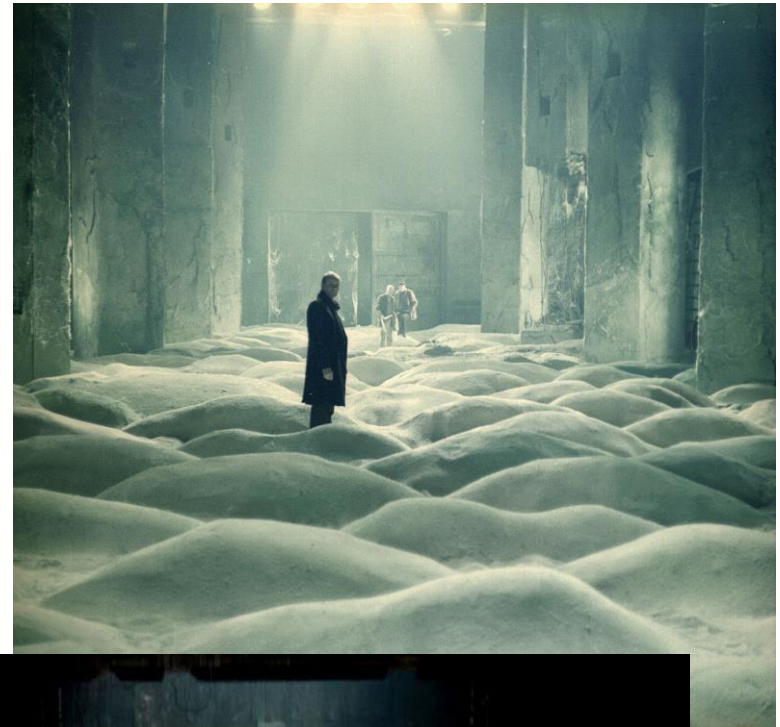
## Stalker

A film by Andrei Tarkovsky

Never less than epic... the most impressive of Tarkovsky's films' Monthly Film Bulletin



“LET THEM BE HELPLESS LIKE CHILDREN, BECAUSE WEAKNESS IS A GREAT THING, AND STRENGTH IS NOTHING. WHEN A MAN IS JUST BORN, HE IS WEAK AND FLEXIBLE. WHEN HE DIES, HE IS HARD AND INSENSITIVE. WHEN A TREE IS GROWING, IT’S TENDER AND PLIANT. BUT WHEN IT’S DRY AND HARD, IT DIES. HARDNESS AND STRENGTH ARE DEATH’S COMPANIONS. PLIANCY AND WEAKNESS ARE EXPRESSIONS OF THE FRESHNESS OF BEING. BECAUSE WHAT HAS HARDENED WILL NEVER WIN”



Сталкер (Stalker), Andrei Tarkovsky, dir. Mosfilm, 1979.

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# THE MIGRATION

(and its expected discontents)

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# My Role:

Butler University



Josh Petrusa  
Assoc. Dean for Technical Services  
Butler University Libraries  
June 28, 2014

Successful Dairy  
Product  
Relocation;  
or,  
Moving Cheese  
for Fun and  
Profit

Image [Coanri](https://flic.kr/p/kTMak), (CC BY-NC-ND 2.0):<https://flic.kr/p/kTMak>

# Helping Staff Through the Transition

- Over-communicate
- Allow for various learning styles
- Offer opportunities to learn, listen, share
- Mark the endings.
- Patience with “neutral zone behaviors”
- Acknowledge difficulty
- Verify expectations are being met (sabotage?!?)
- Keep a focus on the goal

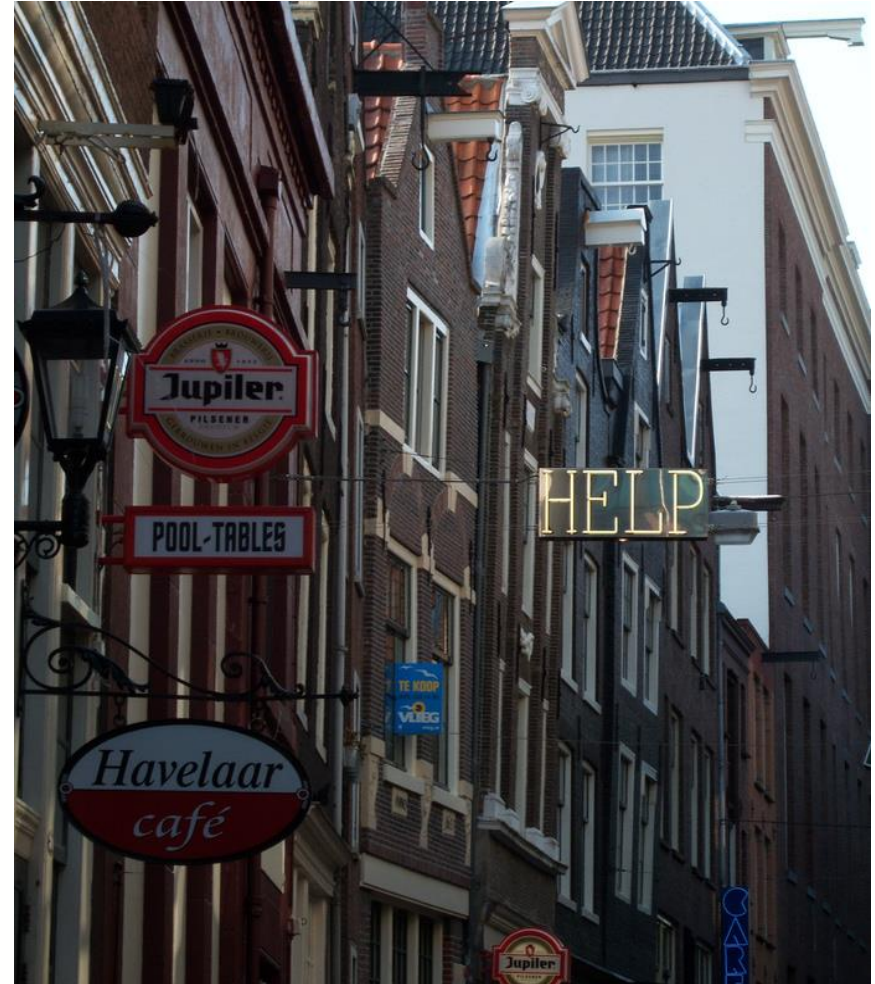




# The Migration Year

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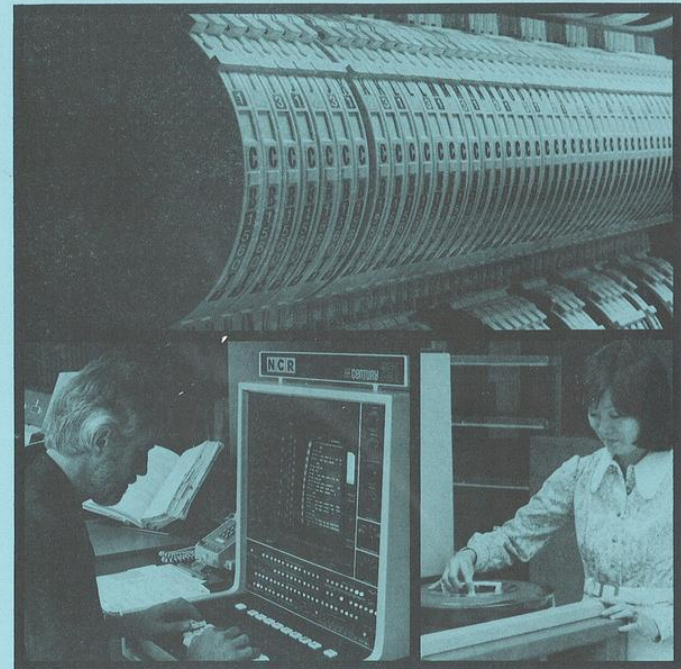
- OCLC's migration process: steering team, cohort, consortium, staff
- Understand how daily work would look different
- Implication of data decisions
- OCLC Consultants – step by step comparisons of workflows



# Update Workflows

- Data decisions – how will it look in the new system?
- Examine processes – did patrons benefit? How many? To what extent?
- Tech Serv staff and the Ptolemaic model: problems beget solutions which over time become complications, discouraging use (always about access, but preferred modes of access change)

## Proposed Data Processing Plan 1977 - 1979



# There will be changes

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## Periodical check-in:

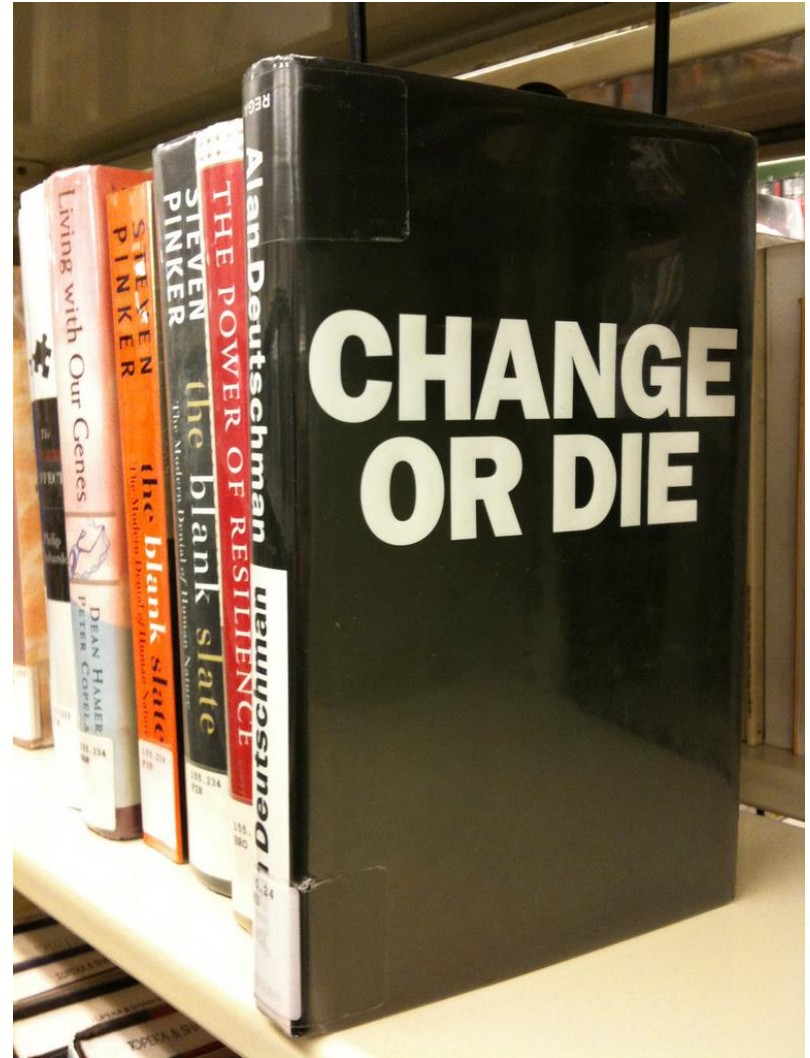
- Reasons?
- Results of work?
- Impact on users?
- Changes since workflow developed?
- Worst case scenario?
- New system options?
- Other areas understaffed?



# There Will Be Changes

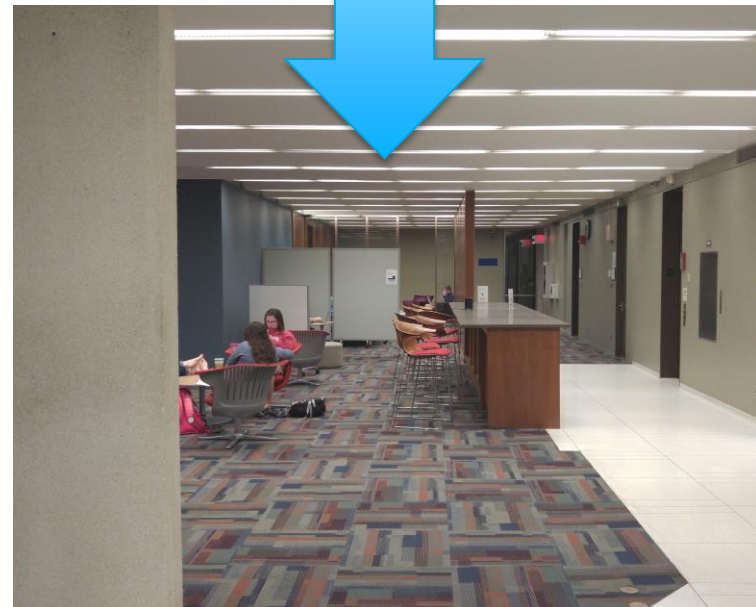
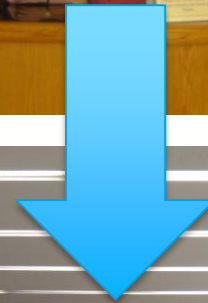
## Item Processing

- Responsibility of a single, part-time, computer-phobic employee
- Ready for retirement
- Shelf-ready processing was available through vendor
- Reduce processing steps overall



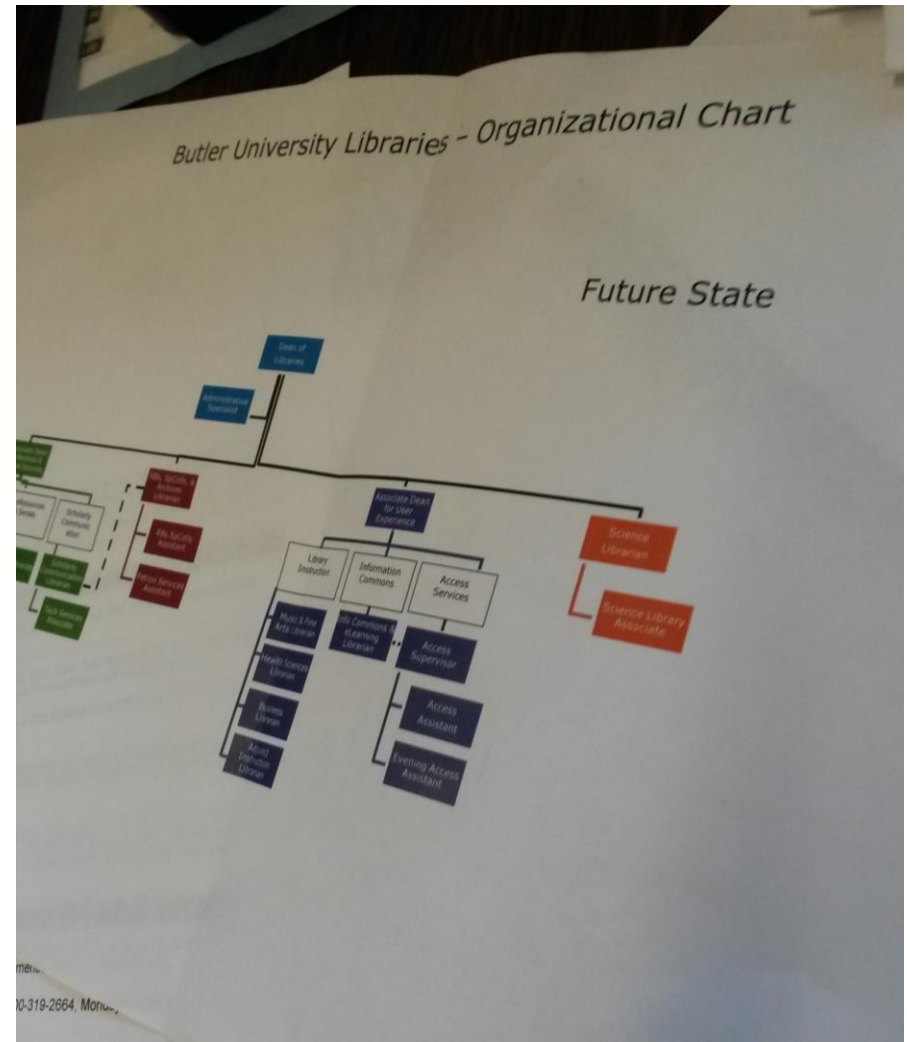
# There Will Be Changes

- Workflows, ILS, discovery system... service points
- Combined service point for circulation, reference/tech help
- Adjusted student workforce, full-time staff
- Added consortial borrowing



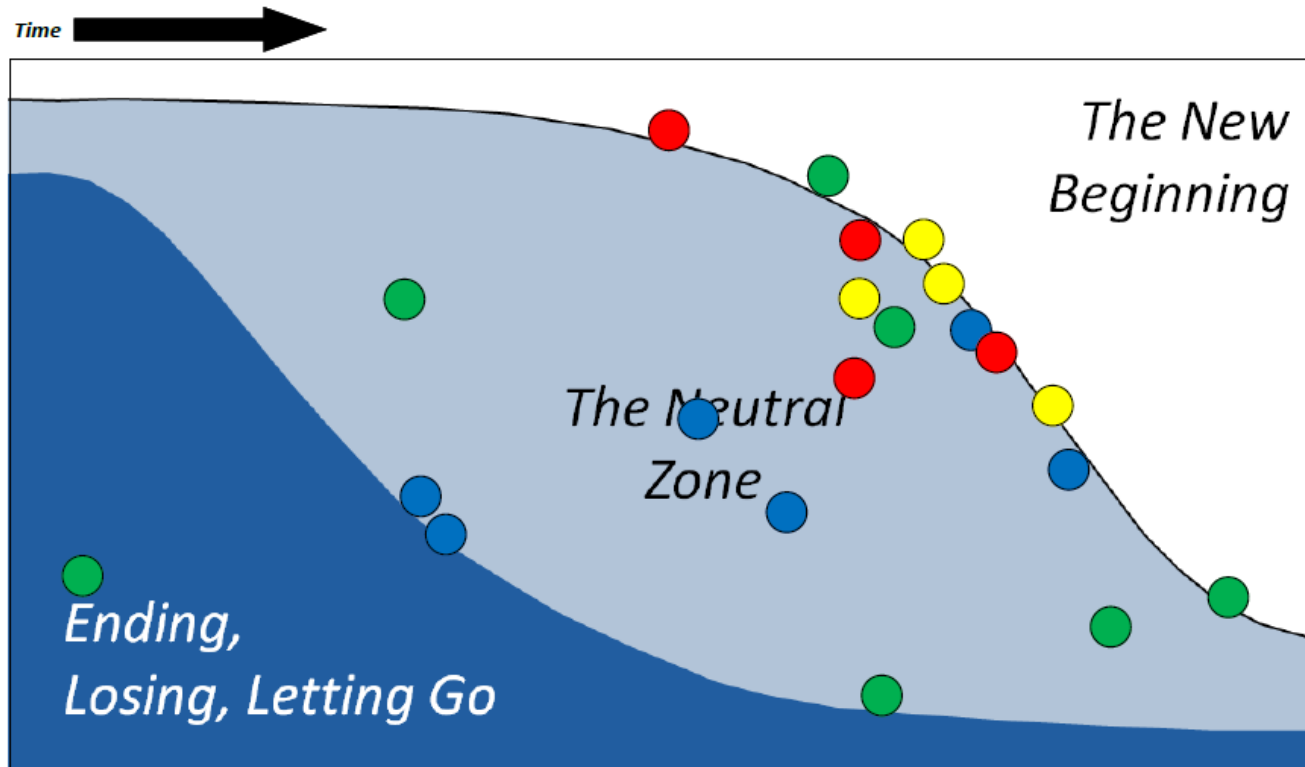
# There Will Be Changes

- Take advantage of streamlining offered by the new system to reallocate resources and energies
- Serve as example to other members of the consortium
- Resist shoe-horning decades-old workflows into a new system
- Do it carefully, but do it



# May 2014 (go-live in new system)

## The Three Phases of Transition



*Phase 1. ENDING:* Letting go of old ways and the old identities within the organization.

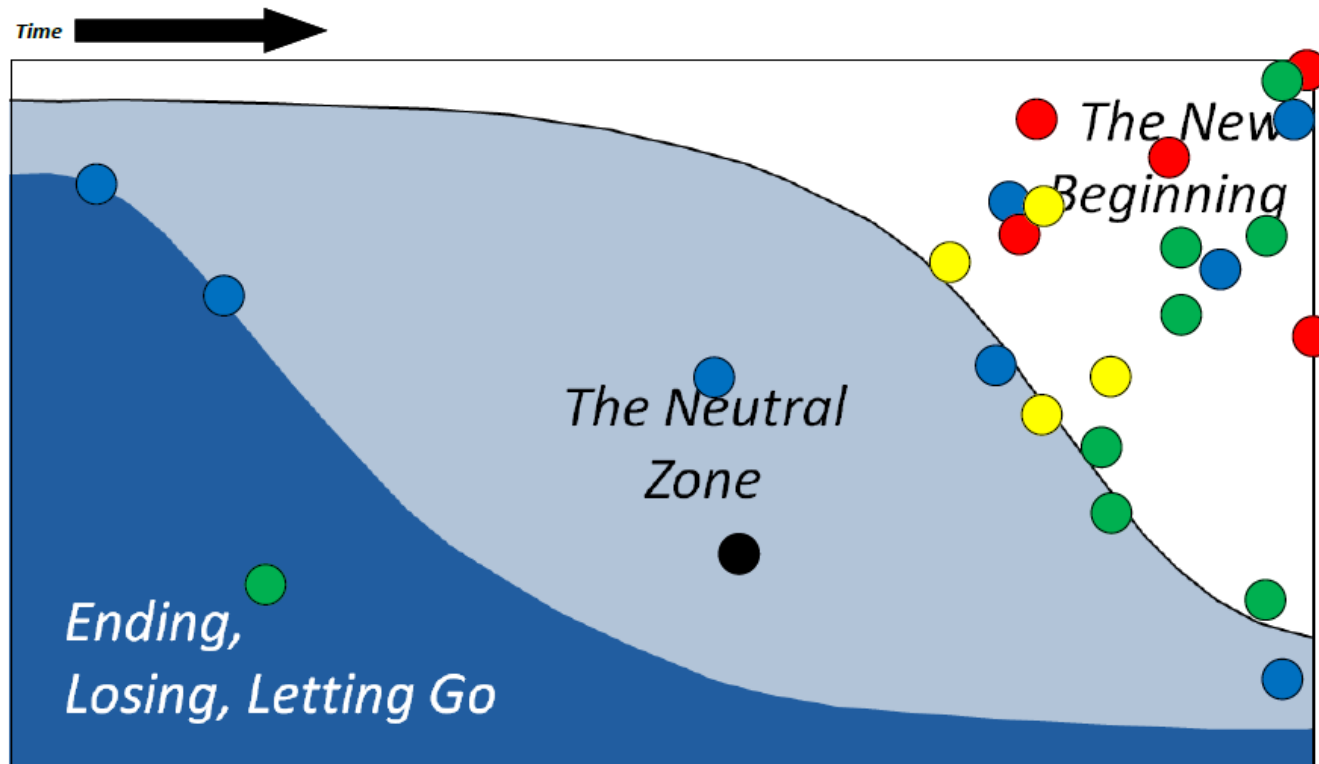
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*Phase 3. NEW BEGINNING:* Coming out of transition; the time for developing new identity, experiencing new energy, and discovering a new sense of purpose.

● Collaborator   ● Protector   ● Initiator   ● Questioner

# October 2014 (after additional building changes)

## The Three Phases of Transition



**Phase 1. ENDING:** Letting go of old ways and the old identities within the organization.

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Collaborator



Protector



Initiator



Questioner



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# CONCLUSION

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# Outcomes

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- Re-aligned library services, efficiently provided, and balanced for print and e-
- Re-aligned staffing for new, high-impact, or collaborative purposes
- Tech Serv into Knowledge Access Managers?
- Staff understand the direction and goals of the library – it will always have endings and new beginnings



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# QUESTIONS?

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