

Thinking about a joint-use library?

A Memorandum of Agreement and timetable can ensure success

by Kathleen Schwanz

Providing quality library service points at a reasonable cost continues to make joint-use libraries an attractive option. To thrive in today's marketplace, many types of academic institutions, including multicampus and single-campus universities, community colleges and schools, have opted to join forces with each other and even with hospitals, governmental installations, and corporations to provide better or more convenient facilities for their customers. The spirit of the resulting joint-use libraries, of course, is unique and influenced by many variables, including the participating institutions involved and the community served.

Whether the result of extensive planning, surveys, and assessments of specific service areas or of something innocuous like an informal brainstorming session by individuals from different institutions, a cooperative venture can be brought into being. Improved service and actual evidence of value to each participating institution should be the sought-after goals. The impetus for the arrangement should motivate and serve as the guiding force in building a strong alliance among the participants.

A mutual objective, complementary needs, shared risks, and trust building are all key elements of a successful partnership.¹ If the stimuli for cooperation are one-sided or if benefits accrue to individuals rather than or-

ganizations, a cooperative venture should not be pursued.²

Planning for a cooperative undertaking should begin with an overarching vision but the operational process must be factored into the plan, as well. To accomplish the big picture goals, those expected to implement the plan should be participants in the planning process.³ Because so many factors affect the outcome of an alliance, inclusivity in the process rather than exclusivity should be sought. Oft times, it is the little things that sink or sabotage a relationship. They are important enough that they should not be an afterthought.

Ensuring the success of any joint-library venture requires careful planning by all the institutions involved and thoughtful implementation. In administering all aspects of the venture, no one institution should be in a situation of assuming something should happen or that something should be one particular institution's role; a good rule of thumb, especially for a joint-use library, is clarity in all things.

Two written documents are recommended to provide requisite structure for a project. The first is a written Memorandum of Agreement (MOA) to remind participants of their joint-venture agreement. The second document is a timetable of the planning and implementation phases to move the project along

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in an agreed-upon fashion without any of the participants feeling pressured or hurried.

The details surrounding joint-use libraries are as unique as the libraries themselves. To aid individuals considering a joint-use library venture, points to cover in a MOA (MOA rhymes with boa) will be detailed in the remaining paragraphs. Timetables of the planning and implementation phases will be left to the readers' discretion. At the end of the article, some selected implementation and evaluation issues will be explored.

Creating an MOA

All parties should come together to create an MOA. It should begin with a general agreement regarding the scale of the joint-use library and the services to be provided.

Budget. The MOA should delineate how the venture's annual budget is to be constructed. Should each institution be billed to make a common joint-library budget, should all line-items remain with the originating institutions, or should some combination of the two be used?

Typically, a good document would include the following costs—each item broken down by percentage being shared by each institutional party:

1. identification of ongoing costs such as staff, goods and services, initial acquisition of materials, equipment and travel;
2. start-up costs for computing equipment and related telecommunications;
3. start-up costs for furniture, shelving, area dividers, and any additional equipment; and,
4. space costs by projection of needed space for library collections, growth, and ample study space.

Depending on the type of institution involved, percentages of costs could be based on enrollment, clients served, or services rendered. During this phase of planning, a discussion of grant sources or fundraising alternatives to purchase needed items could be conducted.

Management and organization. Additionally, the MOA should delineate the joint-use library's management and organizational structure. Should institutions that contribute more heavily dictate what the joint-use library's management should be or should each party be an equal partner?

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Although a joint-use library's management and organizational structure may seem very straightforward, differing organizational missions and climate in the parent institutions may lead to differing expectations at the planning table. Avoid surprises by exploring institutional differences ahead of time; exercise clarity by careful planning.

Policies and procedures. During the planning of the MOA, major policies and procedures for the joint-use library should be decided, including those for circulation, collection development, acquisition, cataloging and processing, interlibrary loan, document delivery, and reference services. Although it would seem this planning would take the flavor of "how something is accomplished" or a "who does what" among institutions, the clientele served and service quality should not be neglected. Who are the joint-library's potential users and how shall they be treated? Are there other potential unaffiliated groups and what provisions need to be made for them? Fee-based and other services to the greater community need to be considered.

Location. The last factor, the location of the joint-use facility, is a major consideration that can be comparatively easy to decide (very few places in the community offer enough square footage at a good price) or a major stumbling block (the inner city versus the suburbs). Because it could determine whether the project moves forward, the discussion about where to locate shouldn't be left until the end.

Implementation: putting the agreement to work

As noted above, a written timetable of the planning and implementation phases enables all participants to realize their joint expectations. Such documents inspire trust. Robert Frost's famous words, "Good fences make good neighbors," are never truer than

on the subject of joint-venture libraries. When participants do not follow through with their agreed-upon points on time, problems arise.

Partnerships are far less untidy in the abstract than in real life. What makes this so is the addition of people and their ways of behaving and doing things. They create the environment in which the partnership will thrive or not—whether congenial or hostile. Those who work the front lines of a joint venture need to feel secure in their own positions; they must trust one another; and, in the best of circumstances, they should believe in the legitimacy of the union.

Although difficult to generalize in ventures as unique as joint-use libraries, conflicts borne of institutional differences are bound to arise, whether the library opens with brand new employees or chooses seasoned veterans from each institution. For individuals planning joint libraries, the stress of bringing an inexperienced, opening-day staff up to speed must be weighed against putting together a seasoned staff of would-be adversaries from each institution ready to call home with any perceived problem or infraction. For these reasons, a mixture of very new employees and veterans works best. Whatever the method used, strategies to handle the common conflicts that arise should be resolved ahead of time.

Even in the best implementations, differences in mission and organizational culture can sometimes threaten the fledgling library and affect service quality. Examples include differing institutional attitudes concerning procedures (insisting upon a rigid workflow vs. encouraging employee latitude), how business is conducted (conducting face-to-face service transactions vs. doing business through e-mail and the Web), and training opportunities available (taking care of business vs. promoting employee lifelong learning). Again, frank discussions of dormant problems by all the parties involved are absolutely necessary. Such discussions form the basis of the mission and organizational culture of the evolving joint-use library.

Partnership: fait accompli

Organizations need to ask themselves what outcomes they hope to achieve by combining operations. These questions must be answered candidly with acceptance of good and

bad scenarios playing out. Based on what develops from questions, answers, and what the planning group decides it can live with, a cooperative facility is born or not.

If the decision is made to proceed with a joint-use facility, all that hard work that was realized will continue to be used because the MOA is a living document. It will change as the new library evolves and it becomes clear that many pre-partnership assumptions do not pan out while several unanticipated ones do. Once the joint-use library is in service, the evaluation process will begin and how well this new partnership was implemented and operates will be assessed. Results of the evaluation will (or should) cause the partners to begin tweaking problem areas. Problem areas can be things such as services, processes, and personnel. Essentially, the evaluation and fine-tuning cycle should occur throughout the life of the partnership to ensure success of the venture.

Notes

1. Harvey Meyer, "My Enemy, My Friend," *Journal of Business Strategy*, 19 (1998): 42–46.

2. Richard M. Cyert and Paul S. Goodman, "Creating Effective University-Industry Alliances: An Organizational Learning Perspective," *Organizational Dynamics* 25 (1997): 45–57.

3. Maxine Marks Teitler, "Alliances Are Not Mergers: What Problems Should You Expect?" *Nonprofit World*, 17 (1999): 51–53. ■

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