Organizational Renewal Initiative

ORGANIZATIONAL MODEL AND STRUCTURE

June 22, 2017

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Organizational Development Journey

The release of this new organizational model is a very exciting and significant milestone that brings together the great work, vision and ideas coming out of staff and community contributions throughout Western Libraries organizational development journey; including the strategic plan, the workforce analysis and planning project, and, most recently, the organizational renewal initiative. Together we have crafted a strategic framework for the organization of Western Libraries that builds upon our strengths and reputation for strong service and that enhances our capacity to contribute to student success and research excellence at Western.

Western Libraries Strategic Plan

In February 2015, Western Libraries launched its strategic planning initiative, called Future Library In Progress (FLIP). The strategic planning initiative was an inclusive and consultative process, engaging students, faculty, campus partners, researchers and Western Libraries staff in the definition of Western Libraries mission, vision, values and strategic directions. Western Libraries Strategic Plan and Strategy Map outline how we will advance the vision and strategic priorities of Western University as delineated in Achieving Excellence on the World Stage.

Western Libraries strategic plan is driven by the advancement of student, teacher, and researcher success and the achievement of learning and research outcomes. Our mission, vision, and values are fundamental to our success and to the achievement of the strategies outlined in the plan. These guiding principles are also key factors, drivers and enablers for our organizational renewal effort.

Our Mission: As the academic commons of Western University, Western Libraries provides the library and archival expertise and infrastructure – information resources, technology, people and spaces – required to cultivate and mobilize knowledge, and accelerate excellence in teaching, research, and scholarship.

Our Vision: We engage, inspire and empower students, scholars and researchers to achieve their full potential as global citizens and leaders.

Our Values: In all that we do, we value: teamwork, respect, accountability, communication, creativity, service, collaboration, and innovation. Western Libraries' values shape our organizational culture, inform the way we work together and with others, and guide our individual actions, reactions, and behaviours. Living our values is key to a healthy organization and is especially important in times of change. Please see appendix one of the strategic plan for a definition of each of our core values.

Strategies of Excellence: The following strategic priorities guide our planning and the development and delivery of our services:

- Manage world-class print and digital collections and resources
- Advance 21st century literacies
- Partner in and support research to advance research excellence
- Champion open access and transform scholarly communication
- Cultivate purposeful partnerships on campus and beyond

- Provide user-centred spaces and technologies
- Actively engage with our communities
- Deliver service excellence to library users and the University

Strategic Pillars: The following commitments in the Strategy Map relate directly to the organizational renewal and how we prepare and enable our organization to deliver on the promise of the strategic plan:

- We work in a learning culture that encourages agility, curiosity and innovation.
- We have the skills and competencies needed for a fast changing world and we work in relevant roles, focused on the right priorities.
- We have a strong sense of shared responsibility and purpose, based on trust and are empowered to achieve success.
- We work in flexible facilities and spaces that cultivate productivity and well being.
- We proactively assess our environment and user expectations and take action to meet emerging needs.
- We are transparent and align resources and decisions to vision, strategies and annual priorities.
- We are fiscally responsible and seek opportunities to work more effectively and realize efficiencies.

Workforce Analysis and Planning Initiative

The Workforce Analysis and Planning Initiative (WAPI) built upon a 2014 Staffing Plans Working Group project and was the first major priority coming out of the 2015 strategic plan. The WAPI project team's charge was to investigate organizational structures, service models and human resources allocation at other organizations, consider workforce development requirements, and recommend an organizational design that would best advance our strategic priorities.

The *WAPI Summary Report and Recommendations* outlined a suite of seven recommendations, identifying the need for a new organizational design centred on four core user functions supported by foundational functions. Its proposed service model presented an integrated, user-centred organization and an approach to service development and delivery for Western Libraries that moves away from a focus on physical library location and aligns with the core user functions. The project team characterized the proposal as a "hybrid service model", which signaled the intent to combine the proposed functional model with a continuance of some elements of liaison activity. The WAPI vision aligned librarians with a core user function, acknowledged subject expertise, anticipated cross-functional responsibilities, and allowed a team-based approach to service delivery, offering a wider network of library service providers to our users. The project team proposed that this shift was necessary to create capacity for staff to deepen their knowledge in the core user functions and to enable them to contribute effectively and provide leadership in the evolution and development of new and existing services.

The project team also recommended a comprehensive Core Competency Framework for Western Libraries that outlined core foundational knowledge and workforce competencies for all staff. Further, the team recommended that competencies be developed to reflect the specialized knowledge and skills required to support the core user and foundational functions.

Organizational Renewal Initiative – Working Groups and Steering Team Report

The next phase of organizational development built upon the work of WAPI and focussed on the further definition and development of a hybrid service model centred on the four core user functions: User Experience and Community Engagement; Teaching and Learning; Research and Scholarly Communication; and Content Management, Discovery and Access. Consideration of the foundational functions - such as information technology services, facilities, or administrative and financial services - was limited to the inter-relationships with the core user functions.

The Organizational Renewal Initiative (ORI) sought broad participation and engagement in the process by staff from a variety of positions and roles across Western Libraries, so that as many voices could be brought to bear in this important stage as possible. From July 2016 through January 2017 a Steering Team and four Working Groups worked to develop a new organizational framework for Western Libraries. They also considered the specialized knowledge, skills, competencies and supports necessary for success and made recommendations to support staff and service transitions. There was a very high level of engagement in the process, with over fifty individuals directly participating and multiple points of broad staff consultation. More information about the Working Group process including all inputs (project resources, engagement results) and outputs (working group reports) is available to Western Libraries staff via the ORI intranet site.

The *Steering Team Report and Recommendations* consolidated the recommendations in the Working Groups reports and presented an overarching framework for a new organization for Western Libraries and a system-wide model centred on user outcomes and services rather than physical library locations. The team established clarity through the development of a common understanding of proposals and terminology and they identified points of distinction, intersection and overlap across the functional areas. The Steering Team report acknowledged that there will always be necessary and productive areas of cross-functional collaborative and integrated work across Western Libraries. The Steering Team also worked together to bring the functional requirements into a "hybrid service model" with a redefinition of liaison responsibility. Please see the report for details about the process and participants and recommendations.

Organizational Renewal Initiative – Organizational Model and Structure

For the Organization Renewal Initiative to succeed, it is critical that we all, as members of Western Libraries, envision ourselves as one system with one mission and a common set of collaboratively established values and goals. The organizational development work to date has demonstrated that by working together we can achieve so much more than working separately. We can build upon this high-level of engagement and the trust we've placed in one another throughout a challenging and rewarding process of imagining our future together. The journey will empower us to create a more responsive, efficient, and personally fulfilling organization. This conceptual commitment to a common vision is every bit as important as the material reorganizations detailed below.

The planned organizational model and structure outlined in the remainder of this report and in the accompanying organizational chart, reflects very closely the proposed organizational framework presented by the Steering Team, so much of this articulation will be familiar. As we on the Senior Leadership Team considered how best to translate the recommendations into an actual new structure within available resources the need for some modifications became clear. As a result, one will note

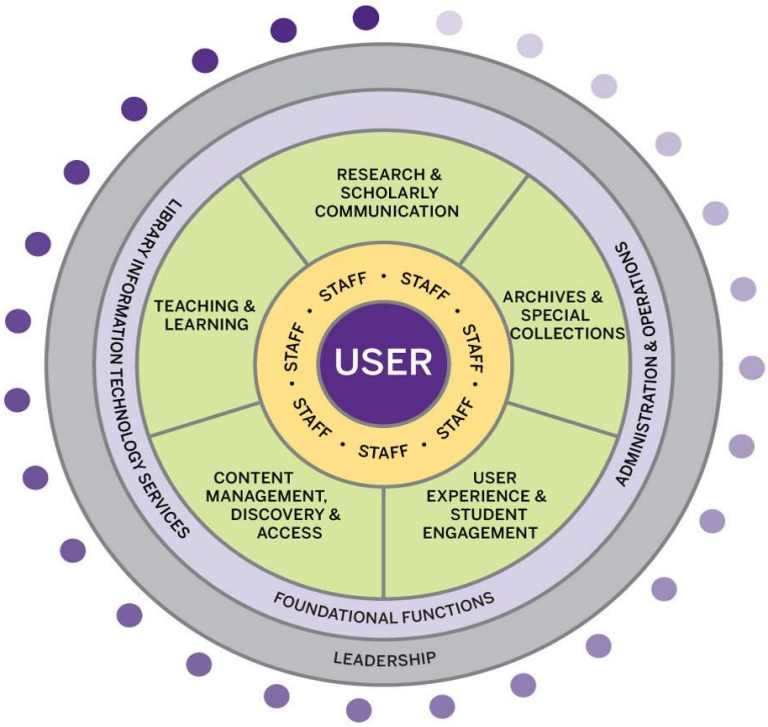
some changes in terminology and alterations to the proposed service models for the functions and system. In particular, Archives and Special Collections has emerged as an additional functional area that participates in the four core user functions while remaining distinct. It is also important to note that all current incumbent staff members are accounted for in the new structure, in other words, there is a place in the new organization for everyone.

Conceptual Organizational Model

A simple organizational model has emerged to illustrate Western Libraries' focus on user outcomes (please see the illustration below). In the model, all functions are centred around the user and are designed to foster an optimal user experience, deliver strategic services, and directly contribute to learning, teaching, and research outcomes.

Staff are represented supporting our user at the heart of the new model – a model that depends upon engaged teams of individuals with a deep commitment to student success, teaching and research excellence, and quality service.

The outside rings of the model illustrate that the foundational functions and our leadership provide unifying support and direction, and contribute to user outcomes. Leadership, as imagined here, is inclusive and consists of not just formal leadership groups and roles but also informal leadership demonstrated by staff across the organization who take initiative, foster ideas, promote innovation, and lead and contribute to projects and service developments.



ORI CONCEPTUAL ORGANIZATIONAL MODEL FOR WESTERN LIBRARIES

Integrated Services Model

The new structure introduces an integrated services model for Western Libraries. An integrated service model seamlessly delivers services across physical and virtual locations as well as functional areas, ensuring that Western students, teachers and researchers are connected with the services they need, when and where they need them. It is not in our interest, nor in the best interest of our users, to build or create new silos of activity. To be successful, this model will require strong communication, teamwork, and collaboration and a deep commitment to service, student success and research excellence - all core Western Libraries values. The integrated services model successfully translates the concept of the "hybrid service model" presented in the Steering Team report as well as the vision for a system-wide front-line service model defined below as user services delivery.

Libraries are an integral part of the integrated services model despite the fact that we will no longer organize ourselves structurally around physical locations. Libraries remain open as active learning commons and service locations for the disciplines and Faculties they serve. They will also remain active staff workspaces providing opportunity for functional activity and collaboration. They remain important event, meeting and consultation spaces and they provide critical in-person services and access to collections.

Establishing a system-wide user-centred service model will create a common suite of services and a common user experience across the system. It will also enable Western Libraries to retain necessary flexibility to reflect unique service requirements and increase our capacity to do so by broadening the pool of skilled staff available. The integrated service model enhances our capacity to apply trained staff, and subject and functional expertise from across the system to deliver services that are more robust and to extend our teaching, learning and research initiatives and impact.

The responsibility for liaison activities as redefined in the Steering Team report and new organizational model is a natural extension of the integrated services model. It moves away from the notion of an individual 'liaison librarian' who acts as the sole point of contact and primary service provider for specified departments toward a functional team-based approach to service delivery and academic community engagement. Each functional team is responsible for fostering the necessary relationships and partnerships to succeed and for active outreach and communication related to their services. The new model respects and honours disciplinary and interdisciplinary approaches to service development and delivery across the functions and allows us to recognize and call upon subject expertise from across the system, wherever it may reside, whenever it is needed.

In the new model four librarians from the functional areas will be assigned Disciplinary Coordinator responsibilities, with a strategic responsibility for liaison with one of the broad disciplinary groups of; STEM (Science, Technology, Engineering, Mathematics), Health & Medicine, Arts and Humanities, and Social Sciences. Library Directors continue to provide strategic responsibility for liaison for the Faculty Libraries. Disciplinary Coordinators and Library Directors do not act as gatekeepers but rather as strategic leaders, initiators, and connectors to Faculties and representatives of Western Libraries. This is a responsibility to: build connections and strategic relationships; to identify strategic opportunities for collaboration and integration; and to coordinate efforts and foster collaboration across the core user functions. It is a responsibility operating from a strategic perspective, identifying opportunities at programmatic, Faculty, inter or intra disciplinary, or campus initiative levels. They identify strategic

opportunities for Western Libraries to contribute to University and Faculty academic and strategic plans, academic and research initiatives, and enhance the reach of the functional teams.

Community Coordinators will function in much the same way as Disciplinary Coordinators, establishing relationships and working strategically with key partners outside of the disciplines. As has been previously described, in the new model each functional area will be responsible for identifying and establishing relationships with appropriate community partners; for example, Research Western is a key community partner of Research & Scholarly Communication. With this in mind, the assignment of Community Coordinators who will work beyond the relationships established by the functional areas will be deferred. This will allow the functional teams time to identify and establish necessary community relationships and help us to identify any significant gaps where a strategic community connection would be desirable and assign a Coordinator to this area or group.

Functional Area Descriptions

User Experience and Student Engagement

Mandate	User Experience & Student Engagement is dedicated to the evidence-based development, design and delivery of virtual and in-person user-centred services where and when our users need them. We continually study and assess user behaviours, needs, and interactions with Western Libraries and we design services, communications, and interfaces that aim to deliver an optimal user experience. We create community engagement and provide innovative events and services through collaboration and partnership across the library with our University and off-campus communities.
Description	User Experience & Student Engagement is organized into two teams, User Experience and User Services. The work of these two teams is highly inter-related and synergistic, with an overall focus on delivering and developing a suite of high quality, user-centred services to the Western community, as well as developing and delivering programs that support student engagement and outreach activities. They collaborate with campus partners such as Student Experience, Communications and Public Affairs, and relevant student bodies. User Experience will focus on the evidence-based development and design of user-centred Library programs, spaces, and services, offered both in-person and virtually, for the Western community. Through collaboration across functions, User Experience will provide leadership in building a culture of user experience practice at Western Libraries, with a goal of creating seamless connections for users among the Library's services, physical collections, digital collections, physical spaces and virtual presence. In particular, User Experience (supported by LITS and a new Communications role) will assume primary accountability for the Western Libraries website, and be responsible for providing a user-centred design and unified vision and voice for the website and web-based services. The User Experience team will also provide critical support and expertise to other functions in areas of specialisation, including assessment, student engagement and outreach, as well as web services.

	User Services has primary accountability for delivering and developing a suite of quality user services to the Western community, with a seamless user experience depending on both front-of-house and back-of-house user services work. Front-of-house work refers to user services activities typically carried out through direct or real-time contact with users. Back of house work typically occurs behind the scenes away from direct user contact. Note that interlibrary loans services and staff will reside in User Services, aligning this work with similar document delivery services also included in this functional area, e.g. Course Reserves. The User Services team will work together with the Library Directors and their colleagues in User Experience, to design, implement and iterate a system-wide user services strategy and model. The model will take into account any unique operational needs of Western Libraries service locations. User Services staff will be trained to deliver service in a primary and secondary location, ensuring staff resources may be allocated to meet service demands when and where they are most needed. User Services will collaborate and participate in User Experience projects and initiatives including the identification, design and delivery of student engagement and outreach programs for the Western community, with a focus on programs that support student success and the best student or user experience.
Management-level Leadership	Head, User Experience & User Services Library Director Manager, User Services
Senior Leadership	Associate Chief Librarian, Academic

Teaching and Learning

Mandate	Teaching & Learning advances the integration of 21st century literacies into the academic life of Western University. Grounded in our disciplinary expertise of information science, we partner strategically to create learning experiences that empower students to become successful graduates who are able to achieve their full potential as information literate global citizens and leaders.
Description	Teaching & Learning will work with campus stakeholders across the curriculum cycle at the institutional, Faculty, departmental and course level to design and deliver effective face-to-face, e-learning and blended learning experiences. In particular, we will foster and sustain a close partnership with the Teaching Support Centre. Teaching & Learning Librarians will serve four broad disciplines: Arts & Humanities, Social Sciences, STEM and Health & Medicine, with the team working together to identify priorities and determine an appropriate distribution of work across these disciplinary areas. Other major activities undertaken include developing and administering appropriate assessment measures to evaluate student learning, identifying, evaluating and recommending teaching and learning technologies that support the IL program and student learning, and collaborating with Western Libraries colleagues and Western partners to develop effective campus learning spaces.

	Teaching & Learning will provide support for colleagues developing and delivering teaching and learning activities for other core user functions. In addition, Teaching & Learning will work closely with User Experience & Student Engagement on developing and delivering programs and services related to student learning and outreach. A dedicated Teaching & Learning team will be well positioned to create a strategic, robust, and effective information literacy program for Western that addresses expressed needs of various Faculties, and integrates 21st century literacies into a variety of curricular, extra-curricular and co-curricular experiences.
Management-level Leadership	Head, Teaching & Learning
Senior Leadership	Associate Chief Librarian, Research

Research and Scholarly Communication

Mandate	Research and Scholarly Communication collaborates with researchers across campus throughout the research cycle to advance the creation, management, dissemination, and preservation of scholarship. In a changing research landscape, we explore new models of scholarship; advocate for and increase awareness of scholarly communication issues such as copyright, author rights and open access; promote effective data management practices; and consult on the use of research metrics to evaluate scholarly output. Through these efforts, we facilitate excellence in research across Western University and the broader community.
Description	The team will develop initiatives and services to support and contribute to all phases of the research cycle: • Research planning and ongoing research consultation and participation • Data creation and digital scholarship including eScience and the digital humanities • Scholarly communication and copyright: including scholarly publishing, open access and intellectual property • Evaluation of research impact and research metrics • Preservation of research data, digital objects, publications, and archival records • Data and research discovery Research and Scholarly Communication will foster campus partnerships and actively collaborate in the provision of research services for the development of exemplary scholars and the creation of significant scholarship. In particular, we will collaborate with Research Western and sustain an active partnership in research services and knowledge exchange activities. We will also facilitate and advocate for research within Western Libraries, and participate in research to support evidence-based library practice.

	The team will work together to identify priorities and determine an approach to the development and provision of services in support of the research cycle and the distribution of team responsibilities and activities.
Management-level Leadership	Head, Research & Scholarly Communication
Senior Leadership	Associate Chief Librarian, Research

Content Management, Discovery and Access

Mandate	Content Management Discovery and Access is committed to ensuring that users experience seamless, convenient discovery of and access to the content they require to support research, scholarship, and teaching in an evolving 21st century academic institution. Through user-informed selection, acquisition, management, and provision of access to content, we meet changing collections and content needs while ensuring responsible stewardship of our collections and strategic expenditure of the acquisitions budget.
Description	Content Management, Discovery and Access is comprised of three teams: Collections & Content Strategies; Discovery, Description & Metadata; and Acquisitions. Members of these teams work collaboratively to anticipate and ensure proactive provision of access to high quality content, regardless of format and in alignment with strategic priorities. The teams will ensure that users experience seamless, convenient discovery of and access to collections through strategic user-informed selection, management, and provision of access to content that supports research, scholarship, and teaching at Western University. Our work will require close, day-to-day working relationships with colleagues across Western Libraries in the core user and foundational functions and with campus partners. Individual librarian members of the Collections and Content Strategies team will have enhanced knowledge and provide expertise for one of the broad disciplinary areas of Social Sciences, Arts & Humanities, STEM (Science, Technology, Engineering and Math) or Medicine and Health. All three teams will continually review and adjust how Western Libraries acquires, makes accessible and manages content to meet changing user needs in a fiscally responsible way. These three teams will be formed by focusing and re-aligning existing information resources management work activities and services, as well as by moving in additional existing resources to create the new Collections & Content Strategies team
Management-level Leadership	Head, Collections and Content Strategies Head, Discovery, Description and Metadata Manager, Acquisitions
Senior Leadership	Associate Chief Librarian, Content

Archives and Special Collections

Mandate	Archives and Special Collections is committed to acquiring, preserving and providing access to select rare and unique special collections and archives, in all media formats, in order to support the teaching and research missions of the University. We also support the operations of the University by ensuring that University records of enduring value are preserved.
Description	Archives and Special Collections builds on the existing strengths of staff and collections to support greater integration of archival and special collections content and services into each of the four core user functions, as well as the implementation of key parts of Western Libraries' digital strategy. This will be achieved by consolidating and re-focusing our existing resources, activities and services to align with the core user functions, as well as by selectively devoting additional resources to address gaps in current services such as special collections, digitization and digital preservation strategy and support. It will also require close, day-to-day working relationships with our colleagues across Western Libraries who are responsible for both core user and foundational functions as well as collaboration with various campus partners. While our primary focus is on facilitating advanced research by graduate students, faculty members, and external scholars, as well as documenting the history of the University, we also participate and engage with and welcome use of the rare and unique materials by members of the broader heritage community. We also generate awareness of archival and special collections through the curation of exhibits and participation in community events, and actively support the acquisition of new materials through donor relations and stewardship.
Management-level Leadership	University Archivist
Senior Leadership	University Archivist

Administration and Operations

Mandate	Administration and Operations serves all of Western Libraries by providing administrative support and operational oversight with respect to the following services: human resources and employee relations; purchasing, finance and budgeting; administrative support; capital projects planning and coordination; space renewal; facilities; storage services; as well as communications, marketing and graphic services.
Description	Administration and Operations combines Administrative Services and Facilities and Storage Services to coordinate many foundational operational and administrative services in order to improve coordination and service alignment. Administration and Operations is comprised of three unique teams: Administration and Finance; Communications and Marketing; and Facilities and Storage Services.

	Our capacity to support communications and marketing efforts across Western Libraries will be enhanced by the addition of a Communications and Marketing Officer who will work with library staff involved in graphics design, service promotion, community outreach, assessment, and library development efforts. We will also work closely with campus administrative units such as Institutional Planning and Budgeting, Financial Services, Facilities Management, Human Resources, Faculty Relations, Alumni Relations and Development, and Communications and Public Affairs.
Management-level Leadership	Supervisor, Administrative Operations Manager, Facilities and Storage Services Communications and Marketing Officer
Senior Leadership	Director, Administration and Operations

Library Information Technology Services

Mandate	Library Information Technology Services provides technology support, solutions, and services to support all areas of Western Libraries through key systems and services; these include public computing, staff computing, intranet, public website development, integrated library system (ILS), printing, application development, domain management, and technical support. In addition to this operational support, we support all core user functions by translating their requirements into technical solutions and/or architecture to support the strategic goals of Western Libraries.
Description	Library Information Technology Services will realign its work to support Western Libraries new organizational structure by providing new and/or enhancing existing services in the following areas: • System Integrations • Application Development • Technical Support Focusing on system integrations will allow us to develop new library services and improve the efficiencies of existing processes through automation. Tighter integration between our library systems and campus/consortial systems will allow us to provide a greater breadth of services to our users and make existing services more real-time, functional, and better aligned to our user's needs. As we enhance our application development capabilities, we will gain the ability to enhance and create robust applications that can fully leverage our data assets while helping to increase efficiencies through self-serve options and automation. To help improve internal department efficiencies, we will move towards an enhanced technical support model, which will provide self-support options and training videos designed to help both library staff and users become more proficient in the use of library systems.
Management-level Leadership	Director, Library Information Technology Services (LITS)
Senior Leadership	Director, Library Information Technology Services (LITS)

Management and Leadership in an Integrated Services Model

To be successful in an integrated services model requires that we work more collaboratively, across functions and locations, than in the past. This will be true for each of us and it is particularly true in relation to the way we manage Western Libraries. The formal management and leadership structure and our expectations for how we manage signals a shift to managing as a team and emphasizes collaborative leadership. Collaborative leadership enables the achievement of effective outcomes across organizational lines through open, constructive communication, staff engagement, shared control, and a sense of common purpose.

Management

A new organizational structure necessarily requires adjustments to the management structure of the organization. Collaborative management will be practiced day-to-day and integrated into the way managers approach their work. Management Committee, consisting of all managers and supervisors across Western Libraries, will continue to be a critical forum for open communication and collaboration. Four new Head positions have been created, one in each of the core user functional areas, plus a new Communications and Marketing Officer.

The larger functional areas such as User Experience and Student Engagement and Content Management, Discovery and Access have management teams that will work together to oversee the full scope of services and responsibilities of these areas. The CMDA management team consists of the two existing managers, the Head, Discovery, Description and Metadata and the Manager, Acquisitions, plus a new Head, Collections and Content Strategy. The Head, User Services and User Experience will work with the Managers, User Services and the Library Directors to oversee the development and operational management of our service model and service locations. User Services Library Assistants will report to the Managers, User Services, within a matrix management model. On-site supervision and daily operations management for Taylor and Weldon will be provided by the Managers, User Services and for the Faculty Libraries by the Library Directors. They will also work with the Manager, Facilities and Storage Services in the management and maintenance of the library facilities.

Western Libraries Senior Leadership Team

The Senior Leadership Team provides strategic leadership for the achievement of Western Libraries' Strategic Plan and for the functional areas of activity.

Shared Responsibilities

- Leadership for the development of strategies, policies, processes, and plans
- Fostering a dynamic, inclusive, and engaged workplace environment
- Executive sponsorship and leadership of key projects and initiatives
- Administration and oversight of operations, human resources, and budget within the identified portfolio and for Western Libraries as a whole
- Participating in Management Committee and fostering collaborative management across Western Libraries
- Supervision of Managers and/or staff positions as appropriate to the identified portfolio
- Representing Western Libraries and seeking collaborations and partnerships across the library system, Western University, and with consortial and other community partners
- Promoting and supporting collaboration, outreach and engagement activities of librarians, archivists and staff

Leadership Portfolios:

Assigned portfolios are comprised of one or more of the functional areas, with the specific assignments designed to balance the scope of operational, human and financial resource accountabilities. Areas of strategic leadership are identified below, however, they are in many ways a shared responsibility; they are highly inter-related and may cut across operational lines. The portfolios will change over time to support an efficient and agile organization that evolves and adapts to operational and university needs.

	Areas of Strategic Leadership	Operational Accountabilities	Sample Partnerships
Bobby Glushko, ACL, Research	Research & scholarly communication Faculty engagement: research and teaching Digital strategy: digital scholarship	Research & Scholarly Communication Teaching & Learning	Research Western Associate Deans Research Teaching Support Centre ITRC, eLearning and Classroom Technologies SGPS
Jennifer Robinson, ACL, Academic	User experience Student engagement Academic student success supports and services Library as learning commons	User Experience & Student Engagement	Student Experience: SDC, Wellness, SSC, Indigenous Teaching Support Centre Student bodies Associate Deans, Academic Registrar's Office Communications and Public Affairs Western International
Harriet Rykse, ACL, Content	Collections and content development and management Acquisitions budget management and strategy Digital strategy: digital resources, metadata and digital curation	Content Management, Discovery & Access	CRKN OCUL-IR Financial Services Institutional Planning and Budgeting Affiliated Libraries

Robin Keirstead University Archivist	Archival and special collections (includes integration across all core user functions) Donor relations Digital strategy: digitization and digital preservation	Archives & Special Collections	University Secretariat Communications and Public Affairs Alumni Relations and Development Archival communities
Roland Kriening Director, Administration and Operations	Finance and budgeting Personnel and employee relations Capital projects planning Facilities management Security and safety Communications and marketing	Administration and Operations	Institutional Planning & Budgeting Financial Services Human Resources and Faculty Relations Facilities Management Campus Police Communications and Public Affairs
James Ciesla Director, Library Information Technology Services	Information technology services, infrastructure and integration to support all functions Computing security Public and staff technology and support IT systems administration and analytics	Library Information Technology Services	Western Information Technology Services Faculty-based Information Technology departments OCUL

Implementation Strategy Development, Next Steps & Timeline

The report of the ORI Steering Team concluded with a number of strong recommendations specifically related to supporting a successful transition to a new organizational model. We will incorporate the recommendations into our approach but there are a few we would like to address upfront.

First, is the recommendation for a clear transition plan. We will develop the transition plan in an iterative fashion with our managers and in consultation with staff involved in the various stages and components of the transition. A preliminary plan is below.

Second, we acknowledge the importance of a clearly defined reporting structure while recognizing that the establishment of an integrated service model across functions and system-wide approach to User

Services will require adjustment. Each of us, including our management team, will need to work more collaboratively than in the past. We are committed to providing the necessary supports to facilitate this change in the way we work. The reporting structure is outlined above and is represented in the Organizational Chart.

Third, staff will need to understand expectations related to their responsibilities, roles, and new ways of working across the system. Role definitions will be made available for new or re-defined roles at the appropriate time in relation to implementation and appropriate training and development will be provided to prepare individuals for their new work. Roles may evolve as we transition to the new model.

Communication of Organizational Renewal and New Structure	Timeframe
Provost • Shared ORI Steering Team Report • Regular updates on progress	January - Ongoing
Human Resources • Consultation re. policy and processes for reorganization and collective agreement terms • Employee relations support – UWOSA and PMA • Change management • Invitation to All Staff Presentation	March 2017 - Ongoing
Faculty Relations • Consultation re. policy and processes for reorganization and collective agreement terms • Employee relations support – UWOFA • Invitation to All Staff Presentation	March 2017 - Ongoing
UWOFA • ORI Steering Team Report shared • Joint Committee updates • Notice and Letter of Understanding (LU) discussions • Invitation to All Staff Presentation	May/June 2017 – Ongoing
Deans Council and Provost's Cabinet • High-level overview presented • Executive Summary and Implementation Strategy	June 2017 Once complete - Fall 2017
UWOSA • ORI Steering Team Report shared • High-level discussion of new structure, staff impacts and plans • Invitation to All Staff Presentation	June 2017
PMA • ORI Steering Team Report shared • High-level discussion of new structure and plans • Invitation to All Staff Presentation	June 2017
Management Committee • Regular updates at MC meetings • Advance release of ORI Model and Structure documents	Jan- June 2017 June 20th

• Presentation and discussion • Ongoing support for work unit discussions of the planned new structure and processes	June 21st June 26- Ongoing
All Staff • E-mail updates • Release of ORI Model and Structure documents • All-staff presentation and discussion, Q&A • Q&A shared and feedback gathered • Open meeting Q&A with employee groups • Team meetings • Feedback summarized and shared	 Jan, Mar, May, June June 22 June 26 June 26- July 5 June 28 June 26-July 5 Early July
Campus Communications • New model and implementation strategy communications • Targeted messages and referral strategy to support smooth transition and service provision to faculty and other campus partners • Communicate service expectations to match new service design– e.g. create a web-based user's guide to services based on user needs rather than structure	 Ongoing Jan.- Aug 2018 By Fall 2018
Transition Strategy and Implementation Plan Development	Timeline

Staff Reassignment Identification and Recruitment
• Confirm Supported ORI Process (Letter of Understanding)
• Internal recruitments for functional Heads
• Reassignment option considerations
  ○ Librarian reassignments discussions and identification (R&IS, Faculty Libraries)
  ○ Transition to new assignments
• Recruitment for: Manager, User Services, Communications and Marketing Officer, Archivist
• Library Assistant reassignment discussions following development of new user services model (see below)
	
	By mid-July
	August – Oct.2017
	
	End July– Oct. 2017
	
	Staged over 17/18
	
	August-Jan. 2018

Implementation Plan Developed and Time-framed
• SLT and Management Committee develop implementation plan in consultation with functional staff
  ○ identifying key changes, timing and impacts
  ○ transitions for services, committees, projects and staff reporting relationships
  ○ considering work space implications and options
  ○ communications plan development
• Priority to development of new user services model (see below) and potential staged transition strategy from R&IS structure to new functions
	
	Iterative process
	Oct '17-Jan. 2018

Development of New User Services Model • Model design completed and role definitions refined • Staff training developed	Begins Sept. 2017 January 2018 Feb-March 2018

• Identification of secondary service locations for User Services staff • Training conducted for new model and secondary service location	By end of March Begins April 2018
Change Management Strategy	Timeline
Change Management • Managing change sessions for staff • Leading change sessions for Management Committee	 Aug. Staff Session Other TBD Fall 2017
Training and development • Each function will identify training needs and proposed approach and timing (building upon the competencies and areas of specialization identified in the ORI Working Group Reports) • Training in relation to new User Services Model • Team development – high-functioning teams, team leadership, communication and collaboration skills • Core competencies - Framework for Western Libraries recommended in the WAPI report	 Ongoing Begins April 2018 January -May 2018 TBD
Personal Supports • Discussions with supervisor • HR Courses and Learning Opportunities and Wellness Programs • Employee assistance program	 Ongoing

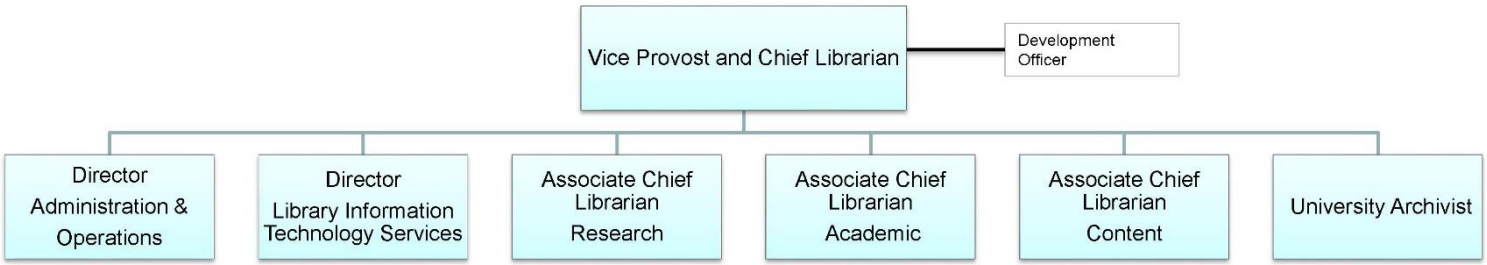
Appendix A – Organizational Chart

Organizational Chart

Western Libraries

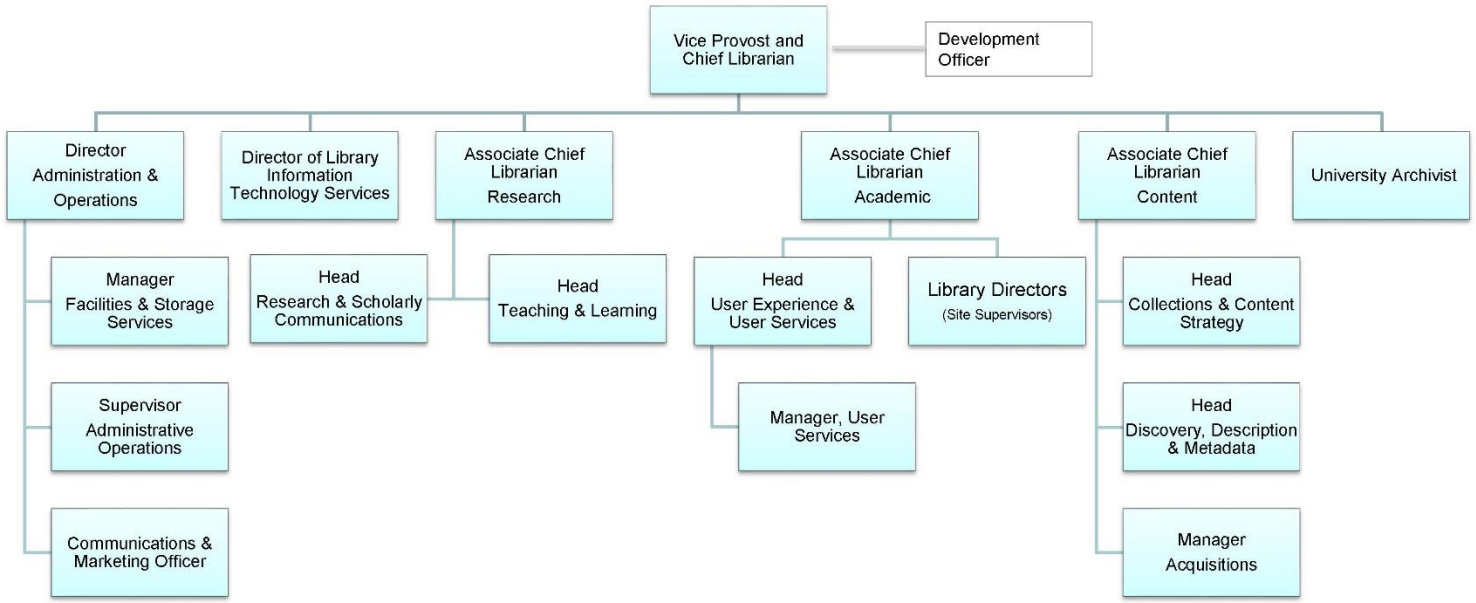
June 15, 2017

Senior Leadership Team



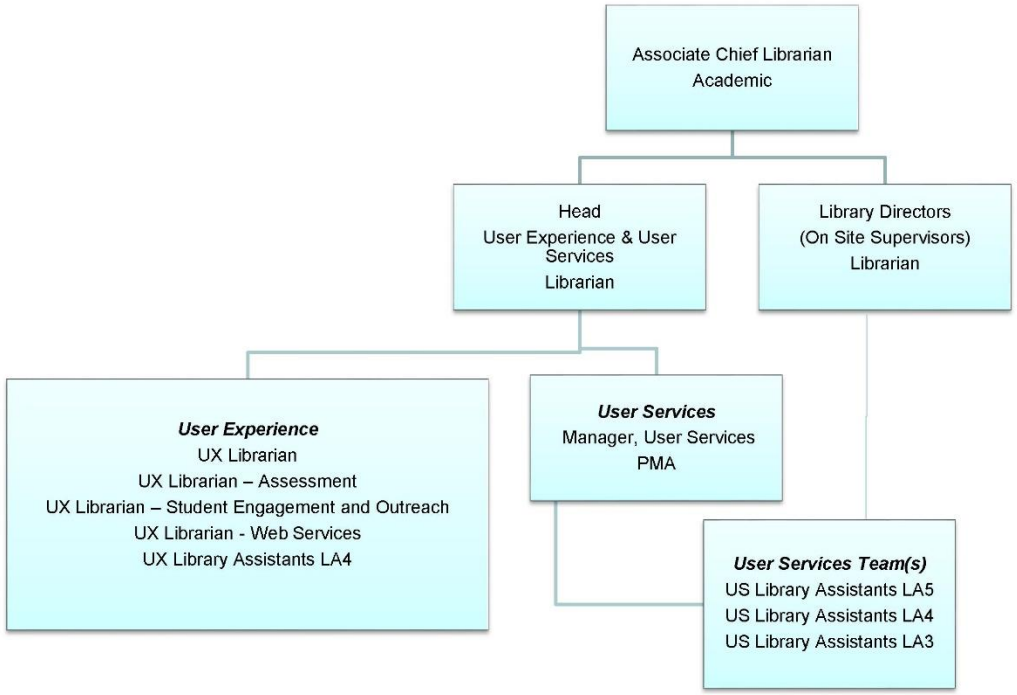
Western Libraries

Leadership Structure

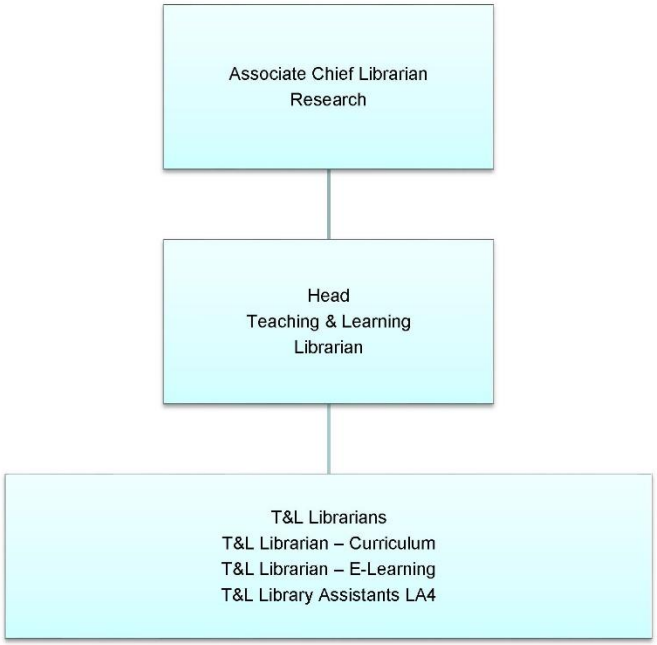


Western Libraries

User Experience & Student Engagement

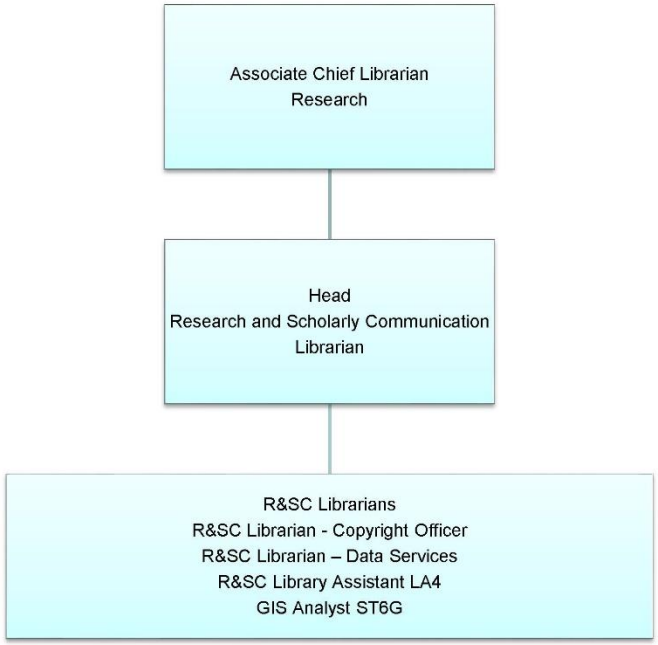


Teaching and Learning



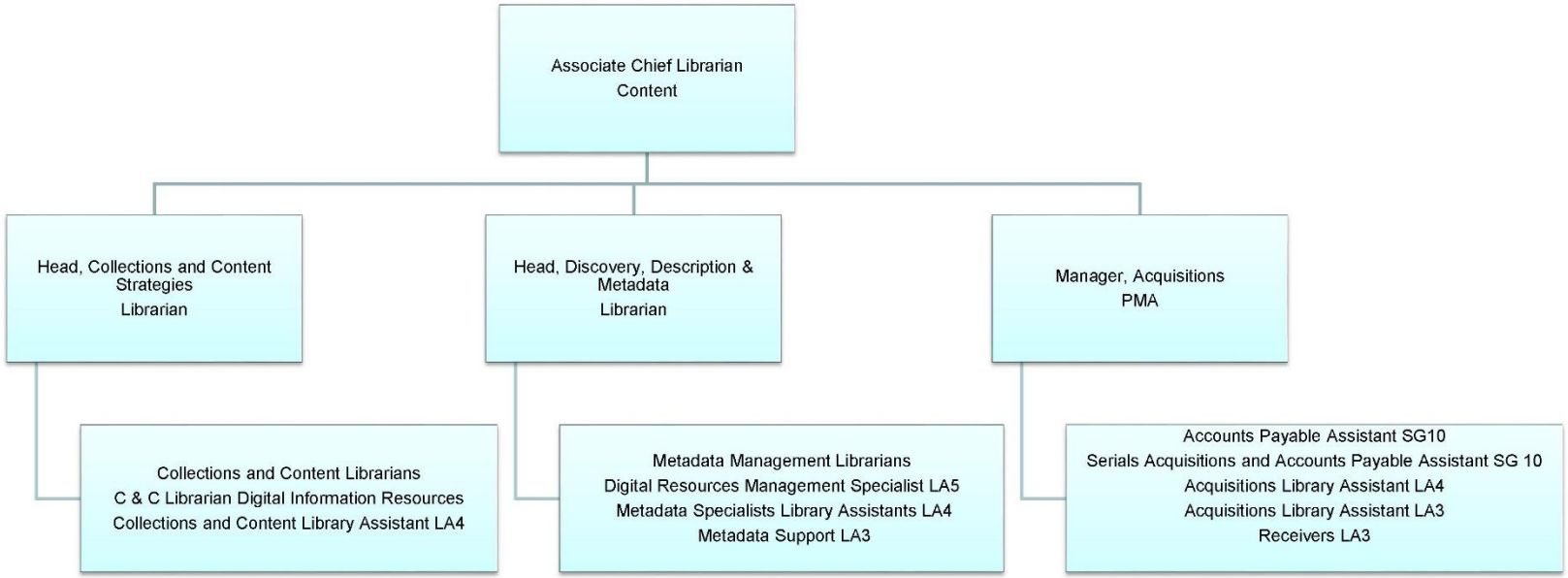
Western Libraries

Research and Scholarly Communication



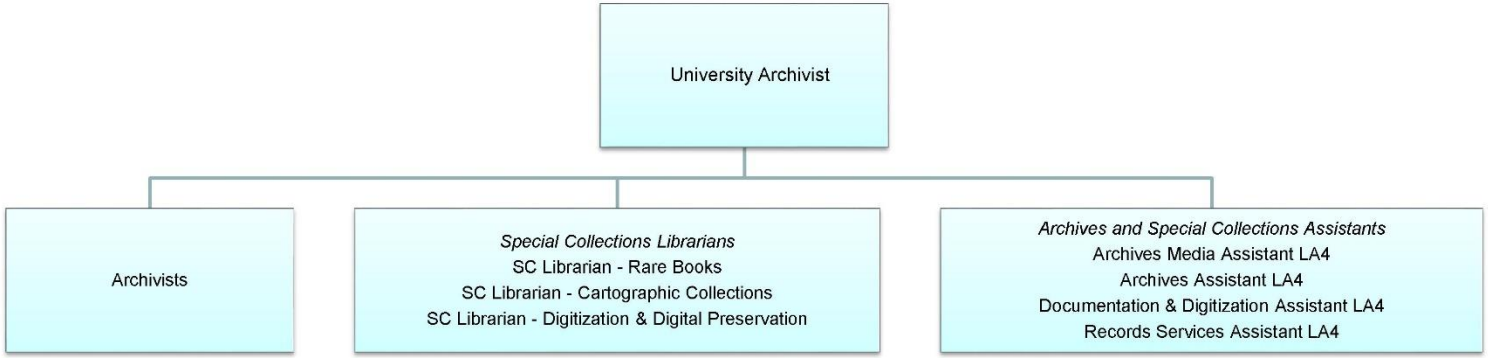
Western Libraries

Content Management Discovery and Access



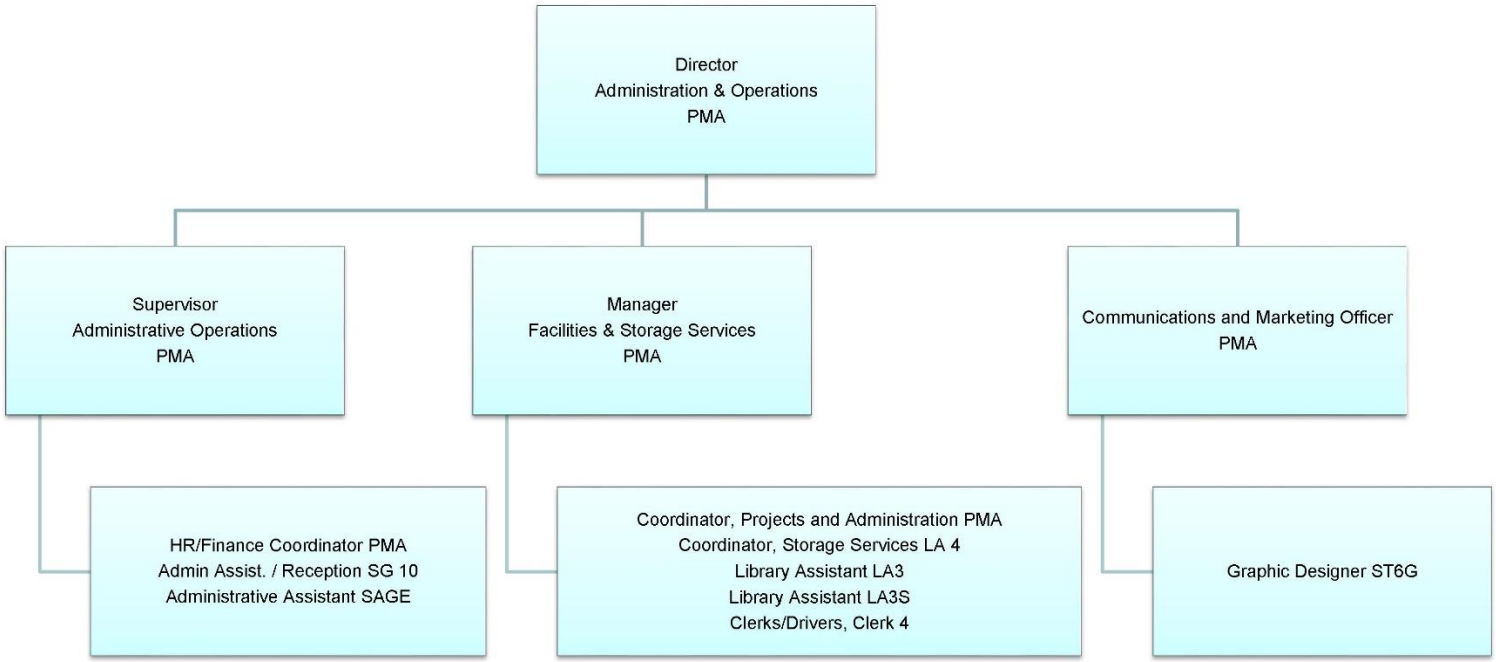
Western Libraries

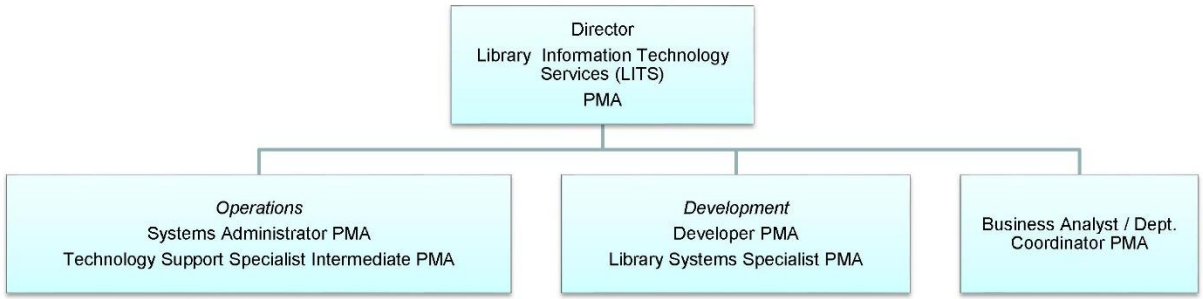
Archives and Special Collections



Western Libraries

Administration & Operations



Western Libraries

Library Information Technology Services