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Managing the merger of archives and special collections : setting our own agenda.

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SEVEN

Managing the Merger of Archives and Special Collections

Setting Our Own Agenda

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At the University of Louisville, a merger of archives and special collections had been discussed for decades, but for a variety of reasons, always dismissed. There were practical reasons in favor of it, but there were some significant internal barriers that made it easier to keep things as they were. In 2012 things changed. Heightened appreciation for the traditional and emerging roles of special collections in university libraries, institutional budget concerns, key retirements and gradual replacement of people resistant to change, and an inclusive approach to planning all aligned to make the merger seem like a natural progression for the departments. After years of waiting, when we acted, we acted relatively quickly, creating the new unit in less than a year. Knowing our planning period was short, we also tried to put in place mechanisms and procedures for ironing out the kinks that we knew would crop up. Although we are still identifying and addressing those kinks, each member of our staff, our institutional colleagues, and, most importantly, our users express confidence that the merger is a success. We believe that part of that success was driven by the level of control we, as a group, exerted over the planning and execution of the merger. Our change was internally driven,

but we think our experience has value for departments who face a variety of motivations for coming together.

The University of Louisville had joined the Association of Research Libraries (ARL) in 2002, in no small part due to the strength of its archival and special collections. University Archives and Records Center (UARC), organized in 1973, and Special Collections, formed by the 1992 merger of the Rare Books Department (established in 1957) and Photographic Archives (established in 1962), held complementary collections but operated separate reference services on different floors of the same library building. This separation sometimes duplicated effort and often created confusion. Users had difficulty determining which service point to visit. This problem was often compounded by the workers at the reference and circulation desks on the main level of the library, who did not themselves understand the distinctions between the units. Even reference specialists in the archives and special collections units were not always knowledgeable enough about one another's collections to direct users toward related materials in the other. Donors struggled to understand differences between collections and determine the appropriate home for their materials.

Meanwhile, the libraries' Digital Initiatives Department, established in 2006 and folded into University Archives in 2007, began providing online access to collections from across the libraries. But although users were now able to search easily across collections, they soon experienced frustration with the separate units' differing ordering procedures and reproduction fees. In addition, although the ARL emphasis on unique primary resources had raised the status of the associated units, influencing deans and permeating the libraries' culture, more tangible support had not followed. The university's increasingly constrained budget was unable to keep pace with ever-growing needs for space, especially for climate-controlled storage space for collections, and staffing for reference desk coverage, collection processing, and cataloging.

Digital Initiatives also provided one of many examples of cross-unit collaboration that helped pave the way for a merger of the Archives and Special Collections units. In 2001 Special Collections and UARC, along with the music and medical libraries, had created a joint catalog of collection highlights as a showpiece for ARL application; later, ARL's 75th anniversary publication and annual statistics gathering provided additional venues for Archives, Digital Initiatives, and Special Collections personnel to work together, as did coordinated approaches to student orientation programs and a federally funded digital preservation grant.

Typically, however, it was the "worker bees," not the chief decision-makers in the units, who forged collegial relationships. The longtime heads of Special Collections' Photographic Archives and UARC had weathered many physical moves and administrative changes in the libraries and the university while developing their collections, cultivating

their donors, and serving their users. They felt strongly territorial. UARC actually existed as a separate library within the system, and its director guarded that autonomous status closely, concerned that association with Special Collections could give library administrators reason to fold UARC's budget into the general library budget or interfere with decisions. The photo curator, meanwhile, envied UARC's separate status but was unwilling to compromise his own departmental leadership role. Despite this resistance, merger was contemplated several times prior to 2013, as deans sought efficiencies and staff members attempted to explain why researchers needed to consult collections split across departments.

Personnel changes at the top finally opened the door to change. The heads of Photographic Archives and UARC had retired in 2008 and 2009, respectively, and budget constraints prevented their immediate replacement. The staff who served as acting heads welcomed the opportunity to overcome old attitudes and suspicions of collaboration. Increased workloads with stagnant staffing levels and budgets provided incentives for revisiting the possibility of a merger. When in 2012 the new dean of University Libraries offered a strategic plan with a goal of aligning organizational structure with strategic goals, merger of UARC and Special Collections again came up in discussions.

To the leaders of UARC and Special Collections, the time for merger seemed right. As the leaders of the four units that constituted UARC and Special Collections (University Archives and Digital Initiatives in UARC; Photograph Archives and Rare Books in Special Collections), we strongly supported merger, primarily because it would enhance the user experience. We didn't have the baggage our predecessors had. The Digital Initiatives librarian already had worked closely with Special Collections; the head of Special Collections had begun her career in University Archives. We met in February 2012 to discuss our integration into one library with combined services in a shared research room.

PLANNING

Although we had little fear that the dean would step in and micromanage a merger, by preemptively beginning the planning process, we hoped to maintain more control. Initiating the merger also offered psychological benefits. In addition to owning the whole process, all members of the units could see themselves as working toward an affirmative goal, not just reacting to demands coming from above.

At the first meeting, the "leadership team" affirmed our own commitments to merger, with an emphasis on improved access for users and an inclusive process honoring each staff member's identity and, to the extent possible, professional interests. The new dean had reaffirmed previous deans' positions of avoiding reductions in staff except through attrition,

so we could offer reassurance no one would lose their job. Their responsibilities might change, but we made a commitment that each staff member would participate in the process of redefining job responsibilities.

Our first step was a survey of other special collections and archives units that had undergone similar mergers. From 41 anonymous responses to an electronic survey advertised on the Archives & Archivists listserv in summer 2012, we learned that the majority merged both administratively and physically (at least for the service point), although not always at the same time. Most respondents emphasized the new, shared identity, while a smaller number sought to maintain traditional, individual identities. We decided to emphasize our new merged department through a new name, with associated signage, documents, and website, as well as through our single research room. But to avoid internal confusion and respect tradition, we chose to continue to refer to the collections as belonging to their original unit (and thus also avoiding the possibility of duplicate accession numbers across units).

The importance of good communication came up in a number of survey responses. Our survey had asked: "Does the new configuration work?" One respondent, referring to a recent merger, said it's "too soon to tell," but that it "makes sense. Colleagues can learn from one another, researchers benefit from related resources all in one place, potential to eliminate some duplicative efforts." Another wrote that the "merger enabled us to pool resources and created a larger department with a bit more lobbying influence in the larger library." Other respondents with longer views called it "a period of nervous transition followed by 20 years of success" and noted that volunteers and staff members who felt "protective of the other unit" or "not enthusiastic about the merger" presented challenges to the new unit's cohesiveness.

Others respondents commented that, like us, they still are vexed by multiple storage and office locations and would have opted for building redesign if they could have: "this isn't really a change so much as an ongoing, unsolved problem" and "staff are on 2 separate floors and there hasn't been a move to merge us together. This is less than ideal in many ways, but the most significant has been the merging of departmental cultures and procedures." Some concrete recommendations included documentation of decisions, formalized procedures, and cross-training, all of which we took to heart in our own merger planning.

Incorporating what we learned from the survey, the leadership team began outlining a process for merging the units, but we resisted making decisions without thorough discussion with the full staff. Since our first meeting in February, we had been reporting back at regular staff meetings of UARC and of Special Collections, being as transparent as possible. We wanted to ensure that merger—both the process and the final result—was the creation of the staff as well as the leadership. The first joint meeting of all 15 staff members was held in July 2012 and served as both

a planning session and an opportunity to voice concerns and hopes for the merged unit. We also confirmed each staff member's approval to move forward with a merger, and to an implementation date of January 2013. We sent questions ahead of time, asking everyone to talk about their current jobs and environment, and to identify their particular strengths and contributions. At this first session, we did not attempt to solve any problems; our goal was simply to get a sense of what work needed to be done and to let people air their feelings about the merger in general. This made us more aware of sensitive spots, where people might need a little more time and discussion in order to get acclimated to change. Some people felt particular ownership of functions or identities and worried they would lose these. Others sought reassurance that staff reduction was not part of the plan.

The issues and areas that emerged from this first meeting provided the basis for the formation of work groups. We identified issues that clustered together into functional areas such as reference, work spaces, virtual presence, financial and administrative concerns, publicity, accessioning, and digital and print reproductions, with preservation and processing postponed until postmerger. All staff members participated, volunteering for work groups based on their interests, skills, and job duties. For the next five months, these work groups met to discuss their particular issues and/or processes. Sometimes they proposed adopting existing procedures or policies of one of the units (as in Special Collections' well-established reproductions price list) or melding the two (as in expanding hours of reference staffing to cover all times either unit was previously staffed); in other cases, they created completely new structures. For example, early discussions around security and a reexamination of our regulations in general led to a new policy prohibiting researchers from bringing in notebooks (as opposed to loose paper); neither unit had such a restriction before merger.

Each work group reported its progress to the combined staff for discussion and approval, and shared notes and drafts in a network space available to all, providing transparency and enhancing participation by all staff members. The work groups made recommendations, but final decisions were made by the entire group, usually by consensus during monthly combined staff meetings. When there was a difference of opinion about a policy or procedure, we sometimes agreed to choose a particular path on a provisional basis with a commitment to revisit the decision. This wasn't just lip service: The policies, forms, and procedures developed during the planning period continue to be subject to change, and some have been discussed and modified since the merger.

One issue raised for us in the survey of recently merged repositories was that naming the merged library entailed consideration for sensitivities around identities of the preexisting units, including perceptions in communities beyond the university. While we intended to continue using

the traditional names for specific subunits (Digital Initiatives, Photographic Archives, Rare Books, University Archives), including their use within some individuals' titles (e.g., curator of Rare Books), we also felt the importance of having a new, corporate identity. We came to a consensus on Archives and Special Collections, with a reference pun in the acronym "ASC," and the additional benefit of placing us first in the alphabetical listing of university libraries.

Although the vast majority of decisions were made as a group, there were areas that had to be handled by the leadership team alone. Legal forms such as the deed of gift and copy service agreement had to be approved by the libraries' legal advisor, so were more efficiently handled by a smaller group of people. Our smaller group of subunit heads also made the recommendation to the dean that Caroline Daniels, the newly appointed director of UARC, be the director of the new library. This unanimous recommendation was proposed by the head of Special Collections, who, in spite of being senior by age, academic rank, and years of service, was willing to resume her previous position as curator of Rare Books. This decision was based on strategic and personal factors. The position of director of UARC held broader scope in the university, and we all recognized and valued Caroline's professional activity and leadership skills as being particularly suited for the demands of the new library.

In addition to planning an administrative merger, we also had to plan and execute a physical merger, as we had decided to combine our two research rooms into one. UARC and Special Collections were located in the same building but separated by four floors. Merging our reference desks seemed like an obvious way to gain efficiencies, since researchers often visited both locations. Since Special Collections had a traditional reference desk structure in a larger room, we decided to move all reference services there and devote the newly renovated UARC reading room to classes and presentations. The renovations to UARC's reading room included the installation of a flat-screen panel, useful for digital presentations. Both units had materials that were generally available to researchers, including reference books and a much-used collection of city directories. In addition, UARC had 23 filing cabinets of reference files and a microfilm reader/scanner to fit into the shared space. The physical space work group made cut-outs of each piece of furniture and equipment that the research room needed to accommodate, arranging them on a scale drawing. Once they determined the layout, we scheduled a moving day after final exams and just before the library closed for winter break. We accomplished actual moving of the filing cabinets and other materials with the assistance of student workers, all fueled by a pizza lunch.

We also created—at the dean's request—a proposal that laid out the new financial structure for the merged units, including moving Special Collections' endowments and cost recovery imaging services account to the new department. This proposal also described the new organizational

structure and confirmed that Archives and Special Collections would retain UARC's status as a distinct library. This document was created in order to enhance communications with the dean, as well as to submit our plans for his approval, but it was also shared with the wider libraries' leadership in order to clarify what would be changing in the merger. For example, there were fears that the newly combined unit would seek to "take over" special collections held in other university libraries; this document made it clear that those materials would stay where they were, under the jurisdiction of their current "owners." It also allowed us to commit publicly to making the new UARC reading room an educational and meeting space. This proposal was also shared with the university's Office of Communications and Marketing, who worked with us to spread the word beyond the libraries.

IMPLEMENTATION

In the proposal, we set a launch date of January 1, 2013—at that time, only three months away. The dean approved the plan immediately, and we intensified work on details of implementation. Since our primary concern was our user community, reference service was a top priority.

Our discussions, both in the larger group and within the work groups, made us aware of significant differences in how reference services were provided, which signaled a need for cross-training. This was also an area our survey respondents had emphasized. We addressed the issue by developing two programs: "ASC 101" and premerger reference "shadowing."

ASC 101 consisted of a short series of presentations designed to introduce us to how the other unit conducted reference services: everything from instructions given to researchers when they walked in the door, to searching the catalog, databases, finding aids, and other resources to discover relevant collections and how we permitted patrons to work with our materials. We saved session materials to the network server space for future reference.

In addition, all staff members signed up for at least one two-hour shadowing shift to work with a member of the other unit, observing interactions with researchers, identification of materials, and retrieval. The idea was not only to cross-train each other but also to build a greater understanding of why the processes were in place. For example, Special Collections staff members normally gave researchers a book support along with any bound item. University Archives staff members did not do this, because there were very few rare bound items in University Archives. During cross-training, UARC staff members learned why this was essential for the preservation of these books and would also help preserve less rare but nonetheless valuable materials. This enhanced

understanding provided a good basis for reference service in the merged environment, but it was also intended to contribute to the work of building new procedures and policies: If we understand why we do things as we do, we will do a better job of keeping necessary policies in place.

While working side by side, we got to know each other better. Working together to provide reference service made the future seem a little less foreign: We at least knew who we would be working with and what that would be like. We became members of the same team, inventing that shared future together.

Staff meetings offered another opportunity to create a unified team feeling. Having a social element to the meetings did mean that we occasionally drifted slightly out of focus—but laughing together, creating “in jokes,” and eating donuts helped bring us closer together and began to shape our shared culture. We continued this by adapting a tradition from the University Archives: Immediately after merger, we drew names to provide a card and treats for each staff person’s birthday. While bringing birthday donuts was a UARC tradition, it took on an ASC flair as people took pains to bring something the birthday person would particularly enjoy.

The first workday of 2013 saw the official beginning of Archives and Special Collections as a merged and distinct library. Doors to the shared research room opened at 8:00 a.m., an hour earlier than the Special Collections research room had operated in the same location. The single service point was staffed by two ASC staff members—one from UARC and one from the former Special Collections. This paired reference duty provided hands-on training with collections and services that were entirely new to employees of the previously separate units. When we lacked confidence in performing reference services, we had a knowledgeable partner to help us through the rough spots or make suggestions for additional resources. We initially had agreed before the official merger that two months of this staffing arrangement would suffice, but in fact staff members requested it be extended through March to continue training opportunities. By April, the majority of us felt confident enough to provide reference services for the expanded materials to be scheduled on the desk with whomever was available at the time.

Since the merger, our weekly staff meetings provide a forum for questions, concerns, and feedback. Throughout the week, the director encourages staff members to add items to the weekly meeting agenda, whether they are specific questions regarding collections and services or issues and observations. This approach has resulted in gentle reminders to use and correctly file newly instituted call slips, as well as in lively discussions reconciling the old units’ different approaches to how many boxes a researcher can have at the table or around what collection materials can and cannot be photocopied and photographed. Overall, the weekly meetings have been a productive way to discuss day-to-day operations, refine

new or changed practices and policies, and address any other issues brought up by the merger.

Prior to merging, both UARC and Special Collections hosted group and class visits in their respective research rooms, attempting, usually unsuccessfully, to not disturb patrons conducting research in the room at the time. After joining all services in a single reference point at the Special Collections research room, teaching and other programs moved to the UARC's former reading room. Initial resistance to moving ourselves and carts of materials between floors for reference or teaching faded as we realized that each room was ideally suited for its new purpose.

RESULTS

Three months into merger we realized that we had not developed a plan for assessing the impact of merger on our users and colleagues. We opted for quick and informal feedback, putting out a stack of paper questionnaires and inviting users to comment on their experience in the new ASC research room. The responses showed that users appreciated interactions with staff members, and one mentioned finding the new space "more welcoming." Respondents especially appreciated the combined expertise, and one researcher commented, "I like having archivists behind the desk and directly available to help." (Before, although UARC staff members' offices overlooked the reading room, the archivists themselves were "on call" instead of at a reference desk.)

Although most responses were positive, a few user concerns involved the unavoidable increased retrieval time for items held on other floors. Other user concerns quickly led to tweaks in the public space, such as moving city directories to a "self-service" space.

Staff felt some anxiety about new policies, but these fears proved unfounded once we learned to explain the policies to researchers with confidence. For example, staff feared that the new call slips, necessary to keep track of items moving between floors, would be a time-consuming imposition on researchers. Over time, however, we realized that if we avoid being anxious and apologetic about the slips, our users take them in stride.

At the four-month mark, the ASC leadership team created an anonymous, impromptu questionnaire to ask staff about their satisfaction with the course of the merger thus far and particular things they found better or worse; recommendations for what still needed to be changed or done differently; whether they felt their ideas and concerns had been heard and addressed during the process; and whether they felt any different or new job duties were appropriate for their positions or job classification.

With anonymous responses from 11 staff members, results were uniformly positive. In response to the question "Are you satisfied with the

course of the merger thus far?" all responded "Yes," with comments noting personal satisfaction with the process and enjoyment of learning new things.

Responses reflected consensus on the perception that users were appreciating an improved research experience. One wrote: "It's better that we're not 'silo-ed' and can take advantage of each other's expertise." Only one respondent expressed concern that lack of familiarity with processes and collections impeded work with researchers. This response, which included the phrase "still feel like a tag-a-long" suggested discomfort felt by an experienced reference person suddenly no longer completely in command of resources. That same respondent suggested what has since become standard practice: sending difficult reference questions by email to the entire staff for a collaborative response.

Responses to other questions uncovered good-natured concern about the amount of time devoted to the new unit's collaborative decision making but also revealed uniform agreement that each staff member's ideas and concerns have been heard and addressed. Because we had attempted to make sure job assignments included tasks or responsibilities especially dear to each staff member, all respondents reported satisfaction with their roles in the merged environment. At least at the four-month point, across-the-board participation and universal buy-in had been achieved.

To the final question "Is there anything we need to be addressing within the next 6 months?" respondents emphasized the ongoing need for integration through additional training and sharing of expertise, as well as refinement of policies, procedures, and shared network spaces. Two respondents mentioned the desirability of developing finding aids and enhanced public discovery for Photographic Archives and Rare Books nonbook materials; one respondent suggested, "Bring former Special Collections units into the finding aid culture of UARC." Other recommendations included creating marketing materials, reviewing fees and position classifications, and compiling a reference manual.

Amid the positive tone of all responses were tributes to colleagues: "I love all my new colleagues." "[I] am so grateful to be here and to have been given such varied opportunities." "I like that we're a team." The strong sense of affiliation established during the months of preliminary meetings and workgroups continues.

We also informally queried libraries' directors and unit managers about their impression of the new merged unit and our process. Their responses also have been positive. The advance work of announcing the intent to merge some months before the actual event paid off with directors and managers feeling that they had sufficient notice, although two respondents wished they had been consulted and not simply informed. One mentioned the proposal distributed prior to merger, appreciating that it gave "exactly the information our users would need." Respondents emphasized the desirability of having "one number to call; one

place to send people instead of bouncing them around," and recognized that having colleagues working in proximity was bound to produce a more comprehensive approach to reference. One acknowledged a twinge of jealousy at the excitement generated by the mix of colleagues and new approaches to work, adding, "This reflects well on the Libraries."

The dean's response at the four-month point was more measured: "It's a process." He appreciated that having one director meant one less person reporting to him, but more importantly gave a consistent voice and approach for development and fund-raising purposes. While he agreed that the initial communication plan delivered information to campus and extended communities, he also encouraged further work to unify the "face" of the new unit, with consistent identity materials and finding aids.

We still need to assess the experience of our donors, since they are stakeholders essential to our success. In the meantime, we have begun to work together processing, arranging, and describing a large multiformat regional history collection, given to the Photographic Archives just before merger and now benefiting from the combined expertise of archivists as well as curators. In addition, a new climate-controlled space, originally planned for Rare Books and funded in part by a Rare Books donor, has opened with a revised mission to accommodate works on paper from collections across Archives and Special Collections. The donor welcomes the attentions of the new director, as well as the larger staff ready to appreciate his contributions.

LESSONS LEARNED

We strongly believe that one of the key elements of our success was our ability to control the shape of the change. The prospect of merger had lurked in the libraries' consciousness for decades and seemed inevitable. While most of us saw many positive aspects to this change and even embraced it, we also had those moments of fear and trepidation that workplace reorganizations nearly always bring. Having some amount of control meant we—including staff members at all levels—had a role in designing the change we would inhabit. Although higher-level administrative staff in other organizations may make the decision that brings units together, the workflows and policies may be within the purview of the newly formed unit. Our advice would be to exercise as much control as you can, whenever you can, and share that power with all staff members.

Another key element in our process was relationship building. Most of us had not worked together on a day-to-day basis. Creating opportunities for people to get to know each other, and particularly to problem-solve together, worked to shape us into a team. While the work groups

played a role in this, the larger group discussions and reference cross-training may have contributed more. Keeping the coffee on one floor and a communal jar of animal crackers on the other has helped motivate us to move back and forth, transcending four floors of physical separation. The social element of our staff meetings also has been important. We are not all business all the time—in the rabbit holes of conversation, and in socializing before really starting the meeting, we have built a shared identity.

The heart of our work is reference duty and our commitment to offering shared research services has also been crucial to truly merging, as opposed to just sharing reference space. We often have different approaches to processing collections, for example, but in our shared research room, we have to share policies and be able to provide access to each other's materials. We all have learned from each other, regardless of years of experience or relative standing in the organization, and that has bonded us together. These shared experiences and the need to rely on each other has helped erase some of the lines between the units.

The relationships between the unit heads and other staff members are equally important. We asked them to trust us as we stepped out into the planning process, and by honoring our commitment to give them a voice in that process, we have earned the ability to convince people to give a policy a chance. When we say we will reexamine it if it doesn't work, they know we mean it, because we actually revisit policies.

The merger has required significant staff resources, but that has been the primary cost. Several tasks called upon significant amounts of time from individual staff members. For example, developing the reference desk schedule required about 5 hours; developing and analyzing the results of the initial survey took about 20 hours; and redesigning and updating the content of the webpages took 40 hours. All staff members spent about 8 hours in training. For most of us, however, time spent in meetings was the most significant cost. The joint staff meetings, attended by all 15 staff members, totaled 15 hours. The leadership team met for 6 additional hours, and the other workgroups, consisting of three or four people apiece, met from 3 to 8 hours each. For this six-month period, we diverted a significant amount of our effort to the merger. While reference services remained a priority during the process, some projects were temporarily de-emphasized. Otherwise, by incorporating procedures that allowed offices and collections to remain in place, the merger has involved no additional funding other than a modest amount for door keys. Costs for new signage were folded into the budget for the new climate-controlled space. And, as we planned, it has not resulted in any reduction in staffing or funding.

In retrospect, we regret failing to properly assess response from our users, colleagues, and donors. Informal questionnaires, created on the fly, affirmed our good feelings about the merger but do not provide helpful

data for going forward. Since we have worked in the merged library less than a year, however, it may be worth the time and resources to undertake a formal assessment in order to improve service and further improve the experience of our staff.

One surprise was the extent to which library managers outside the unit feel ownership of the collections and functions of ASC. One administrator commented: "So much of our future is in archives and special collections." We in ASC believe this, but now will try to be more sensitive to the sense of affiliation colleagues outside the unit feel with us and our collections. This may also account for the feedback we received from the managers who thought they should have been consulted rather than just informed about the merger.

CONCLUSION

The future of Archives and Special Collections appears bright and busy. Ten months after the merger, we will mount an expansive, co-curated exhibition of popular railroad material pulled from UARC, Rare Books, and Photographic Archives collections, to be held in various display spaces throughout the library as well as on the web. A large opening reception for the exhibition will be the public celebration of the newly formed Archives and Special Collections. We also plan other new initiatives within ASC: preservation workshops for the public, cross-unit collection building, and an "open house" event to introduce university staff and faculty outside of the libraries' system to the numerous services and materials available through ASC.

We continue to make small adjustments to procedures and are at work on larger tasks, like creating promotional materials and streamlining electronic access points. Proud of our accomplishments thus far in the merged environment, we are confident that our many hands on deck will make light work of these tasks as well. Our commitment to the process, and unwavering emphasis on seizing the initiative, involving staff members at all levels, constant communication—and the frequent provision of donuts—will carry us through.

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Management

Innovative Practices for Archives and Special Collections

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