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The University of Houston's Liaison Services Advisory Board

A case study in leadership development and succession planning

Started in 2013, the Liaison Services Advisory Board, originally called the Liaison Services Leadership Team, is part of the University of Houston Libraries' Liaison Services Department. The advisory board, consisting of department heads and coordinators, grew out of a desire to foster leadership development within the department and develop succession planning strategies.

The Liaison Services Department has benefited considerably from growth and changed markedly since 2011, after adopting an integrated, co-management structure. Prior to 2011, the department consisted of ten liaisons, supervised by one department head, with collaboration from two functional heads in the areas of collections and instruction.

In response to changing needs and the opportunity to add new positions, we developed a co-management structure that allowed the department to grow to 21 employees consisting of two co-department heads, several coordinators, and a combination of subject liaisons and functional specialists. The growth and current organizational structure contributed significantly to the development of the advisory board.

Creation

As the department grew in size and complexity, leading us as department heads to consider the creation of a leadership team,

we had to address the basic questions of the composition of the team and its role in the department. After initial consideration and discussions, we decided to take advantage of an underused feature of our organizational structure and define membership as the department heads and coordinators. At that time, there were four coordinators: the coordinator of undergraduate instruction and outreach, coordinator of research support services, collections and online resources coordinator, and science team coordinator. Within Liaison Services, each of the coordinator positions has distinct roles, usually related to functional specialties, and, prior to the establishment of the advisory board, we had no consistent expectations of them as departmental leaders.

As we began discussing goals for the team, we sought to give the coordinators an opportunity to actively develop leadership skills. We centered activities and structure around four projects, giving each coordinator an opportunity to lead an initiative. We introduced the original concept of the "leadership team" and the structure around the four projects to the entire Liaison Services Department.

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The discussion focused on the purpose of the team and the opportunities all members of the department would have to participate on the projects.

The inaugural year

At its inception, the goal of the leadership team was to provide a project management and mentoring structure for the four coordinators, while also introducing them to some of the management and leadership issues of the department. The coordinators helped develop the four projects, and all of the liaisons were required to work on one of the projects. Project teams were established based on interest and expertise.

The leadership team acted as the decision-making body for the structure and scope of the projects, and the coordinators took responsibility for developing charges for their projects and communicating their project goals and expectations to their team members. The leadership team served as a sounding board and mentored the coordinators through many of the decision-making processes and challenges they encountered in managing their projects and teams. As work on the projects progressed, many leadership and management issues arose organically, leading to conversations about delegating tasks, working with strengths and weaknesses, project scope, onboarding new members, and celebrating successes.

The team also served as an accountability structure for assessing the progress and outcomes of the projects. The coordinators provided regular project updates to the entire department at departmental meetings throughout the year. In this capacity, they received significant experience in leading and driving the department in new directions. The structure of the leadership team provided mentoring and established an expectation among the liaisons that the coordinators are a part of the leadership structure of the department moving forward.

As the first year progressed and the coordinators established their credibility as leaders in the department, we began involving them

more widely in leading the department. For example, we asked each of the coordinators to plan and facilitate one of our departmental meetings on a topic related to an area of expertise. They also planned several departmental team-building activities. This involvement led to additional discussions and desires to establish more formalized conversations and roles for the leadership team.

Year two

The leadership team conducted a plus-delta exercise to determine strategies for improvement in year two. There was interest from the coordinators to learn more about strategic planning and actively participate in leading the departmental strategic planning process. There was also interest in devoting meeting time to specific leadership topics that we had not addressed in year one. Finally, there was a desire to serve as a mentoring body to other aspiring project leaders within the department.

We structured biweekly meetings so that one meeting a month served as a special topics meeting. With this change, we hoped to provide a formalized peer-mentoring forum to prepare the coordinators for future leadership experiences. We brainstormed leadership topics and made a list to refer to throughout the year, with the intention of finding readings to aid reflection and discussions. The other meeting remained focused on project discussions.

We also brought the departmental strategic planning process under the purview of the team, making it the body in charge of the annual strategic planning process, and delegated parts of the process to the coordinators. With the expressed interest to mentor other aspiring leaders in the department, apart from those on the leadership team, the team decided that the 2014–15 projects should be led by others in the department.

The other major focus of the team in year two was to lead a third departmental project, to define and benchmark our services and departmental expertise for long-range planning. The project itself was an exercise in succes-

sion planning and has served as an excellent focal point for introducing the coordinators to this topic. The team defined the department's core services, developed a rubric with service level indicators, and proposed proficiency levels needed to effectively provide those services. From there we identified gaps in our ability to provide services, areas of service strength and departmental expertise, potential priorities for future hiring, and opportunities for additional training.

Challenges and successes

Like any new initiative, the leadership team experienced both challenges and successes. The group mentoring approach has helped ensure that the team has learned from failure and celebrated achievements, and by working through both, we have helped develop leaders within our department to step into new roles and responsibilities and prepared the department for changes in personnel and services.

Among the most difficult aspects of establishing this type of team was clearly articulating its role within the department. Since its creation was inspired by several factors, and it began as an experiment, we wanted to leave open possibilities for it to evolve. The lack of a strong definition of the role of the team prompted legitimate questions in year two about how it fit into the structure of the department and what authority membership on the team granted to the coordinators.

As the department heads addressed these issues, the team evolved into an advisory body for the department heads and a learning community for coordinators. We recognize that we failed to communicate clearly and convincingly about what the team was and was not, and this likely made the team less successful in serving as a mentoring body for the work of department. It was at this point that we decided to rename the team the Liaison Services Advisory Board and definitively establish its purpose and role within the department.

Fortunately, the board also enjoyed some wonderful successes, and the members have

gained important experience and professional growth through their participation in it. The high level of trust within the group and the willingness of each member to share new ideas and provide thoughtful, constructive feedback has created a lively and productive peer-mentoring environment. As department heads, we are confident it has led to more effective strategic planning and a stronger vision for the department. It has also continued to solidify the cohesion among the functional areas of the department, which was a priority of our co-management structure and will help in succession planning as a whole.

As it turns out, the individual leadership development that participation in the board offered worked better than we anticipated, as two of the original members advanced into higher positions. Through their work on the board, especially their leadership of departmental projects, they learned important leadership skills they could take with them. As we revised the descriptions for the coordinator positions they left, we have been heartened to realize how much progress our department has made in their areas of expertise and have gained a deeper appreciation for the mentoring we have all given and received from one another. In addition, we have also seen how the board has helped clarify and elevate the role of coordinators. We have recently used the title of coordinator and role of the board to elevate other aspiring leaders to coordinator roles and laid a foundation for continued departmental growth.

A current and future challenge for the advisory board will be how we bring new members into the group. The dynamic among the original members evolved organically, as we came to know each other better and trust each other's judgment. As a group, we have a fast-paced, frank, and occasionally contentious conversational style that could potentially intimidate or alienate newcomers, and we will need to take the time to carefully plan the integration of new members of the board. This may require us to engage in activities such as creating mutually agreed upon norms for meetings and documented expectations

for the members that can be communicated outwardly to the department. If the board can continue to function effectively after onboarding new members, we will have evidence that it can help the department manage staffing changes at the coordinator level.

Developing a leadership structure at your library

If you see among your colleagues a strong interest in learning about leadership and believe

your department or unit could benefit from closer attention to leadership activities like succession planning, the leadership team approach may work well. Based on our experience with the advisory board, we are strong proponents

of this group mentoring approach to leadership development, strategic planning, and meeting organizational goals. Even if your library context differs significantly from ours, we believe elements of this model are broadly applicable across a variety of organizational structures and cultures.

Clearly, the process of forming an internal leadership team in a department of 21 differs from doing so in a smaller department. Nonetheless, even a department of ten to twelve people could benefit from having a subset of its members intentionally focused on leadership work. A library could also implement a similar model at a different level of the organization. For example, an associate dean could develop a group mentoring approach to foster leadership development among his or her department heads. And although we began our team with members who shared the coordinator title, a department or other unit with a flatter organizational structure could create a structure based on interest or job responsibilities, and it could be fluid over time.

We also recommend structuring the work of such a team around projects. As we have described, our approach used projects in two ways: once by having individual team members take responsibility for leading specific projects within the department and once by working on a single project together. Leading and collaborating on projects provide a wealth of concrete examples of leadership challenges, which the team can then work through as a group by mentoring one another

and engaging with the relevant literature in the profession. Such projects spread knowledge and skills more broadly and systematically throughout a department or unit and present team members with a more varied set of leadership challenges than they would encounter working in-

dependently, as well as a close group of colleagues to support and encourage them.

Conclusion

When we created the Liaison Services Advisory Board, we were optimistic about its potential for helping us effectively manage a department growing rapidly in size and complexity and for supporting practical leadership development among our coordinators. As the board coalesced around departmental projects and shared interests, we were encouraged to see its members gain knowledge and confidence as leaders in the department, the library, and the profession. We also saw new opportunities for the team not only to discuss topics, such as strategic planning and succession planning but also to engage in those activities as a group. As department heads, we have found in the advisory board the chance to mentor current and future leaders, to gain a fuller understanding of the opportunities and challenges that have arisen in the work of Liaison Services, and to collaborate with committed, engaged colleagues to become more responsive and nimble in the face of change. //

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