or

REORGANIZATION IS THE ANSWER, BUT WHAT WAS THE QUESTION?

INTRODUCTION

It is only fairly recently that librarians have begun looking at innovative ways to organize their institutions, in order to accomplish their objectives, based on theoretical principles, rather than on expediency. The structure of medium-sized academic libraries has resulted from ad hoc adaptations to existing conditions. The way the pieces are arranged and relate to each other have developed from past practice, and have adapted to staffing changes, although in most cases an overall similarity of concept is apparent.

The purpose of this paper is to examine the organization of one medium-sized Canadian University library, namely the Leddy Library, University of Windsor, in order to determine to what extent general principles of organization have been adopted and implemented, and to what extent this enhances or hinders the effectiveness of the Library in carrying out its mandate.

The Leddy Library of the University of Windsor has grappled for many years with the issue of an appropriate structure in order to meet its stated aims and objectives. These attempts have been driven by the exigencies of the moment, and the interest and

commitment of the Library administration, and of individual librarians. Changes in the structure have been made from time to time with greater or lesser degrees of success, and the motivating force has usually been as a result of attempts to keep up with shrinking resources, and to adapt to technological change. The Library is on the verge of another attempt to review the problem, and it has been generally agreed that the first step should be the development of a strategic plan. If everyone has a clearer idea of what lies ahead for the Library during the next ten years or so, then it will be more likely that an appropriate organizational structure will be forthcoming. The University Librarian recently took the initiative by announcing at a meeting of the University Library Administrative Committee:

that she will be setting up a Strategic Planning Committee as a priority project for the library. This may involve bringing in a facilitator from outside. ¹

SCOPE

Because of the very limited amount of time available, it was initially decided to limit this paper strictly to a descriptive overview of the organization and decision-making mechanism of the Leddy Library, and to relate this to the stated objectives, in order to determine the extent to which the Library has an effective organizational structure. As part of this study it was felt that a review of the literature on the subject, and an historical

overview of organizational development in the Library would be appropriate.

It very soon became apparent that there was a huge amount of material available in the literature which was of considerable relevance, Any attempt to study organizational theory as it applies to academic libraries, or to make use of the ideas and the research findings that had been assembled, should not be carried out in a perfunctory manner. Therefore, it was decided to select a number of papers and monographs for a brief general description. These all displayed significant theoretical insights, and yet could provide practical assistance with respect to the analysis of particular library structures.

A brief review of the historical development of the structure of the Leddy Library was also considered to be appropriate. However, as a result of a review of published reports, internal documents, interviews with administrators and staff members, and personal knowledge, a consistent pattern emerged that had implications for the present state of the Library, and for future development. There was so much material available, that a detailed analysis was not possible at this time.

However, as a result of the literature survey and the historical overview, it is felt that the groundwork has been laid for a continuation of a study that will hopefully eventually result in an improved structure for the library, which will then be able

to meet its stated objectives in a more effective manner.

LITERATURE SURVEY

Forty-five years ago, R.F.M. Immelman outlined some of the basic principles of organization, which still hold true today. He defined an organization as

the form of every human association for the attainment of a common purpose.²

He went on to describe the components of an organization, namely specialization, co-ordination, facilitation, integration and delegation. He reviewed the principles as they related to the division of labour, work analysis, departmentalization and the purpose of organization charts. He also pointed out the relevance of Gulick's so-called "POSDCRB" theory of Planning, Organizing, Staffing, Directing, Co-ordinating, Reporting and Budgeting, to the management of libraries.

These same principles of organization as applied to libraries were repeated and expanded upon in the standard text on the administration of university libraries, by Louis Round Wilson and Maurice F. Tauber, which is taught extensively in North American library schools, and used as a standard reference tool by most academic library administrators.

David H. Lewis developed a model of organizational structure based on the work of a number of organizational theorists. He commented that

The important truth about academic libraries is that they are encumbered by record systems and by financial and organizational structures, which discourage innovation and make it difficult for them to manage uncertainty ... academic libraries have been, and still are, inertial institutions ... Most are ... machine bureaucracies. In general, these organizations have allowed for consistency and control and for considerable job specialization. They are suited to an environment where coordination depends, as it does with libraries' complex record structures, on standardization of work. 11

Lewis believed that this simplistic approach to library organization was changing, as libraries were changing. He mentioned, for example, the purchase in machine-readable format of bibliogaphic data, as an alternative to laborious in-house production. 12

He went on to discuss in some detail the theories of Mitzberg with respect to the strategic apex, the operating core, middle management, the technostructure and the support staff, as well as distinguishing between Mitzberg's concepts of simple structure, machine and professional bureaurocacies, and adhocracies. He also reviewed the theories of Ouchi, Galbraith and Becker and Neuhauser. 14

He then compared some of the problems inherent in the management of academic libraries, such as the importance of innovation, organizational control mechanisms, the confrontation of uncertainty, the visibility of consequences, with the theoretical insights derived from the literature on the subject. From this he developed an organizational paradigm which addressed such issues

The use of a modified professional bureaucratic configuration as a model for organizational structure; the creation of flexible resource allocation mechanisms; the use of management information systems to measure performance; the reduction of the production functions performed within the organization; the creation and articulation of a well-developed, detailed organizational philosophy. 16

Lewis's paper should be required reading for anyone proposing to review or evaluate the organization of an academic library, in order to develop a more effective structure, because it rejects the "do the best you can" philosophy of management, in favour of giving librarians the encouragement and tools they need in order to use their professional judgment.¹⁷

Herbert S. White addressed the issue of an effective managerial environment in libraries, in which being consulted is viewed by staff as being of greater importance than participation in the decision-making process. He noted:

Libraries, to a greater extent than other political units, wmbrace or allow themselves to be coerced into objectives for which there are no resources, no plan and no hope of success ... nobody likes to lose all the time, and if library workers perceive that they never had a chance in the first place, they will quite understandably quit caring and trying. 18

Irene B. Hoadley and John Corbin drew attention to the pressures to which libraries are subjected, as they enter the ninth decade of this century:

the information explosion; the shifting societal emphasis to information as a commodity; the rising cost of

materials, labor and equipment; declining library revenues; advances in automation and technology; and competition from other information-disseminating organizations. 19

Various suggestions have been put forward for addressing the problems created by these pressures, including the redesign of the organizational structure, taking into consideration increased flexibility, a matrix organization, rearrangement of the functions or minor shifting of responsibilities.²⁰ The authors proposed a more responsive form of organization that thet believe could be adapted to the needs of most libraries, but they concluded:

The model proposed here is little more than a reshuffling of functions, but some of the changes are significant, such as the separation of interpretation and use ... Librarians tend not to be risk-takers, which means that they prefer to look up at the beanstalk rather than try to scale it to see what may be in those upper reaches.²¹

B.J. Busch conducted a survey on the manner in which six large libraries had integrated their public and technical services functions, and concluded that decisions to reorganize were brought about by

Automation and the expectation of future systems \dots economic factors \dots new staff in key positions \cdot 22

Two vital elements that contributed to the development and implementation of a successful reorganization structure, were

leadership at the top and staff participation \dots decisions to alter the status quo were made by the chief. 23

A number of reports are available on the procedures adopted by

various libraries to reorganize their structures. One of the most comprehensive and well-thought-out projects was undertaken at the Paley Library, Temple University, Philadelphia.²⁴ The terms of reference stated

The Task Force was to look at the current organizational structure in the light of technological, financial, curricular, enrollment and library service considerations, as well as such organizational concerns as work flow, appropriate staffing and reporting relationships.²⁵

A report was issued which covered work processes, the historical context, a statement of missions and goals, a description of the present library structure, the development of an improved organization, and an implementation plan.

A useful text for any library embarking on a reorganization project of this nature is Edward R. Johnson and Stuart H. Mann's work on organizatioanl development for academic libraries. Its main purpose was to evaluate the Management Review and Analysis Program of the Association of Research Libraries, but it provided a useful historical introduction to organizational development in libraries, and a theoretical and practical approach to planning, organization development and evaluation research, particularly with respect to self-assessment.

Another very useful and recent work by Peggy Johnson discusses in some detail the major development affecting organizational structure in libraries at the present time, namely automation.²⁷

The Office of Management Services, Association of Research Libraries, periodically issues specification kits on various topics of interest to library managers, which consist of a compilation of documents compiled by various members of the Association. One which is of particular interest, presents the organization charts of a number of large libraries, such as the Universities of Alberta, Michigan, Rochester, Toronto, Utah and Western Ontario.²⁸ Recent trends in organizational development were summarized in the introduction:

Responding to the requirements of the information age, some research library organizations moved during the 1980s from an archival model to an access model. Internally, library organizations, traditionally departmentalized by function, continued to experiment with a matrix organization structure. There was also more evidence of vertigal integration, organizing traditional functions sectored by subject areas, much as businesses organize around product lines.²⁹

Significant recent changes with respect to the renaming of traditional functions as a result of automation, the prevalence of participative committees and work groups, and the appearance of micrococomputers as a vital management tool, were also noted.³⁰

Also related to the development of more effective organizational structures was a specification kit which collected together the strategic plans of a number of libraries, including the University of Michigan, the Library of Congress and Ohio State University. Although the libraries included are major research institutions, the general principles used in the compilation of the

strategic plans have specific application to all types and sizes of libraries, and the examples used are models that can be followed with great success. A valuable list of selected readings is appended.

Strategic planning was described as

the process of identifying and describing a desired future state for a library and developing the basaic organizational tools for building support for that vision both within and beyond the library ... [it] is directed towards the goal of ... creating a desired future in terms of a longer (usually ten-year) time-frame. 32

Elements of the strategic planning process include a statement of library values and philosophy, a vision statement, an environmental analysis, an evaluation of current performance, and an action plan and plan for implementation.³³

HISTORICAL BACKGROUND

The organizational structure of the Leddy Library has developed and changed over at least the past twenty-five years, in order to adapt to particular circumstances, and to meet changing needs. Some changes were introduced in 1973, as the result of recommendations made in a report prepared by two systems analysts from the University Computer Centre. The consultants described the existing structure (shown in an organization chart attached as Appendix 1)³⁴ and then proposed a revised structure, which was intended to find a niche for two staff functions, namely Systems and Administration (as shown in an organization chart attached as

Appendix 2.) The consultants commented that

Under the present organizational structure, the levels of decision-making are too centralized as not enough responsibility and the corresponding authority have been delegated. Instances can be found in which highly qualified administrators are handling decisions that should be left to the librarians or the clerical staff. This centralization of decision-making has also resulted in poor communication, both upwards, downwards and horizontally throughout the library system. 35

They also developed a chart (attached as Appendix 3) which was intended to address the decision-making problems that they had identified. They defined the purpose and function of external committees, such as the Senate Committee of the Library, internal management committees, and various Task Forces and Standing Committees.³⁶

Although many of the recommendations of the consultants were implemented, the Library continued to progress from crisis to crisis. In a report dramatically titled *Library Operations: A Point of Decision*, the University Librarian, in 1980, submitted a number of recommendations to the Semnate Committee of the Library. These included a statement that

The organization of the library should be reviewed in order to improve the efficiency and effectiveness of available staff, and to re-assign functions within the restraints imposed by our collective agreements.³⁷

Following up on this report, he developed a short-term academic and financial plan for the Library, in which he stated:

It was the inability of the Leddy Library to meet [its] aims and objectives which prompted the undersigned to

formulate a five or six-year plan of a managerial and technical nature which is now under study by the Senate Committee of the Library and the Vice-President Academic. The dilemma is basically that a library staff of considerable talent and energy is currently playing a relatively passive role within the university because it cannot improve its services due to the lack of resources.³⁸

The Leddy Library has on occasion been the subject of research studies by students in the areas of engineering and business, which have focussed on topics such as work flow and structure. One of the more interesting papers was prepared by Bela D. Naidoo in 1982. She reviewed the functions of the Technical Services Division of the Library, and compared the design parameters to standard components, such as job specialization, training, unit size, and planning and control. She also described some of the liaison devices, such as standing committees and task forces.

She followed this up with an additional paper dealing with the internal and external environments of the Library. 40 She described the situation in Canada with respect to libraries, as these influences are brought to bear on the Leddy Library. She then discussed the severe internal problems brought about by financial constraints, and the effect on the effectiveness of the Library. She commented, most appropriately, with respect to technology,

A Task Force on Conversion to Automation began discussions in 1981 concerning the implementation of a total integrated automated system, but progress was impeded by uncertainty concerning the commitment of the University to the development of automated systems in the Library. Further discussion was halted, until the extent

of the financial resources available for the implementation of additional automated systems was apparent. Although the Leddy Library is automated to service basic functions, it is further behind any other Ontario library due to severe financial constraints.

Of particular relevance to the present discussion, was her section on the power structure, although she tended to confuse the internal decision-making structure (responsibility for the selection of books) with the external (allocation of financial resources). She did not address a significant aspect, namely the administrative decision-making structure.

Although her two papers consisted basically of a summary of the 1973 consultants' report, and information made available by Library administrators, they

did provide an interesting lead-in to a subsequent study commissioned by the University in 1985. The new President of the University was not satisfied with what little he had seen of the library operations, but he was cognisant of the problem highlighted by Naidoo with respect to lack of funding, and the need to develop a more sophisticated automated system which could compare favourably with those in other Ontario universities. The study was undertaken by Beckman Associates Library Consultants Inc., ⁴³ It has been much maligned by Library staff for its superficiality and lack of insight into certain characteristics peculiar to the University of Windsor. ⁴⁴ However, it cannot be denied that it had a significant impact on the organization and operation of the

Library, and was responsible for convincing the President that substantial additional funding for the development of automated systems was essential, if the Leddy Library was to be able to carry out its mandate.

The raison d'etre for the study was the perception that there was a universal dissatisfaction with the Library:

The Library and Library staff are perceived to be unresponsive to the needs of users, particularlyn faculty, and seemingly unable to provide even a basic level of service except in isolated instances.

Although the report contained a number of recommendations concerning procedures, budgeting, systems and services, disappointingly few dealt with organization or structure. The section on "reporting structure" dealt only with external issues: the role of the Vice-President Academic, and the Senate Committee of the Library (which was an anachronism in 1985, and still is.)⁴⁶ The consultants did, however outline what in their view were considered to be features of sound management, such as the need to set annual objectives, to define priorities, to establish effective communication, to delegate responsibilities, to initiate proper coordination, etc.⁴⁷ Six recommendations concerning management followed,⁴⁸ but none of these related to organizational structure.

As a result of what was perceived to be a serious omission in the so-called "Beckman Report," the present author decided to analyze the organizational structure that existed at the time of the Report, and to make recommendations concerning possible modifications to the hierarchical and decision-making structure. These recommendations were contained in a report dated January 3 1986, submitted to the President and Vice-President, Academic of the University. The Report included an organization chart of the existing structure (Appendix 4) which was patterned on the 1973 chart, but which illustrates some evolutionary changes. Two revised forms of organizational structure were recommended, one based on a functional hierarchy [Appendix 5 (a) and 5 (b)] and the other based on a matrix form of organization (Appendix 6). The Report concluded with an emphatic call for action:

Changes of the scope and magnitude that have been suggested will be difficult and time-consuming to implement, and, as has been indicated, in spite of a desire on the part of management and the staff itself, no progress has been made, because the problems associated with these changes have been considered to be insoluble. However, one has to begin somewhere, and if a systematic plan of action is developed, there is no reason why a beginning should not be made along the lines suggested: firstly, by reorganizing the Leddy Library, in order to make more effective use of existing library staff; then developing a long-range plan for automating all aspects of library service; followed by a realistic appraisal of staffing needs, in order to meet the objectives of the Leddy Library, and finally examining all the remaining recommendations of the Beckman Associates' Report, and implementing those which are considered to be the most viable and the most significant in developing and maintaining a superior library system.

An important principle which must be recognized in all of this is that the initiative for these developments must come from the University Librarian, supported in full measure by a Management Committee, a series of Task Forces established to deal with specific areas of concern, and the staff as a whole. However, above all, the support and commitment of the University Administration with respect to the attainment of these objectives, and the allocation of adequate resources, is an essential factor. 50

Notwithstanding the appeal to the President and the Vice-President, Academic, contained in the last sentence, no direct action was ever taken on this report, and no acknowledgment was ever received. It has been filed and forgotten.

However, some of the issues raised have been addressed during the ensuing eight years, and in particular the allocation of resources for the development of a state-of-the-art automated system. The administrative and organizational changes that have taken place, have been largely ad hoc and expeditious, in response to particular managerial or personnel problems, and to meet limited and short-term needs. It is felt that many of the problems still exist, and that the conclusions drawn and recommendations made are still valid. Therefore, much of what follows is drawn from this report.

GOALS AND OBJECTIVES

The Leddy Library functions as a segment of the larger unit of the University of Windsor, and is therefore subjected to and influenced by the goals and objectives of its parent institution. These were clearly articulated for the first time in the first report of the Academic Planning Committee of the Senate in 1984. 51 It is interesting to note that, although the report reviews the

academic programme of every faculty, there is no mention of the Library. In the questionnaire for the External Audit Survey, it appeared to be included in the item "Adequate facilities (libraries, labs., buildings., etc.)" These were rated as fourth most important by opinion leaders, third most important by teachers, and second most important by parents.⁵² This lack of focus on the library as an integral part of the University is an indication of the perceptions that the Senate, and therefore, the academic community, had of the Library at that time.

However, in the second report, which appeared in 1989, this omission was rectified, as three pages were devoted to a discussion of specific issues, such as access to the Library, conservation, disaster planning, space concerns and the problems of the Education Library. The also included a redrafted and updated mission statement, concerning the University as an international gateway, the transmission of knowledge, (i.e. teaching), the advancement of knowledge (i.e. research) and the university and the community. 54

A comprehensive statement of aims and objectives of the Leddy Library was first drafted by the University Librarian in 1972. 55 Subsequently, in 1981, this statement was revised and augmented by a Committee of Librarians, using the previously-cited *Library Operations: A Point of Decision* as a frame of reference. 56 This document is still in effect as a guide to the objectives of the Library. It included a list of nine objectives (Appendix 7),

covering the selection, acquisition, organization and preservation of library materials, and the provision of services to academic users and to the wider community. These objectives were then broken down into specific functions.

The second report of the University Academic Planning Committee (1989), previously referred to, focussed on some more immediate goals. such as the need to improve access to the collection by completing the automation of records in the NOTIS system, the continuing development of the library collections in order to meet the teaching and research needs of the University, the more effective use of available space, and the location of the Education Library.⁵⁷

PRESENT ORGANIZATION

The organization of the Leddy Library at the present time is shown in an organization chart attached as Appendix 8. In essence, it consists of two major functional divisions responsible for the day-to-day operation of the Library, namely the Technical Services Division and the Public Services Division. These are further subdivided into a variety of departments, organized along a mixture of functional and form lines. Each of the major departments is managed by a department head, and the sub-sections are managed by support staff supervisors. There are two staff officers, namely an administrative assistant to the University Librarian, and an

Automation Librarian.

Some of the weaknesses and inadequacies that had existed prior to the recommendations of the Beckman report in 1985 have been addressed, as highlighted in the present author's reorganaization blueprint, previously cited:

imbalance resulting from the lack of an Associate Librarian for Information Services, the mixture of division of labour by function and by form of material, by the dispersion of certain functions such as Secretarial Services, which could be centralized, by the establishment of positions for which no legitimate need has been justified, by the lack of functions for which there has been a very clear long-standing need, and for the lack of attention to the most effective utilization of all staff, including managerial, professional, support, supervisory and clerical. 58

The most significant organizational changes that have taken place since the appearance of this blueprint and the Beckman report are as follows:

1. The reference and collections functions have been consolidated into one department, under the direction of a department head. The former Reference Department had functioned in a collegial manner, and Beckman Associates had recommended eliminating the collections function, as this was perceived to be entirely a faculty responsibility. However, this philosophy has been rejected in favour of one which states

The selection of materials to be added to the Library's collection is performed by librarians in consultation with the faculty representatives and other members of the academic departments.⁵⁹

- 2. Responsibility for serials has now been dispersed: the cataloguing of serials has been integrated into the Cataloguing Department, and the acquisition of serials has been absorbed into a new Acquisitions Department, formerly called the Monographs Department.
- 3. The Documents Department continues to be responsible for all the functions related to government documents, including acquisition, processing and reference. However, a new responsibility has been added, namely Special Collections (which includes supervision of the Rare Book Room).
- 4. The responsibilities of the former Circulation Department have been expanded, and this unit has been renamed Access Services, under the direction of a librarian.
- 5. The position of Systems and Planning Librarian has been renamed, and is now referred to as Automation Librarian.

All of these changes have taken place as a result of ad hoc decisions, usually based on the departure of specific staff members. In most cases there was little or no discussion or consultation with the staff. As a general rule, however, the changes have worked out for the best, and have been accepted by the staff. It is believed that both of these aforementioned reports did, in an indirect manner, influence the decisions that were made concerning organizational changes.

A number of questions have been asked concerning the functions

of the various departments and managers. For instance, the role of the Department Heads and of the Associate Librarians are not sufficiently clearly defined. The place of the Education Librarian within the structure, particularly with respect to collection development and reference service, needs to be clarified. The need for centralized government document service, and its separation from reference service, should be studied. The place of Special Collections in the structure should be examined. And in particular, the ambiguous and ambivalent role of the Automation/Systems librarian should be settled once and for all.

DECISION-MAKING STRUCTURE

Final authority and responsibility for decisions rests with the University Librarian, and as in most professional bureaucracies, the management has been distinctively personal, and dependent on the style of the Chief Executive Officer. It has varied over the years from autocratic to permissive. As a general rule, attempts have been made to adopt a collegial approach to decision-making.

For the past few years, the most active operating committee has been the so-called Management Committee, which consists of the University Librarian, both Associate Librarians, the Administrative Assistant, the Automation Librarian, and all department heads. It is responsible for making decisions concerning policies and

procedures, and acts as a communications link between and among functional departments.

The University Library Administrative Committee was established in terms of the Collective Agreement, and was originally intended to be the Library equivalent of the academic departmental councils. Membership consists of the three administrative officers of the Library, and all librarians. The mandate of the Committee is

to recommend on the formulation of library policies and procedures. 60

The terms of reference, which were approved by the Committee on June 26 1980, include the following:

The Committee shall make recommendations on policies that are library-wide in scope ... The Committee shall make recommendations on procedures which affect the majority of users and/or staff ... The Committee shall make all its recommendations to the University Librarian/Chairperson for handling or for channeling to the appropriate recipient. 61

The effectiveness of ULAC has since its establishment been dependent to a large extent on the commitment of its members, and the direction and leadership provided by the Chairperson. There is still some ambiguity, at least in the minds of librarians, as to the respective roles of the Management Committee and ULAC. The opinion has been expressed that the two bodies overlap, and should perhaps be consolidated.⁶²

Committees have been established from time to time to address

particular functions, and the most successful and active to date have been the Collections Committee and the Systems Committee.

Other special purpose Standing Committees, such as those on LKibrary Handouts and Bibliographic Instruction have been effective.

Most of the administrative units function in a hierarchical manner, and the work is assigned by the Department Head or Supervisor, and the staff follow specific procedures or rules. However, departments with a substantial professional component, such as Reader Services, continue to operate in a collegial manner, even though the Department Head does provide leadership, direction and coordination.

CONCLUSIONS

As indicated at the outset, as a result of severe time restrictions, as well as the magnitude of the task that was revealed as this study progressed, it will not be possible at this stage to do any more than review the literature on the subject, report on the historical background, and describe the current organizational and decision-making structure of the Leddy Library. It is only a beginning, but a common thread has been revvealed. It has been shown that libraries in general, and the Leddy Library in particular, are slow to change, and that when they do change, it is not usually as a result of a carefully-thought-out and rationalized

plan, but is driven by external factors, or factors over which the Library has no control.

These factors can be insufficient resources, human resource instability or the impact of technology. Repeatedly, changes have been made without a clear understanding of the likely impact, or recommendations have been made without any follow-up action.

The assumption should not be made that reorganization will necessarily result in an improvement. The reorganization should develop from a carefully-thought-out articulation of need. Hence the sub-title to this paper.

The process should therefore be, firstly to study theoretical aspects of the topic, secondly to look at historical developments, and thirdly to examine the current situation. These steps have begun with the present project, but require a great deal more study and analysis.

The next step should be to review and reaffirm or revise the statement of aims and objectives, or the mission of the Leddy Library. It will then be possible to develop a strategic plan for the short term (two years) and for the long term (five to ten years). A more appropriate organizational structure should develop from this plan.

However, it is possible for the Leddy Library to control its own destiny, and for librarians to shape the environment in which they function. All that is required, as stated in the

aforementioned *Blueprint*, and repeated by many writers in the field of organization and management, is an undertaking from the University Administration to support the attainment of the stated objectives, the leadership and support of the University Librarian, and the commitment and participation of the Library staff.

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