by Kejo Buchanan

Change Management in the Information and Referral Industry

My colleagues and I face a challenge common to many library and information services personnel: managing the change of evolving technologies and standards in our field. Perhaps you were reading a transit poster or listening to the radio mentioning 211, a telephone and online connection to community, social, health and other government services provided by partners in the information and referral (I&R) industry? Similar to other offices, Findhelp Information Services (the service partner that delivers the 211 service in Toronto) is one of those I&R agencies that faces the challenge of change. A closer look at areas of change and examining the two sides to the change management coin may help your own current or future transformation.

Challenges

Challenges arise on the introduction of a new format, method or device. At Findhelp, new challenges (or rather, opportunities) have been presented by discontinuing print and focusing on a digital directory. The new format affects the process for resource specialists like me, with how we research, update and index records published electronically.

As with other sectors in the information field, there is an organization that develops standards for I&R practitioners: the Alliance of Information and Referral Systems (AIRS). Through its participation in AIRS, Findhelp adopted a new way to conduct services and manage records, including indexing content and context with the AIRS taxonomy.

These changes do not arrive in isolation but often incrementally, as new technology or standards create further investment in upgrading. The final challenge is the introduction of an entire new system, the information management system. Findhelp had the advantage that these changes were introduced at different times, providing an overlap from one incremental advance to the next. Overlap allows for adjustment but could also delay success. Increased responsibility might not be matched with increased funding; strategic assessment and planning are necessary.

In researching the two main approaches to assessing needs and planning change, I spoke with Tedde van Gelderen, Founder and Chief Executive Director of Akendi, and Edmond Mellina, President of Orchango. These consultants provide insight into areas of change that need to be evaluated and the type of team you need to lead to a successful transition.

Assessing change

Van Gelderen describes change at three levels: the process affected, the tool to be implemented, and managing the change. The "process affected" involves studying the workflow, and he remarks that "some teams stop thinking at this point." However, perhaps your team is aware that a new tool is needed for effective transition to improved work processes. One of the approaches Akendi takes is to assess the effectiveness of the proposed new tool in light of user experience.

Changes in process such as a new indexing method, entailing the transferring of index terms from a small thesaurus to a large taxonomy, can be a daunting task. John Allec, Data and Editorial Services Manager at Findhelp, explains that starting from a personalized thesaurus of a few hundred terms and attempting to match with over 9,000 taxonomy terms needs a tool such as a crosswalk: a chart that functions as a guideline by illustrating the equivalencies from one standard to another.

A major change to a retrieval tool, such as moving from a print to an online directory, requires critical assessment, especially from the user's perspective. Lori Elliott, a Findhelp Resource Specialist, creates of list of user experience and design questions for this type of format change:

1. Has the *audience* changed? What are the needs of the web user?
2. How is the online directory *searched*? Searchable fields and indexing?
3. Should information be *presented* differently online? Amount of detail?

The third level is to manage the change, including the core principles of awareness, acceptance and integration. Van Gelderen notes that involving colleagues in the process of change, and using versatile coaching to address various learning styles, decreases resistance and increases the acceptance of integrating a new system. In my own experience, if we are well organized, with a specific plan and key players kept updated, people are willing to not only accept but also facilitate change.

The change management team

Edmond Mellina of Orchango approaches change management as though it were a boat, and calls his approach the "Balance of Rowing Principle." The two dimensions of change are the human and technical skills of the team, and communications. The principle refers to team rowing, where balancing skills and strong communication leads to optimal productivity.

Building a team to lead the change involves balancing skills such as training skills and data management skills. In the library and information field we understand the importance of having both technically skilled and socially skilled staff, to balance the everyday workings of the department. The same principle applies to the change management team – we need a balance of skills, but it is also imperative to have strong communication. The team has to be able to work well together through open communication, listening and respect.

In a previous, more traditional special library experience, I was part of a branch contribution to a head office initiative, involved in team training, data managing and assisting with the launch of a new integrated information management system. A similar concept was adopted, through the collegial makeup of the implementation committees. From local to international, committees were formed and all participants from the I&R community shared the power of change. Findhelp contributed by creating committees to manage change, to assess issues from print to online, and to train for indexing and new database systems. From this experience, I see change as an opportunity to participate on the team, and to attain a strategic goal leading to the next crucial steps.

Tips

The tips I've learned about managing change, from my own experience and in talking to experts and practitioners, include:

- Establish a clear goal, and assess all areas affected by the change.
- Assess which area creates the biggest challenge, so as to determine the next course of action.
- If you need assistance with planning the change, consult with a company that works on user experience or organization change.
- Build your own team to monitor and coach the transformation, perhaps using as a model a team that made a big impact in the past.

The key to managing change in the information and referral industry is goal setting, assessing and leading, while remaining inclusive and supportive to all participants.

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