

AREA OF STRATEGIC FOCUS: Organizational Health

The “Urge to Excellence”, to include “organizational health” and cultivating innovation, internal relations and communications, responsive management and decision-making, bringing best practices “home”, managing risk, rewarding breakthrough programs and service, training.

Charges to the Work Group

Develop strategies and an action plan for:

- Moving SAPL from a “what if” to a “why not” mentality
- Empowering individuals to innovate, improve service, and grow personally and professionally
- Ensuring that standards of performance recognize the value of staff innovation and service enhancements/improvements
- Increasing the capacity of executive managers and Trustees to make objective, informed go/no go decisions
- Streamlining communications and service improvements
- Improving overall performance and effectiveness of decision-making
- Ensuring versatility and adaptability while sustaining consistently high service
- Collecting information about customer needs, opinions, and preferences on an ongoing basis
- Incorporating customer feedback into operations and policies
- Rewarding and recognizing staff contributions and stellar performance
- Sustaining a positive public profile for the Library and its programs and services
- Ensuring that performance reviews recognize innovation and leadership
- Leveraging technology to achieve all of the above
- Providing all that is necessary to support SAPL’s “Urge to Excellence”



Chairpersons (with titles and email addresses):

Recorder (with title and email address):

Work Group Members (with titles and email addresses):

Review of Relevant Research

An assessment of “organizational health” is based internal surveys, statistical analysis, in-depth conversations, benchmarking, and other research and observations of key quality indicators (not necessarily in priority order): mission and culture, Library as community space, core service provision, leadership and management, customer service, outreach, partnerships and collaboration, technology, facilities, collection development, work flow, communications, branding, marketing, merchandising, staffing, funding, and institutional advancement, etc.

The research indicates:

- SAPL staff members speak of their employment at SAPL with pride.
- SAPL is repeatedly characterized in the internal research as risk-averse, rigid, conservative, and cautious.
- Staff feels decisions are micromanaged, not always well conceived, and not thoughtfully executed.
- There is a lack of trust between management and staff.
- Communications about changes, new policies, new directions are not always clearly transmitted.

What is the difference between “healthy” and “unhealthy” organizations:

Healthy

Mission-focused
Customer-centric
Transparent decision making
Visionary
Open to new ideas
Big picture orientation
Employees valued, respect, and empowered
Opportunities for personal/professional growth development
Open communications
Willing to take managed risks
Innovation encouraged and “incubated”

Unhealthy

Uncertainty about mission
Focused on internalities
Hidden agendas; cliques; power plays
Unrelenting focus on the “here and now”
“Not the way we do it” thinking
Micromanaged
Employees frustrated, diminished
Limited opportunities for personal/professional growth development
Limited sharing of information
Risk averse
Innovation inhibited; opportunities lost



How to Proceed

1. Your work group's files are located on a password-protected FTP site that is only available via an FTP client like Filezilla. Filezilla has been installed on all SAPL computers.

To access your group's files:

- Open Filezilla
- Type ftp.ivygroup.com in the hostname box
- Type our workgroup's name (sapl6) in the username box
- Type your workgroup's password (7rAsT@Se) in the password box
- Click "QuickConnect"

The files on the FTP site will appear in a folder tree on the right-hand side of the screen, while the files on your local computer will appear in a folder tree on the left-hand side of the screen.

- Files can be uploaded and downloaded by the "drag-and-drop" method.
- Be careful not to delete any of the files on the FTP site!

If you have questions, please contact Sonia Arredondo at:
Sonia.Arredondo@sanantonio.gov

2. Designate a recorder. Decide when and where you will meet. Drafts of your plan are due on March 28.
3. Divide up the reading of the Research. In particular, be sure to review the Tapestry and Trends reports on the ftp site.
4. Consult the literature, meet and discuss, and seek advice as you need. Nancy Davis is available at davis@ivygroup.com. Pam Fitzgerald is available at fitzgerald@ivygroup.com.
5. While the attached bibliography is not comprehensive, it provides a top line list of resources that may assist your work group's deliberations. Again, you may also call on The Ivy Group at any time when you have questions, to facilitate a session via webinar, or to assist your work group as it makes decisions.



Topics and Questions That Can Shape Discussions

- Do Trustees and senior management speak of each other with respect?
- Does Library leadership speak of colleagues and front line staff with respect?
- Do front line staff speak respectfully of management?
- Are customers treated with respect?
- Are the tone and tenor of conversations energetic and optimistic or do conversations focus on conflicts, differences, and frustrations?
- How often is library funding the focus of conversations?
- How often are customers the focus of conversations?
- How positive or negative are these conversations?
- Is there evidence of a variety of uses taking place concurrently and in harmony?
- Are people who walk through the front door greeted courteously and cheerfully?
- Is signage helpful and upbeat (or admonitory and proscriptive)?
- Are public spaces tidy and in good condition?
- Are the bathrooms clean?
- Does the Library pass the “Dilbert Test”? (i.e. How many “Dilbert” cartoon strips—satirizing workplace frictions, policy absurdities, and managerial frustrations—are tacked on to employee bulletin boards?)

Regarding Mission and Culture

- Does the Library fulfil its mission with innovative, customer-focused services that are compelling, convenient and easy to use?
- Is the Library a hive for intellectual and cultural activities?
- Does it provide learners of all ages with appropriate amenities, services, and programs?
- Does the community value the Library’s collections and programs—and the buildings that house them—as community assets work in synergy with other municipal institutions, schools and businesses to build a better community?
- Does the community speak of the Library with pride?
- Do elected officials point to the Library with pride?

Regarding Board Engagement

- Are trustees and board members proud to be on the Library board? Are they actively engaged in the life of the Library?
- Are they effective advocates? Do they work with the Director to identify and cultivate prospects and to provide stewardship to donors?
- Do they provide just, confident, enlightened governance and fiduciary and policy oversight?
- Are their actions in conformance with state code?
- Is there a formal program of new member orientation? Are trustees expected to attend periodic trustee training sessions?



- Does the board's makeup reflect the diversity of the community?
- Does Board leadership plan and train for succession?
- Do Board members bring the array of skill sets necessary for sound oversight, advice, and consent? If not, is there a recruitment strategy in place?
- Do Trustees maintain positive and production relations with Friends and Foundation Boards? Are the relative roles and responsibilities of the three groups clear?
- Is the Board actively engaged in harnessing grassroots support?
- Are communications regular? Are decisions transparent?

Regarding Planning for Core Services

- Is research-based planning an institutional priority? Does planning involved staff at all levels? Do they have faith that recommendations will be implemented?
- Do plans incorporate clear, measurable goals? What accountability will there be for plan implementation?
- Do plan strategies reflect best practices in service provision?
- Is Library planning aligned with municipal goals, priorities, and objectives?
- How will the Library proactively address known service gaps?

Regarding Funding

- Is the Library perceived as a fiscally responsible organization?
- Does the Library receive the financial support it needs to sustain quality service?
- Are funding levels stable and predictable?
- Do budgets account for capital conservation and reserve fund needs?
- Is there evidence that procurement practices are professionally administered and conducted according to statute?
- How do Library leaders speak of funding levels and budgeting "off the mic"?

Regarding Library Leadership and Management

- Does Library leadership hold itself accountable for achieving planning goals?
- Does Library leadership articulate a vision with clarity and consistency?
- Do Library managers communicate effectively with each other? With staff?
- Are branches "silos" or in step with institutional goals and priorities?
- Is Library leadership skilful in managing external stakeholder groups?
- Is Library leadership effective in advocating for the Library?
- Does Library leadership maintain positive donor relations?
- Does Library leadership exhibit superior management and interpersonal skills?
- Does Library leadership support innovation and risk taking?
- Does Library leadership maintain positive working relations with Trustees, Foundation Boards, and Friends groups?



Regarding Staff

- Are staffing levels adequate?
- Is the staff as diverse as the community it serves?
- Is there racial, gender, and lifestyle equity in hiring?
- Do staff members have clearly delineated areas of responsibility and accountability?
- Does the Library operate efficiently and eliminate routine or redundant tasks in order to provide more customer-focused services?
- Has the Library conducted workload/task time analysis?
- Are appraisals used effectively to improve performance?
- Are there opportunities for staff to provide feedback to Library leadership?
- Does Library staff share information with outside consultants that cannot be shared internally?
- Does the Library offer opportunities for professional development and advancement?
- Are front line staff members involved in decisions to make specific changes that will affect how they do their job?
- In general, does staff view change as beneficial or detrimental to the organization?
- Is compensation in line with prevailing market rates?
- What are rates of staff turnover? Are effective outplacement procedures and supports in place?

Suggested Areas of Exploration

- Teamwork
- Rewarding innovation and creativity at all levels of the organization
- Streamlining decision-making
- Assessing and managing risk
- Internal communications
- Performance standards
- Training, coaching, and mentoring for management and leadership
- Additional recommendations

Strategies/Implementation Plans

For each strategy recommended, present an Implementation Plan that considers:

- Actions to be taken
- Anticipated Costs (to include staffing, materials, facilities, and administrative costs)
- Organizational capacity
- Required changes to policies, procedures, and/or by-laws
- Facilities Implications
- Funding sources
- Marketing and communications



- Training
- Individual(s) responsible for implementation
- Timeline
- Measures of Success (quantitative? qualitative?)
- Additional resources required
- Additional issues to be addressed/recommendations

Resources

Abram, Stephen, Judith A. Siess, and Jonathan Lorig. *Out Front with Stephen Abram: a Guide for Information Leaders*. Chicago: American Library Association, 2007. Print.

"Cover Story: Discover Innovations at DOK, Holland's 'Library Concept Center.'" *Information Today, Inc.* Web. 27 Aug. 2010. <<http://www.infotoday.com/mls/mar08/Boekesteijn.shtml>>.

"Innovation and Strategy: Risk and Choice in Shaping User-centered Libraries." *REFDOC*. Web. 27 Aug. 2010. <<http://cat.inist.fr/?aModele=afficheN&cpsidt=16346759>>.

Pungitore, Verna Leah. *Innovation and the Library: the Adoption of New Ideas in Public Libraries*. Westport, CT: Greenwood, 1995. Print.

Riggs, Donald E. *Creativity, Innovation, and Entrepreneurship in Libraries*. New York: Haworth, 1989. Print.

Check out the innovation grant and awards programs and winners for:

International City/County Management Association

Urban Libraries Council *Top Innovator Awards*

Center for Library and Information Innovation

ALA/PLA Highsmith Library Innovation Awards

