Leadership for success in the digital world

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Abstract:

*Librarian leaders are at the forefront of organizational success. They drive the organization to
reach new heights of service and success through their vision, commitment to service excellence,
and the ability to develop strong relationships with internal and external stakeholders. Although
cooperation with a wide range of entities has long been a part of our professional ethos, the
digital era is changing the environment in ways that support and require libraries to go beyond
the boundaries of cooperation to deep collaboration, or in the words of some leaders, radical
collaboration. In this presentation, the authors illustrate with selected cases how librarians are
using and adapting traditional leadership skills and values to achieve organizational success
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Text of presentation

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endeavors and transforming them, at least some of them, into deeply collaborative activities. Today, we are illustrating with selected cases how librarians are using and adapting traditional leadership skills and values to achieve organizational success through deep collaboration.

Welburn argued in a paper given before the Texas (USA) Library Association:

> "It is imperative that we define academic library leadership far and beyond the confines of the library's walls. We need to think not of academic library leadership exclusively, but of academic leadership more broadly. And we should think of academic leadership as the way that we relate across our campuses and in our state and regional, national, and global networks."

Using the work of Joan Magretta, she continued that human purpose is what animates organizations, and as Magretta maintained, the responsibility of effective leadership was to seek ways to transform human purpose into performance. To do so requires careful attention to the skills and virtues that are vital in exercising leadership.

Critical leadership skills and virtues

Before turning to the how's and what's that leaders in successful organizations are doing to create the opportunities for success, let's briefly revisit some of the most critical leadership skills and virtues. There are many theories about what makes a great leader and a wealth of books, some classics in the field and some of more recent vintage which reflect on organizational success stories, globalization or technological advances. Our list of leadership skills and virtues is not comprehensive. Instead, we selected skills and virtues of particular importance in supporting collaborations. They are:

1. Vision and passion
2. Ability to motivate
3. Build trust as the foundation of relationships
4. Communicate clearly, listen and talk
5. Be accountable for the big picture, support employees in successes and failures
6. Strengthen collaborative relationships and responsibilities for such activities throughout the organization
7. Act with integrity, appreciate the broad context, institutional and professional values
8. Act with civility and respect – find value in your team getting inspired by your team, encouraging your team to communicate, brainstorm and be open, find the common journey shared by everyone in the organization

Robin Ely and her colleagues have concluded that leadership enables others "to be maximally effective in service of shared goals." This summarizing approach ties the skills and virtues of leadership together in such a way to relate the efficacy of leadership to collaboration. Leadership gets organizing going and sustains an organization over its life cycle (Welburn).

Driving deep collaboration

We have organized our presentation into three parts illustrating what leaders do and the results of using their skills to drive deep collaboration. Achieving success through deep collaboration applies to consortiums or alliances consisting of many members, such as the Catholic Research Resources Alliance (CRRA), as well as to individual libraries within institutions, such as Marquette University Raynor Memorial Library. Today, we use activities of CRRA and Marquette as primary cases with reference to other cases as helpful in illustrating individual as well as organizational actions that drive success through deep collaboration.

- Part 1. Articulate a compelling vision for organizational success through collaboration
- Part 2. Develop a broad understanding of challenges, opportunities, requirements and benefits of collaboration
- Part 3. Set the stage for library participation in radical collaboration

Articulate a compelling vision

When I was the library director at the University of Notre Dame, I was fortunate to have the Rev. Theodore M. Hesburgh, president emeritus of the University and a most distinguished leader recognized worldwide for his work in furthering world peace, as my mentor. He said to me: "dream big, know where you want to go, have a strong and clear vision. That's the essence of leadership." The most powerful of visions will communicate the need for change and describe the desired outcome. In this way, a vision will enable others in as well as out of the organization to orient their thinking and activities to move toward the desired future. The most effective visions will embrace, and build on, the fundamental values and contributions of the organization. According to Michael Gorman, a distinguished scholar and recent past president of the American Library Association, "librarianship is a profession defined by service" (Gorman, 2000, 75). Everything we do comes from the idea that we are providing services to individuals, communities, society and posterity (Gorman, 2000, 26).

Since the CRRA's founding in 2008, the participants have reached significant milestones in carrying out the mission of providing enduring, global access to Catholic research materials. Approximately 100,000 items are discoverable via the portal, there is evidence of use from around the globe, and the network of participating institutions has grown from the original eight to over thirty. In looking ahead, Janice Welburn, chair of the Board of Directors, and I, the executive director – saw that we needed to continue doing what we were doing but at the same time, we realized those were yesterday's goals and achievements. New and continually evolving developments and practices in business, technology and science, arts and humanities, education and research, and society as a whole create the environment in which we operate. What we see all around us is collaboration. It is impossible to find even one issue of a business or trade magazine in which there isn't at least one article about how partners are working together to create a better product or service. Perhaps even more importantly, this is the environment in which library patrons, students and scholars work, and their expectations for what and how we deliver services to them have more to do with their experiences with other organizations than they do with their experiences in using libraries.

We believed the CRRA would benefit from a new and strengthened vision, one that would allow us to build on what we had done while positioning us to take advantage of new technology, partnerships and opportunities, and a strategic plan to direct our goals. We talked with our colleagues on the Board, on committees and members at large, and with their advice, set up a strategic planning task force. We identified key principles, assumptions, and questions and charged the task force with:

- Interpreting challenges and opportunities for tomorrow's world,
- Understanding user needs and expectations, and
- Articulating how the CRRA can deliver value to its constituencies.

The task force met virtually for six months during which time they consulted with domain experts, and gathered input from CRRA members, scholars and other portal users. Its deliberations led to an ambitious and inspiring vision: "The CRRA will foster a dynamic scholarly community by: creating the freely available portal to Catholic research resources in the Americas; sustaining the distinctive network of libraries, archives and other institutions that enable the vision; and facilitating internationally the sharing of resources of scholarship" followed by a succinct mission statement: "to provide global enduring access to Catholic research resources in the Americas." Together, the vision and mission communicate the purpose to our members as well as to individual scholars, students and other organizations, and shape their understanding of how they can be served by the CRRA. The strategic directions, initiatives and mission-critical outcomes in the five year plan provide a more fully articulated framework for carrying out the mission and delivering value to stakeholders. With this strategic plan, the CRRA committees and task forces will develop their annual goals. Our work, that of Janice and myself, was giving direction and support to the task force: communicating, motivating, strengthening internal collaborations and respecting their work.

Part 2: Develop a broad understanding of challenges, opportunities, requirements and benefits of collaboration

Cooperation is in our DNA yet we are understandably cautious in exploring opportunities for deep collaboration. One model outlines five stages, from the initial stage of contact, through cooperation, then coordination, to collaboration, and shows how in advancing through the stages, the participants integrate their vision and goals to the point where they become a new vision with shared goals. Ultimately the fifth stage and end point is convergence, in which the new vision, goal and activity have become part of the underlying system used by all of the partners (Zorich 2008, 11-12). WorldCat is one example. The cooperative cataloging initiative started by Ohio library leaders has grown to become a shared community resource, created and sustained by its members, and serving as an essential metadata repository and registry of holdings in the global library and information services system.

In cooperative endeavors, individual libraries usually made only minimal changes in their operations (adherence to activity standards being a major exception) and retained substantial autonomy in determining their own goals. We contribute bibliographic data to union catalogs and participate in interlibrary resource-sharing because these are ways to advance our goals of cataloging our library holdings and giving patrons access to materials not in our own collections.

Collaboration is more ambitious and harder to achieve. One reason, in the view of Ken Soehner, Chief Librarian at the Metropolitan Museum of Art Thomas J. Watson Library, is because true collaboration "devises a new vision for a new way of doing things. It inevitably and fundamentally involves change. Collaboration is transformational and the elements, institutions and individuals involved in collaboration must change" (Soehner 2005, 7). Whereas cooperation is a means of achieving an institutional goal, collaboration is an intersection of institutional goals such that the individual goals become a single goal, thus transforming the desired result and way in which the partnering institutions work. The rapid acceleration in "last copy" programs is a good example of the movement from cooperation to collaboration as the libraries integrate their individual preservation goals into a common goal of ensuring the preservation of titles to be owned and shared by the circle of partners. Their individual goals informed and were absorbed into a common goal with the result that the integrated whole is truly greater than the sum of its parts.

Requirements of radical collaboration

Deep collaboration brings great benefits. It isn't at all surprising that deep collaboration requires partner investment and brings new elements of risk. The term "radical collaboration" underscores the necessary shift in thinking and this is the time when we too shift to the term "radical collaboration." Jim Neal, Vice President, in an influential essay, identified requirements for radical collaboration. They are:

- Bi- and Tri-Lateral Combinations
- Sustainability/Business Plan
- Legal Framework
- Governance Structure
- Risk Capital
- Competitive Spirit

In practice, these are familiar elements of institutional operations but in working across institutional boundaries, must be set up for the new collaboration. He gives the example of 2CUL in which Columbia and Cornell University Libraries set up a legal agreement, governance structure, contributions of capital and a business plan (2CUL). Similarly, shared storage facilities such as the Washington Research Libraries Consortium (WRLC) have established their programs with careful attention to the responsibilities and obligations of each participant and legal arrangements that undergird member participation and sustainability (Jacobs).

VuFind, a next generation discovery portal of which the first version was released only in 2010, is becoming a market-leading alternative for library resource discovery. So much so that a group of developers and implementers were motivated to address issues of project structure, administration and governance, in addition to defining technical development priorities (VuFind 2.0). The fact of spreading adoption brings with it the need for a formal framework to provide a conduit for funding and institutional support, participation and direction.

Benefits, risks and investments in a common mission

As important as radical collaboration is, and will be in achieving future organizational success, a deliberate approach is needed for appropriate exploration of where radical collaboration is likely to be beneficial. Cooperative activities provide a good starting point in that these are activities where institutions are already seeing the benefits of working with others. When the prospective partners engage, the first conversations consider similarities and differences in mission and look for how coming together would support efficiencies and better services. As noted earlier, however, true collaboration means developing a new vision and common mission. Embedding the institutional mission in a common mission where mission and goals are not mine, not yours, but ours, calls for thoughtful and candid discussions of partner expectations, goals and definition of success. There are excellent examples in which the partners explain why they are collaborating, the goals, activities and measures of success (2CUL). The investment can be steep, extending into the hundreds of thousands of dollars to provide the mission-critical service, which include implementation of technologies to support digital collections and share campus scholarship, and offsite storage to free valuable space in the campus libraries (WRLC), but then so are the benefits. It is far more cost effective to share a last copy collection with seven other libraries in a shared facility than it is to build one's own facility for housing collections.

Thus, it also becomes clear that when you are participating in a collaborative project which is carrying out activities integral to the services for your community but which you do not fully control, that your investment in the collaboration must include a commitment to success for all. "The last value is that each member of the collaboration should achieve some measure of success from the project. This doesn't mean that outcomes need be equally beneficial, but there should be at least some reward that accrues to all participants in the collaboration" (Carpenter). The risk in any collaboration is that one or more of the partners will decide to bow out completely. Ordinarily, the legal agreements require advance notice sufficient to allow the remaining partners the opportunity to consider how the collaboration can continue in the absence, assuming this is possible, of any single partner.

Mandates and expectations from external governing and advisory bodies

Since early in the twentieth century, cooperative programs have successfully reduced operating costs for participating libraries and enhanced library services for users. The level of satisfaction among participants with these cooperative programs has been generally high, until recently that is when universities and research libraries encountered extraordinary challenges on multiple fronts –severe budget cuts, high expectations of students and faculty for immediate access to knowledge resources, and the large costs of realizing the promise of digital technologies for transforming libraries. The gains from cooperative programs could no longer make sufficient progress in solving these issues. Presidents, provosts, and community leaders are calling for transformative priorities that will advance institutional excellence into the future and for collaborative priorities as one strategy for going forward.

It was the state of Ohio Board of Regents that mandated implementation of the Library Committee's recommendation in 1987. The recommendation was that "the state of Ohio implement, as expeditiously as possible, a statewide electronic catalog system" to enable greater

sharing of library collections (OhioLINK). The Board of Regents had in mind creating greater efficiencies through one system than could be achieved through individual efforts. Similarly, the University of California President called for the building of two book and journal storage facilities to contain the costs of each of the nine campuses building its own. Since then, the University of California Libraries are again in the collaboration forefront with the development of a shared print archive of licensed e-journal content at the Center for Research Libraries (Reilly 2009).

With a strong presidential call to action, the Center for Library Initiatives of the Committee on Institutional Cooperation, which itself has a long history of cooperation, is forging ahead with new, even bolder initiatives such as the building of a shared digital repository, the HathiTrust forged around a common vision and mission of optimizing access to information and creating a collaborative environment where library staff can work together to solve their mutual problems" (Committee on Institutional Cooperation).

The leadership and support of these governing bodies was, and is, essential. If collaboration is to reach its full potential, the collaboration must be transforming in bringing about a new vision of a common mission and the governing boards must lead and support such transformational priorities. Library leaders too are important as they interpret and lead the collaborations within the libraries as well as build relationships with their other campus advisory bodies. Such advisory boards are common to all of us. Although they do not always have the formal power to approve budgets nor are they always required to approve policies, they are an important entity in ensuring just as we do for our individual institutions that we are going in the right direction." For the Catholic Research Resources Alliance, one of our first acts was setting up a Scholars Committee and a separate Leadership Council to advise us on directions and strategies.

Part 3. Set the stage for library participation in radical collaboration

Some in the organization will identify ways in which radical collaboration could greatly improve services or library operations. At the same time, others, perhaps even the majority, are by nature more cautious about investing their energy in understanding and supporting change that disrupts their responsibilities and the way in which they work. Radical collaboration doesn't usually happen without the active promotion and support of leaders. Within individual institutions, the library leaders employ the full range of leadership skills and virtues in setting the stage for library participation in radical collaboration, beginning with articulating their vision and developing a strategic plan as was discussed in Part One. The steps leaders take including the following:

1. Articulate how digital content, services and tools will support and require radical collaboration.
2. Identify collaboration as an organizational value
3. Set transformative priorities
4. Establish common ground with potential partners
5. Commit to developing common goals with individual or group partners
6. Engage the user community
7. Allocate resources
8. Support risk-taking and learning from failures

9. Celebrate individual and team success

We are not suggesting this is a sequential list of steps but rather a collective identification of familiar activities that build a foundation for radical collaboration.

Recent experiences at Marquette University's Raynor – Memorial Libraries may provide a useful mechanism to illustrate the value and meaning of deep collaboration among academic libraries with common goals. Raynor – Memorial Libraries has articulated its strategic priority of engagement as follows:

> "We strengthen our role as leaders and in partnership with the University's colleges, academic departments, and other campus units through library initiatives designed to advance teaching, research, and inquiry. In addition, the Library is positioned to be integral and essential to the global community of scholars and learners, who seek out our services, collections, and expertise."

By setting its priority of engagement in this way, the Libraries are able to pursue simultaneously a twofold strategy of internal interactions with scholars and learners and external collaborations with libraries and consortia working toward the same objectives. The primary difference between recent and earlier initiatives has to do with the depth of collaboration that acknowledges interdependence and more dynamic and sustainable platforms for sharing resources.

Within the Marquette University community, the libraries have cultivated collaborations that heretofore might not have been doable or practical. Working with Alumni Relations, the Libraries have arranged a long-sought extension of database access for alumni. The access includes two large EBSCO databases: *Academic Search* and *Business Source*, together offering more than 3,500 full-text scholarly journals and trade periodicals.

The Libraries have also formed a joint initiative with Marquette University's Graduate School and Writing Center to design a space within the library to be used by doctoral students engaged in any type of writing, either individually or in small groups. By giving over precious space, the libraries have contributed to the Graduate School's ongoing efforts to increase support for thesis and dissertation writing. The Writing Center is also contributing by offering writing workshops that are open to all graduate students utilizing the space.

Recognizing an imbalance in access to information and communication technologies throughout the Marquette University campus, the libraries also developed and recently opened a Digital Media Studio. Through resource allocation to the studio, the libraries insure a service available in some but not all departments and colleges throughout the campus. The element of risk that is now paying off is that the campus' Center for Teaching and Learning has turned its full focus to the need for faculty development in the use of technologies in teaching and scholarship. The center no longer supports students, and it envisions partnerships with other campus departments and colleges, such as the Dietrich College of Communication, on developing future academic technology support.

Turning to Raynor – Memorial Libraries' work with external groups, a significant collection of rare books owned by the St. Francis de Sales Seminary's Salzmann Library is now available within the Libraries. A partnership between Marquette and the Archdiocese of Milwaukee led to the transfer of 900 volumes. The arrangement offers advanced scholars more convenient access, and an environmentally-controlled vault provides improved security for these cultural and intellectual treasures.

Ivan Gaetz and his co-founders of the online, open access journal, *Collaborative Librarianship,* recognized "that collaboration is a fundamental value in the practice of librarianship and that it takes many forms, from in-house to consortia cooperatives and beyond" (Gaetz). At Marquette, we have incorporated the value of collaboration into the way in which we seek opportunities to improve our services and as opportunities come our way from others on campus, in the city or state.

With the knowledge that collaboration will allow us to really "think big" as Rev. Hesburgh asked, we are willing to set transformative priorities that provide the ambition and reasons for collaboration. We have long participated in many cooperative programs, beginning with cataloging, interlibrary loan, and consortial purchasing. These cooperative programs successfully reduced our operating costs and enhanced library services for users. For the most part, Marquette University needed to make only minimal changes in operations (adherence to activity standards being a major exception) and retained substantial autonomy in determining its own goals. We were generally satisfied, until recently that is, when Marquette, as did other universities, encountered extraordinary challenges on multiple fronts –severe budget cuts, high expectations of students and faculty for immediate access to knowledge resources, and the large costs of realizing the promise of digital technologies for transforming libraries. We saw that the gains from cooperative programs could no longer make sufficient progress in solving these issues. We have joined forces with our president, provost and advisory committee in setting transformative priorities that will advance institutional excellence into the future and engaging in more extensive collaborations as a strategy of choice for realizing our ambitions.
We are finding that because we believe in collaboration, it is easier than we anticipated to establish common ground with potential partners and to commit to common goal with individual or group partners.

A collaborative effort titled "The Catholic Social Action Project" between Marquette University Libraries, Catholic University of America, St. Catherine's University, and the Catholic Research Resources Alliance, received a grant of $149,000 from the Council on Library and Information Resources (CLIR) Cataloging Hidden Special Collections and Archives program. The project was one of 14 selected from a total of 91 applications. Archivists and catalogers will create EAD and/or MARC records to expose three previously "hidden" collections with similar themes--U. S. Catholic social action in the 20th century. St. Catherine's Ade Bethune Collection includes the archives of the liturgical artist and social activist; Catholic University holds the Catholic Charities, DC records; and Marquette's more than 700 audio recordings within the vast Dorothy Day-Catholic Worker Collection document the faith-based movement of Dorothy Day and Peter Maurin. Together we have created a collection far greater than any of us could do individually.

Beyond the work accomplished with financial support from CLIR, Marquette's deep collaboration through the CRRA will also advance the transfer and access to other unique and somewhat hidden collections across member institutions. Among the examples drawn from Marquette University's collections are:

- Digitization of "I'll Tell You a Story: Memories of Pre-Holocaust Europe," an in-depth collection of oral history interviews conducted in 1983 by a group of volunteers from The Generation After, an organization of children of Holocaust survivors.
- Continued development of our electronic theses and dissertations, including digitization of Marquette master's theses in selected disciplines dating back to 1922
- Ongoing support of a digital repository of faculty publications, which as of January 2012 included over 1,600 journal articles, book chapters, and citations to Marquette University faculty work
- Digital and bibliographic access to other unique collections, including portraits by writer/photographer Carl Van Vechten and to newspapers and other materials reflecting the work of Catholic missions on American Indian reservations

Each of these examples requires not only a commitment to working collaboratively in sharing expertise and resources, but also call for levels of engagement with community partners grounded in trust and integrity. They require exercise of leadership skills and virtues throughout the library to ensure the trust of others in our stewardship of the intellectual property. We are committed, however, to collaboration as a transformative activity, asking ourselves can we do new and important things together more effectively than alone?

Concluding remarks

At the end of the day, we as librarian leaders use our traditional leadership skills to describe our vision for the library's success and to create new understandings of how our commitment to service excellence can be realized through radical collaboration. We set the stage in our own institutions and development of effective relationships with internal and external stakeholders. We do this because the genius of the library profession lies in what librarians do to make library resources as accessible as possible "(O'Donnell). Thank you. You have been a wonderful audience and we look forward to further discussion with you.

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