A Delicate Balance:
Fostering a Collaborative Work Environment in the Life of a Merged Library

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Introduction

Academic library mergers have been a reality for decades, often the result of financial constraints that require a reduction in either staff, spaces, or both, combined with many nuanced local reasons. These mergers have positive and negative ramifications but always involve a central desire to maintain or improve services. This chapter examines the successful integration of liaison librarians brought together through the merger of the Life Sciences Library (which served the Faculties of Medicine, Dentistry and the Department of Biology) and the Schulich Library of Physical Sciences and Engineering (which served the Faculties of Science and Engineering), at McGill University.

McGill University is a public university with a majority of its funding coming from government transfers. In late 2012, unexpected and significant budget cuts forced the university to introduce a retirement incentive for administrative and support staff. As a result, the library system lost many employees. Administration re-examined staffing requirements, redistributed tasks, and evaluated expenses. By April of 2013, the dean of libraries decided to close the Life Sciences Library space and merge the staff and collection into the Schulich Library of Physical Sciences and Engineering (Schulich Library). The Life Sciences Library staff were given the news without explanation beyond it being for budgetary reasons and were asked not to share the information.

Nevertheless, the news leaked out before an official announcement, and, lacking in information, faculty, students, and staff rallied and demanded consultation. Briefly and hastily, a representative from the library and one from the Faculty of Medicine led a consultation and submitted a final report by the end of May 2013 endorsing the closure/merger of the library (Boruff, Hanz, Holder, Kucij, Lange, & Lannon, 2015).

Background

All organizations have a history—events that happen over time—and some of these events have a long-lasting effect on culture. McGill University is no different, and while it is not necessary to dwell on minute details, some background information is useful to help set the context for the hurdles faced during the integration. In September 2013, after decades on location in the medical building, the Life Sciences Library closed its doors and merged into the Schulich Library located a ten-minute walk away on the side of campus traditionally dominated by science and engineering. Obviously, any modification to one's place of work drastically affects the sense of belonging to a community and is accompanied by understandable anxieties of what is to come (Mintzberg, 2011). This sense of belonging is necessary to the life of a healthy organization, and dealing with its loss is too often overlooked. In addition, the closure of a library space elicits emotional responses from users and staff, especially when the decision seems sudden, and this was no exception.

As would be expected, the administration gave immediate attention to the many practical aspects of moving collections and staff. To understand the implications of the rushed process, it is useful to view the change through the lens of William Bridges' transitional model for change management (Bridges & Bridges, 2009). Bridges and Bridges' book goes deeper into the model and the phases of each transition. To summarize, the model includes three stages: the first is the "Endings" stage which marks the beginning of the transition, or the end of an activity such as the closure of the library (Bridges & Bridges, 2009). It is this phase that most affects people's psyches, where they mourn what they will be losing before even entering the transition. Endings can be extremely difficult and send people into a grieving process that, if unacknowledged, can greatly affect the success of the change. Unfortunately, it is often the most overlooked stage, as was the case with this library merger. The energy and time needed for moving furniture, integrating collections, and assigning spaces meant that administration gave little attention to the emotional and personal toll of the transition, leaving the librarians and support staff feeling unsupported.

Difficult Transition

In addition to personal anxieties caused by the loss of their space, the life sciences librarians immediately feared a loss of contact with the faculty, staff, and students of

their disciplines. While the life sciences librarians mourned the loss of their home, the physical sciences and engineering librarians faced a loss of space and a loss of control over their environment, further compounding the unhappiness. One issue was the administration's attempt to make the tricky space of the Schulich Library, located in an over 100-year-old heritage building, work with the influx of additional staff, accommodating ten liaison librarians, instead of four, moving people and cubicles to tight and less-than-satisfactory workspaces. Beyond the space concerns, there was also the issue that each library had worked toward a common goal and developed their own sense of being a team. A loss like this can be hard to define and may seem difficult to deal with; however, through open communication, the administration would find librarians more willing to support the change. It is important to allow staff to express their grief without repercussions, and administration should not only allow them to express their grief but also reinforce that they are valuable players in the transition and to the future of the organization (Bridges & Bridges, 2009).

Beneficially, librarians from each milieu recognized that their new colleagues functioned at a high level and provided excellent services to their users. They also felt, however, that the services they provided differed and that the two libraries had significant cultural differences that would complicate their integration. At this point, the library was entering Bridges' second stage, or the Neutral Zone. The Neutral Zone is that hard-to-define time when nobody is certain about anything, there are no clear guidelines, and everyone has different answers or ways of doing things (Bridges & Bridges, 2009). During this transitional phase, organizations must provide support through the chaos of the changing structures and allow people to use the vacuum created by the absence of established customs to invent and innovate new ways of doing things (Bridges & Bridges, 2009). Managing such a change requires a lot of skill and attention. Unfortunately, at the same time, both teams were losing their managers and, hence, facing uncertain direction, which only heightened the anxiety (Bowles & Cooper, 2009; Bridges & Bridges, 2009; Mintzberg, 2011). The director of the Life Sciences Library was leaving the university and the director of the Schulich Library was transferring to a new role. An acting director was assigned the task of managing the first two years of the transition.

As a result of the previously stated upheaval, there is no question that morale was extremely low and it could not be discounted. In *Employee Morale: Driving Performance in Challenging Times*, Bowles and Cooper delve deeply into the importance of morale and the workplace, and they specifically state that if one has a negative view of their psychosocial and physical environment, this will adversely affect morale (2009, p. 5). Among the many reasons to care about employee morale is the unshakeable fact that a workplace with high morale, free of negative behavior and the drama that often accompanies it, is not only easier to manage but also leads to more engaged employees, which in turn results in more satisfied users (Bowles & Cooper, 2009).

After one year, inadequate office space was grudgingly accepted but continued to be a point of dissatisfaction. Despite an undercurrent of malaise, the acting director and the librarians could have moved on to build a shared sense of community and improve morale when a wrench got thrown into the plans. While installing a new roof, a routine inspection of the building revealed that major repairs were needed on the old masonry. As exploratory work on the masonry progressed, staff were relocated from their offices into temporary spaces. Funds for the repairs were not readily available, and to stabilize the building and leave areas open for occasional safety inspections, builders installed temporary walls around the inside of the library building, blocking windows, taking up floor space, and covering many of the windows and some of the nicer architectural features.

To accommodate the temporary walls and reduce the load on each floor, sections of the print collection were quickly sent to storage. The urgency of the situation meant that these collection moves had to happen without taking time to analyze circulation statistics or the overall nature of the collection. Despite the online availability of most current books and journals, including back files, a number of faculty members in certain science and engineering disciplines continued to consult the print collection and were sorely disappointed that their subject area was targeted for no other reason than it was located in the part of the library designated for false interior walls. This caused further distress for many librarians who had to explain a decision they could not control.

Even with a solid, well-tuned team, this much upheaval in such a short period of time would require an enormous amount of gumption and strength to get through. Without a solid cooperative team to begin with, these roadblocks only led to a further decline in morale and stymied any progress made toward integration.

Rebuilding Morale

Two years into the merger, there were still many issues to address and attempt to resolve. So much had happened in so little time, but the worst, for now, was over. One positive element that continued despite the upheaval and low morale was the liaison librarians' desire to provide the best service possible to their users. This is not surprising. A 2012 study by Foster and McMenemy that compared thirty-six international library codes of ethics against Gorman's eight values for librarians found that service was the most commonly shared value when otherwise the codes of ethics showed very little else in common.

Sharing a reference service now meant that librarians from both branches needed to learn enough of each other's disciplines to go beyond the basic level required for informational reference transactions. Within the first few months, they provided training for one another. By working closely together, librarians came to understand that there was no expectation for them to become subject specialists in all the

fields covered by the library. They felt confident that their colleagues would provide support when needed. This reinforced respect for each other's subject expertise and their unique value within the new team.

After two years, the acting director moved on to another role in the library, and the director of the agricultural campus library (the author) accepted the opportunity to fill the role. Interested in the well-being of her colleagues and the integrity of the merged library, the new director could focus on building cohesiveness and a sense of community. How can one move from low to high morale when the change that has caused the perceived poor working conditions cannot be reversed?

The new director was returning to this branch library after six years away, having been a science and engineering liaison librarian for seven years prior to her move to the agricultural campus library. This familiarity with the sciences and engineering, and with many of the faculty and staff, helped ease her transition. Comfortable with the location, and with the physical upheaval somewhat settled, the director set herself a first task to find out more about the current state of mind in the library and what the librarians felt was lacking or misunderstood. At the same time, to her benefit, the previous acting director had provided her with a report summarizing the results of a recent survey of life sciences constituents, combined with an earlier consultation with the librarians and life sciences library users. The latter portion included four recommendations, only one of which, a small service point in the former life sciences space, had been implemented.

For the first couple of weeks, the new director consulted with the librarians individually and as a group. To borrow the idea of a nature analogy from Mintzberg (2011), the new director saw the role of a manager as akin to that of a vine, interweaving itself to give support when necessary and veering away in all directions to weave back and check in (p. 154). She recognized that a manager must communicate, act, and lead (Mintzberg, 2011, p. 89), and that all these must be in a careful balance of not too much of one or the other.

In the interest of improved communication between the liaisons, and despite the overabundance of meetings in academia, as a group, the librarians resoundingly approved the suggestion to meet every two weeks. Without a venue to communicate what needed to get done, the director may have ended up doing all the work and could have subsequently suffered from lack of buy-in and support from the librarians who would likely feel they were not valued. During the previous turmoil, the acting director canceled many meetings when there were no clear items on the agenda. Without an established culture as to how meetings among liaison librarians would function, it would be very unclear to anyone as to what types of items librarians could recommend for the agenda. It follows that the lack of meetings exacerbated misunderstandings. Librarians believed there was value in meeting even without preset items. They needed a venue to bring up any pressing or worrying issues in a formal but open way. At that time, librarians tended to speak mainly to their office mates in their own subject areas and did not benefit from the knowledge

of their colleagues on important choices or have an opportunity to gauge the level of support for an idea that would affect the entire library. Although they all knew that each had particular strengths and interests, this helped them get to know each other's work better and start to identify areas for possible collaboration.

The director wanted librarians to feel that they were trusted to consult on administrative decisions and that their input was valued. There was also an impression that certain issues still needing attention lay fallow nevertheless, due to a lack of discussion and action. A survey by Kwanya and Stilwell indicated that academic librarians overwhelmingly preferred a democratic style of management in which directors recognize the knowledge and competence of all librarians (2018, p. 411). These meetings were a way for the new director to facilitate democratic decision-making. Kwanya and Stilwell (2018) describe how this management style encourages creative approaches to solving problems, dissipating tension and potential disputes among colleagues, and culminating in a greater sense of belonging (pp. 411-412). Without being involved or being given the opportunity to demonstrate their skills and value, Mintzberg's (2011) research cautions that staff, or in this case librarians, are likely to become disinterested and apathetic toward their job responsibilities. They must have the opportunity to demonstrate their skills and knowledge.

Establishing Team Cohesion

The regular meetings immediately bore fruitful results. It was not long before the agenda quickly filled with suggested items. Librarians brought up several lingering areas of concern that were affecting their morale and started to discuss them openly and collegially. Working through issues and making decisions as a group started to create a sense of cohesion among the librarians, which helped to shed the old divisions between the life sciences librarians and the science and engineering librarians. Even practical issues continued to cause anxiety. For instance, service delivery models (single service point with on-call references) had been partially reconciled, but how to manage and schedule service desk hours and absences needed clearer guidelines.

As recommended in the merger report, a small collection of textbooks for short-term loan (reserves) continued to be located at a reduced service desk in the former life sciences library space. One support staff member worked at the desk, and life sciences librarians took turns offering reference support. Though the small service desk remained, there were no longer the comings and goings of an active library in the space. The librarians, whose departments were located closer to the old library, continued to feel disconnected from faculty and students and noted that the space was awkward and ill-used. After two years of little use, administration asked the new director to shut down the small service desk in the old medical library space. It was difficult to justify maintaining a staff presence there while covering vacation time,

sick days, lunch hours, etc. The reserve collection was moved into the medical history library that had been adjacent to the former life sciences library and remained in the medical building.

While this decision was out of the liaison librarians' hands, the director sought their advice and ideas on what would make them feel comfortable with the further loss of space. In an attempt to bridge the lack of contact, librarians requested an office space in the medical history library. Negotiation with library administration and the director of the medical history library went smoothly, and an office was furnished with the necessary equipment. Although librarians decided to discontinue the service after a one-year trial, in terms of management, the project was a success. Librarians had been listened to and their recommendation followed. Too often, the management buzzword is about "hearing" what people are saying. "Being heard" communicates that your words are taken in but not necessarily that you will be supported. In an effort to foster staff buy-in, whenever possible, one should not only listen but also consider requests and, unless completely unreasonable, meet them. Further, by implementing the service desk, administration displayed a willingness not only to listen to the librarians but also to allow them some space to fail. The long-lasting result is that librarians confidently make recommendations for improvement. In fact, some are talking about reviving the service, and they promise to try more extensive and focused advertising efforts.

In order to bond groups, managers must address and resolve any conflicts that prevent them from moving on with their work (Mintzberg, 2011, p. 67). One such conflict involved evening reference hours, which are seemingly straightforward but became a point of tension. Prior to the merger, in both locations, reference services were available in the evening. Most librarians resented being onsite for the rare user and having to serve as backup to empty and secure the building at closing time. The director looked at the previous year's statistics from September to May, and during that entire time span, there had been nineteen reference questions answered by librarians between 5:00 p.m. and 7:00 p.m. A minority argued for the validity of keeping evening reference on the philosophical basis that the less they offered reference hours, the less students were likely to come for help. They also argued that it was a librarians' primary responsibility to help and that if only one student a week showed up, somebody should be there.

Though the director sympathized and agreed to a certain extent with the philosophical reasoning, the evidence supported the argument to discontinue evening reference hours. Bolstering the decision was the fact that on weekdays, liaison librarians are all over campus with committee work, teaching, and meetings, and having them spread over the evening made some busier daytime hours difficult to cover. Sometimes it is true that numbers cannot tell a whole story, but in the interest of satisfying the majority of librarians, and based on both the evidence and the general consensus, the director decided to discontinue evening reference hours with the promise to re-examine the decision in the event of user complaints. Most librarians

were immediately pleased with the decision. It had been most valuable to openly discuss this topic in librarians' meetings, where opposing viewpoints could be heard and debated. In the end, even those who had not agreed could feel some satisfaction at having participated in the decision. They recognized that they were the minority opinion and accepted the decision in the interest of harmony.

Seeing decisions made with evidence, input, and consensus is a means to encourage trust and build stable relationships. The librarians started to feel more comfortable with each other, and meetings became a place to exchange ideas openly, seek feedback, and communicate information. Within months, the tension of uncertainty started to loosen. Librarians started to more frequently compliment and openly appreciate each other's contributions.

There remained two report recommendations to address, each of which could contribute to a stronger shared identity. The first of these recommendations was renaming the library to include the life sciences. Acknowledging the presence of life sciences in the name could help improve the life sciences librarians' sense of belonging. It would also signal to the physical sciences and engineering constituents that the life sciences are an important part of the library. It was clear after two years that some library users did not know where to look for support in the life sciences because of the lack of clarity in the names. For example, some users contacted the medical history library looking for support. To combat the loss of identity and signal to all that the new merged library firmly represented the life sciences, simple formal steps were also put in place for the approval of a name change. This improved the sense of a shared identity as one unit and presented a unified image of the new library.

The final recommendation implemented from the report was the establishment of a single library advisory committee. Two years into the merger, many within the university were still surprised to learn that there was no longer a branch located in the medical building, or they believed that service provision had merged into the medical history library. With the support of the committee chair and the deans of the libraries and of the faculty of medicine, a single advisory committee met for the first time in 2017 and since then has proved to be a success. Faculty members hear each other's specific concerns on matters relating to collections, services, and user needs, and also their commonalities, which helped strengthen not only their ties to the library but also to each other. In recognition of subject relevance and expertise, one librarian from the sciences and engineering and one representing the life sciences serve on this joint library advisory committee.

Renewed Energy

With conflicts resolved, and as the liaison librarians' shared identity grew, ideas flourished and the library entered the third transitional stage, New Beginnings, where the change is accepted, a new identity is formed, and wins are celebrated

(Bridges & Bridges, 2009). Typical of this stage, with increased energy, librarians were able to turn to areas of functional interest that could benefit the entire library.

McGill University Library continues to evolve with a liaison librarian model across all branches and integrates some functional specialists who offer direct support to users and provide training to liaisons. According to a 2016 study in the United Kingdom, subject librarians, or liaison librarians, remain the preferred model in academic libraries (Hoodless & Pinfield, 2016). Hoodless and Pinfield (2016) provide a clear summary for the preference, as reported by library directors, but also examine the advantages and disadvantages of the various models. These functional areas, or research support services, such as bibliometrics, research data management, digital preservation and curation, and scholarly communication, are becoming more visible but at a slower pace than predicted (Raju, Raju, & Johnson, 2016, p. 167). Despite the presence of specialist librarians, liaison librarians are encouraged to delve deeper into functional areas that may relate more specifically to their subjects or may pertain to all library users. This is reinforced by the central library administration's commitment to fund continuing education when needed.

At McGill, the scholarly communications librarian and the copyright librarian are currently the most well-established roles. They offer workshops, training, and support to liaison librarians. They also provide support to users, either through direct contact or on referral from the liaison librarian. As the most established functional areas, training received from both the scholarly communications librarian and the copyright librarian has helped develop liaison librarians' knowledge and confidence in these subject areas. As a result, many liaison librarians now offer information sessions to their departmental units or incorporate these new areas of expertise into their teaching.

In the life sciences, the continued growth of evidence-based medicine has made expertise in knowledge synthesis a necessity (Delaney & Bates, 2015, p. 33). The strong recommendation, if not requirement, that a librarian is either part of the team or consulted when conducting a review has increased pressure on academic librarians. This is both in the time spent assisting faculty and on training students. Unfortunately, increased requests for this service coincided with the general upheaval of the merger. With the main points of contention settled, the life sciences librarians had the time and energy to compare their experiences in supporting knowledge synthesis. They realized that without clear guidelines, a lot of time was wasted and efforts duplicated. Some of the impetus came from the need to rationalize their services and some came from the desire to explain to central library administration the role of librarians in the knowledge synthesis process. Two of the librarians coordinated the effort to gather all their expertise and applied these to successful and tangible outcomes. Several guides for the use of all librarians, faculty, and students have saved time and provide much-needed guidance on the knowledge syntheses process (see https://libraryguides.mcgill.ca/knowledge-syntheses). Since then, one

librarian in particular has taken on the role of maintaining and updating the guides and coordinating further efforts.

One of the most recent hires arrived with expertise in providing research data management support. This is the least developed area of support in the library system, and although there is an interest in hiring a data management librarian, it has not yet been done. Instead, an emphasis was placed on hiring a data librarian who could help researchers and students find data. This echoes Tenopir, Sandusky, Allard, and Birch's (2014) conclusion that most libraries have a research data-finding service, which is really an extension of reference, while a smaller number are involved with assisting in the preparation of data management plans (p. 89). At the time of writing, this recent hire only offers support for data management to research groups in her subject areas, but as she settles in and training increases for other librarians, it will be interesting to have her share her expertise in this area. As these new responsibilities grow, there will continue to be a need to assess and possibly rationalize services so that librarians can continue to do their work well and have a manageable workload.

Managing Staffing Changes

With eleven librarians and several large faculties, there are many elements to consider and manage in terms of service to departments when dealing with leaves. Librarians at McGill are eligible for one-year sabbaticals after obtaining tenure, and recently a disproportionately high number of librarians received tenure within a couple of years of each other. This created a seemingly never-ending cycle of sabbatical leaves, which was also compounded by unpredictable compassionate leaves, short-term disability, maternity leaves, and departures. This situation created overlapping and successive subject areas to cover and has proved to be—and continues to be—a trying area to resolve. Coverage has seen many iterations, again, with the feedback of the librarians always taken into consideration.

Initially, librarians covered for their missing colleagues by supporting extra subject areas; however, this was not sustainable. It also added an extra level of confusion for faculty and staff when that one temporary liaison subsequently left a subject area open and a third person was then assigned. On the heels of some chaotic years, some faculty members and students felt they were being shuffled around and grew impatient. Additionally, some librarians shouldered more work depending on the subject area.

The dean of the libraries, recognizing the imbalance created by a growing number of sabbaticals and in consultation with the branch library directors, created two floating contract positions. The gaps were such at the merged library that one contract librarian position spent their entire two years trying to make up for the gaps in sciences, engineering, and medicine. One of the great benefits of liaison librarianship as a service model is the deep subject knowledge the librarian gains, but this takes time to develop.

Librarians also get to know their faculty and staff well and often integrate into the workflow of their departments. A disadvantage of this high level of service is that, administratively, these librarians are not easily replaceable for temporary leaves.

The nature of the contract position meant that a relatively inexperienced librarian had the difficult task of fitting into a new culture while also learning the discipline(s). The experienced librarians were happy to assist, but this meant that they were spending hours assisting with reference questions, filling in on advanced consults, and advising on subject matter in terms of teaching content. It is a stressful position for a new librarian to be in, even if they possess subject expertise in one of the areas. In the space of two years, the contractual librarian covered vastly different subject areas with very different departmental cultures. In an environment with a large central library system, this may be a viable position, where the contractual librarian can shoulder the burden of general reference and library workshops, but in a library system with subject-specific branches, this is more difficult to accommodate.

In the end, library leadership decided that it might be better to redistribute the subject areas and create a new tenure-track position, rather than continue with the contract position. This was done with the understanding that the liaison librarians would carry on the work of missing colleagues. This kind of decision requires buy-in from all librarians and, thanks to the administration's precedent-setting agreement to try a contract position, the librarians were now not only willing but also suggesting how they could cover leaves.

At first, the library went back to reassigning departments to liaison librarians. This once again proved inequitable, and the library staff, faculty, and students were again confused regarding who was covering what. Naturally, the librarians on the now well-bonded team tried to alleviate their overburdened colleagues and began to split up teaching and consults, but the library needed a simpler plan. Rather than assign an individual librarian to a department, the liaisons agreed to replace the individual liaison's name with life sciences librarians or physical sciences and engineering librarians. From then on, any request that came in from a department for which the person was on leave, whoever was on call or checking email would triage it. Responses are quick, and requests requiring detailed follow-up or significant work are assigned according to a previously agreed-to distribution of tasks.

Consensus regarding this method and a close, well-functioning team are paramount for this to work. Without willing participation, the system would fail. Further tweaking eventually led to eliminating the division between life sciences librarians and physical sciences and engineering librarians by simply replacing the individual's name with "library name" librarians. In our experience, using this team-based method, services functioned smoothly with as little disruption to the liaison areas as possible and without overburdening one group or librarian.

The "New Beginning" stage also allowed the director to put more thought into rationalizing departments, traditionally kept separate because of their physical locations. The departure of a life sciences librarian, the end of the temporary contract,

and the transfer of a physical sciences librarian opened up three positions and the opportunity for some subject shuffling. The single life sciences librarian position that was overburdened and unable to meet demand was divided in two, with one librarian for undergraduate medicine and another for post-graduate. This was also an opportunity to create the first liaison position spanning all disciplines by assigning her biomedical engineering from the Faculty of Medicine along with bioengineering from the Faculty of Engineering.

We are in the first year-and-a-half of experimenting with how to cover these workflows, and with various unexpected events and permutations of disciplines needing coverage, as well as various types of leaves, modifications will likely have to be made again.

Conclusion

Five years after the merger, one can confidently say that there is now one cohesive team at the Schulich Library of Physical Sciences, Life Sciences, and Engineering, sharing a strong sense of community focused on supporting faculty, staff, and students. The hastiness of the merger combined with little communication upset many of the people involved and led the administration to focus on practical aspects of the move, while arguably failing to fully address the emotional impact it was having on the liaison librarians. Additional disruptive events in an already confusing time failed to help ease the transition. New management, also trying to adjust to and learn about a new environment was not able to disambiguate the confusing territory of unknowns that further affected the morale of the librarians.

Increased opportunities for communication through regular meetings helped librarians learn more about their colleagues' work. Meetings were not simply a vehicle for top-down information passing but truly a more open venue for discussing needs and how to best fulfill them in this new environment. While not always in agreement, the librarians were able to have their opinions taken into consideration and were more likely to accept decisions once they saw others were on board. As months passed, a new sense of identity formed, energy increased, and new ideas emerged.

Although librarians receive a performance evaluation on a yearly basis and these serve to tell a story of increased collaboration and support, the overall effectiveness and efficiency of library services have not been equally evaluated. While anecdotally all is well, the next step should be to introduce continuous evaluation, not only for improvement but also for celebrating and sharing a successful integration.

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