Achieving Organizational Excellence

- Optional Discussion Sections: Thursday, 6:30 – 7:30 pm, Fall 2020
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Course Description

This course focuses on core competencies needed to lead and manage information-based cultural institutions (libraries, archives, museums, historical societies) in the 21st century. The course provides an overview of the principles, practices, and techniques required for effective leadership and management, and focuses on innovative strategies, management responsibilities, and the skills needed to achieve and sustain high organizational performance.

This course is intended to provide students with an opportunity to critically explore issues in leadership, management, and organizational theory in cultural heritage institutions. This includes both leaders’ roles in change and ways leaders make sense of the organizations they lead. Students will explore both how organizations function and leadership choices within organizations, and they will have an opportunity to begin to develop a vision of their leadership practice in conversation with leaders from cultural heritage institutions.

The course will also provide students opportunities to critically explore the need for leadership in cultural heritage institutions to evolve center social justice, social change, diversity, equity, and inclusion.

Learning Outcomes

At the conclusion of this course, successful students will or will be able to:

1. Connect major leadership theories, and apply these to the understanding of real-world leadership practice in information organizations;
2. Analyze leadership issues using theoretical frameworks for understanding organizational behavior and outcomes in information organizations;
3. Engage with leaders in the field to refine situated understanding of leadership in information organizations;
4. Contribute an essay to the collaborative production of an open access book profiling leaders in information organizations;
5. Situate approaches to leadership into critical frameworks necessary to advance social justice, social change, diversity, equity, and inclusion;

COVID-19 Challenges

This course was originally planned to be an in-person face-to-face course. In light of the global pandemic, it has transitioned to be a fully online course. Recognizing that this is not the format which students registered for, and that the COVID-19 pandemic is creating a wide range of difficulties and challenges for students, I have structured this course to support flexible approaches to participation and engagement. With that noted, any students who need any additional accommodations should reach out so that we can develop a plan to address the issue.
Overview of Assignments

This course is built around three primary sets of assignments over the period of the course. This section provides all the information required to complete these assignments over the course of the semester. Coursework completed on time and meeting the requirements outlined below will receive full points/credit. For any work that does not meet the requirements, students will be notified and have a chance to revise work to receive full points/credit.

1) **Integrative Shared Journaling** (35% of grade)

Each week you will journal about your reflections on the readings and their relation to your own developing ideas about leadership in information organizations. Create your journal as a one discussion post in Canvas. Post each new entry as a reply to the original discussion post for your whole journal. That will mean that you end up with 14 weekly responses in your journal thread.

Each weekly journal entry should:

- be 500-1200 words
- be posted in your journal thread in Canvas before midnight Saturday each week
- respond to some of the issues raised in the weekly journaling prompt in the syllabus
- reference specific points and notes from the week’s readings
- demonstrate integrative thinking relating the course readings to your experience and your objectives for your career (when relevant)
- include reflection and integration with activities from your leadership profile project activities 9 as relevant)

2) **Participation & Peer Learning Engagement** (30% of grade)

A big part of the learning in a course like this is based on connecting with your peer students and developing each other’s ideas and approaches to organizational development and leadership. In support of that, there are three primary ways you can participate in learning with your peers.

1) **Peer learning partners:** I have paired each of you with a peer learning partner for each section of the course. You will have a total of four peer-learning partners over the course of the semester. See ELMS for a listing of who you are partnered with for each period.
   a. The four periods are; week 1-4, week 5-7, week 8-10, and week 11-14.
   b. For each period you need to set up weekly check-ins with your peer learning partner, these can happen over the phone, or skype, but should ideally be synchronous interactions.
   c. At the end of each period you will need to send me a 300-500 word note reflecting on the experience of working with your partner for that period. This note should share how you communicated with each other and highlights of what you learned from engaging with your partner.

2) **Discussion and dialog on journal posts:** Beyond posting to your own journal, you should plan to spend time reading and commenting on some of your fellow students’ journals.
   a. Everyone needs to read and responded to provide a substantive response to their current peer learning partner’s journal entries. In this case substantive means that you 1) respond specifically to issues they have raised 2) that you share your own perspective and thoughts and 3) that you anchor your comments in content from the course readings.
b. If you do not participate in the optional weekly discussion sections, you will need to read and similarly provide substantive responses to 3-5 of your other fellow classmates' journals.

3) **Optional weekly discussion section via Zoom**: Each week I will host an optional hour-long zoom discussion section.
   a. The discussion section meets between 6:30-7:30 each Thursday on Zoom.
   b. This will be a lightly structured opportunity for further discussion and engagement with the week's readings and a chance to work through any questions' students have about the assignments.
   c. These sessions are optional, students wishing to take the course entirely asynchronously can receive full credit for participation by engaging in discussion on other students' journal entries.

3) **Leadership Profile Project** (35% of grade)

Over the course of the semester you will interview a leader in the field and develop an essay for an open access book on leadership in information organizations. You will connect with a leader in the field and synthesize their perspective with your developing understanding of theories of leadership from the course readings. We will work toward this goal through a series of stages. Plan to engage on each stage in this process with your peer learning partners.

1. **Identify and confirm the leader you will profile (Due Week 3)**. You need to make contact with the individual you will work with and confirm they are willing to participate.
   a. Based on your interests, I am happy to provide a list of people that you could reach out. I am also happy to support you in reaching out to them.
   b. If you chose, you can also identify and contact someone directly yourself. They should have at least 3 years of experience in a leadership role in an information organization.
   c. Along with confirming their participation, you will also ask them what 3-5 articles or books have been most influential in the development of their perspective on leadership. Treat whatever readings they recommend to you as extensions to the course readings.
   d. Planning ahead, while confirming the person you are going to work with, this is also a great time to set a date and time for conducting your interview with them which you are going to need to complete by the end of week 7.

2. **Read up on their background and experience and draft interview questions (Due Week 5)**. You will read up on this person’s background and work. You also need to review the literature they identified as key to their perspective.
   a. Based on the readings and your understanding of their background, you will develop a set of 6-8 interview questions for an hour-long interview. Demonstrate that your familiarity with their work and reading recommendations by including specific references to both in the draft questions.
   b. Share the interview questions with your peer learning partner and the instructor for input.

3. **Revise interview questions and conduct interview (Due Week 7)**. Revise your interview questions based on feedback from your peer learning partner and the instructor and conduct the interview.
   a. Send the questions to your interviewee with at least a week notice for them to review in advance.
   b. These are busy people so it is likely a good idea to schedule this interview time well in advance.
   c. Ideally this should be a synchronous interview in which you record the interview to ensure that you accurately capture direct quotes.
4. **Draft leadership profile (Due Week 11):** Based on that interview and the course readings, you will develop a leadership profile essay.
   a. This will present the individual’s perspective on leadership and connect their experience with the literature they identified and readings from the course.
   b. The profile should be 3,000-5,000 words, use APA style, and include a bibliography with at least 5-10 references cited in the text.
   c. Use the word template provided by the instructor which you can find in ELMS.

5. **Peer review two other leadership profiles (Due Week 12):** You will peer review two of your peer learning partner’s leadership profiles.
   a. In this review, you will provide them with constructive comments to revise and improve their essay.
   b. You will also share your profile with your subject for them to provide input and feedback.

6. **Final essay (Due Week 14):** You revise your essay based on feedback from your peers, the instructor, and your interview subject.

7. **Inclusion of your essay in open access book (conclusion of semester):** Unless you chose to opt out, all of the collected essays from the course will be assembled into an open access book which will be published under a [CC-BY license](https://creativecommons.org/licenses/by/4.0/) on LISSA.

**Books:**

In this course, we will read four books. *Reframing Organizations* (Bolman & Deal) and *Management Basics for Information Professionals* are textbooks (Evans & Greenwell). The former is the primary text of the course and we will use selections from the latter to round out the semester. Both are available from the library as eBooks, so it is not necessary to purchase them. With that noted, Bolman and Deal is a very useful text to keep with you and annotate, so if you want to get a copy of it it’s a good resource to take with you.

The other two books, *Drive* (Pink) and *Systems Thinking for Social Change* (Stroh) are books we will each read in one week, *Drive* in week 6 and *Systems Thinking* in week 13.

Course Schedule

Week One: Getting Started Oriented (Aug 31-Sep 6th)

Journal Prompt:

- This is the first week of the course. Use this first journal entry to introduce yourself to your fellow classmates. Set up your journal in ELMS and use this first post to show that you know how to get that working. Review the syllabus and share out about what topics you are most interested in learning about.

Readings:

- Read and review the syllabus: Ask any questions you have about the syllabus in a dedicated thread in ELMS on this topic or join the optional discussion section on Zoom to ask additional questions.

Peer Learning Partners:

- Reach out to your peer learning partner and establish when and how you are going to check in with each other for weeks one, two, three and four.

Assignments:

- Email Trevor (tjowens@umd.edu) with ideas about who you would like to reach out to interview for your leadership profile essay project. If you have a person in mind that you would like to work with that works great. If not, just tell me some things about the area and background you would like for someone to work with and I can help identify and connect you with someone.
Week Two: Making Sense of Organizations (Sep 6-13)

Journal Prompt:

- Bolman & Deal provide us with four distinct frames for approaching leadership issues in organizations. Do you default to any of the? Do you think any of them are more important than the others? Also reflect on the relationship between the four frames and issues in Bolmen & Deal and how they connect with the issues that Rana Salzmann and Magda Pecsenye have identified in a library context. Consider the problems that both the article and the introductory section to the book lay out for organizations and leaders and related some of their observations and points to your own experience with information organizations. You might also consider comparing/contrasting how Bolman and Deal open their book with how Evans and Greenwell open their book. What do you make of their different approaches and perspectives?

Readings:

- Part One: Making Sense of Organizations (Bolman & Deal, p.1-43)
  - Chapter 1: Introduction: The Power of Reframing
  - Chapter 2: Simple Ideas, Complex Organizations
- Chapters 1 & 2 Introduction & Organizational Issues in Evans & Greenwell (p 1-29)

Peer Learning Partners:

- Discuss issues raised in the readings and your journal with your peer learning partner.
Week Three: Engaging with the Structural Frame (Sep 14-20)

Journal Prompt:

- This week we dive into Bolman & Deal’s first frame, the structural frame. Along with that, we are reading about similar issues relating to accountability, authority, power and delegation from Evans & Greenwell. Lastly, we are each going to look up the organizational charts for several library organizations (most libraries, archives and museums have them posted online). Use this journal entry to reflect on how those org charts are set up to establish a structure to support the mission and objectives of the organization. Consider how those org charts relate to the issues raised in this weeks readings.

Readings:

- Part Two: The Structural Frame (Bolman & Deal, p. 43-112)
  - Chapter 3: Getting Organized
  - Chapter 4: Structure and Restructuring
  - Chapter 5: Organizing Groups and Teams
- Chapter 6 Accountability, Authority, Power, and Delegation (Evans & Greenwell p. 77-88)
- Look for the org charts of 3-5 libraries, archives, or museums and compare and contrast them. Most cultural heritage organizations include them on their websites or in their strategic plans. What do you think their structure says about how they are organized and function?

Assignment Due:

- Identify and confirm the leader you are going to profile. Email Trevor to confirm who you will be working with before Saturday at midnight.

Peer Learning Partners:

- Discuss issues raised in the readings and your journal with your peer learning partner.
Week Four: Silos, Reorganizations & Consultants (Sep 21-27)

Journal Prompt:

- This week we continue our exploration of issues in the structural frame with more of a specific focus on examples from information organizations. Think about the general issues that Bolman and Deal laid out in their chapters and connect them into the issues relating to how departments in organizations work together in these articles. Articles this week explore issues with “silos”, reorganizations, and management consultants. Each of those topics could be interesting things to journal on. To what extent do these articles demonstrate the points that Bolmen and Deal and/or Evans & Greenwell identified? To what extent do they complicate or challenge those points?

Readings:

- Davis, Transforming Technical Services Evolving Functions in Large Research University Libraries https://journals.ala.org/index.php/lrts/article/view/5901/7465

Peer Learning Partners:

- Discuss issues raised in the readings and your journal with your peer learning partner.
- Reach out to your second peer learning partner and establish when and how you are going to check in with each other for weeks five, six, and seven.
Week Five: Engaging with the Human Resources Frame (Sep 28-Oct 4)

Journal Prompt:
- This week we begin exploring the Bolmen and Deal’s second frame, the human resources frame. This frame is focused on the way that an organization’s success is anchored in how it supports its staff’s ability to learn, grow and develop. In this context, it’s also important to explore the extent to which information professionals participate in a broader workforce. To that end, we are also reading up on salary statistics to understand broader issues in the library workforce. Consider reflecting on the extent to which your experiences working in information organizations fit with the points raised in this week’s readings.

Readings:
- The Human Resource Frame (Bolman & Deal, p. 113-178)
  - Chapter 6: People and Organizations
  - Chapter 7: Improving Human Resource Management
  - Chapter 8: Interpersonal and Group Dynamics
- Chapter 13 Staffing (Evans & Greenwell 175-190)

Peer Learning Partners:
- Discuss issues raised in the readings and your journal with your peer learning partner.

Project Assignment due:
- Draft interview questions due by midnight on Saturday. Post your draft interview questions as an additional entry in your journal this week.
Week Six: Autonomy, Mastery, & Control: How motivation works (Oct 5-11)

Journal Prompt:

- This week we continue exploring issues related to the human resources frame, but we dive deeper into what motivates and what de-motivates people in organizations. Reflect on the framework that Pink provides for motivation and flow and consider your own experiences. When and how has an information organization supported you in autonomy, mastery, and control? Related, consider the issues about burnout that Geary and Hickey raise. Given that librarianship is something that so many people are motivated to get into how and why does burnout happen?

Readings:

Peer Learning Partners:

- Discuss issues raised in the readings and your journal with your peer learning partner.
- Provide feedback to your partner on their draft interview questions before Saturday at midnight.
Week Seven: Exploring the Political Frame & Finances (Oct 12-18)

Journal Prompt:

- This week we begin exploring issues of the third frame, the political frame. The central question of the political frame is given the scarcity of resources and the fact that different agents in an organization have different objectives. Given that, it becomes important to understand how to build coalitions to meet your objectives. In this context, we are also thinking about how our organizations allocate financial resources to meet their missions. Along with reading chapters in Bolman & Deal we will consider resources that provide info on budgets and finances of information organizations. How do you see the questions Bolman and Deal lay out relating to specific issues in information organizations? Consider how ARL libraries and Public Libraries invest their resources from the ARL statistics and the IMLS public library survey data. What do you think the allocation of resources in those reports suggests about issues related to the political frame?

Readings:

- The Political Frame (Bolman & Deal, p. 179-234)
  - Chapter 9: Power, Conflict, and Coalition
  - Chapter 10: The Manager as Politician
  - Chapter 11: Organizations as Political Arenas and Political Agents
- Skim and explore these resources about library & archive budgets. In both cases focus on issues in these reports related to budgeting and funding.

Project Assignment Due:

- Revise interview questions and conduct interviews before Saturday at midnight.

Peer Learning Partners:

- Discuss issues raised in the readings and your journal with your peer learning partner.
- Reach out to your third peer learning partner and establish when and how you are going to check in with each other for weeks eight, nine, and ten.
Week Eight: Political Capital and Budgets (Oct 19-25)

Journal Prompt:

- This week we continue our explorations of the political frame and budgeting in information organizations. We also consider a series of readings that discuss ethics around how jobs in information organizations are established and paid. Draw out some key issues from these readings and relate them to your own experience and to the larger frameworks that Bolmen and Deal provide. Think about some of the intersections between the political frames focus on resources and the focus on supporting people in developing their careers from the human resources frame. Now that you’ve completed your interview, also consider using this as an opportunity to integrate comments from your interview subject into your reflections.

Readings:

- Chapter 17 Managing Money Evans & Greenwell (p. 233-246)
- Chapter 20 Managing Facilities Evans & Greenwell (p. 273-284)

Peer Learning Partners:

- Discuss issues raised in the readings and your journal with your peer learning partner.
Week Nine Exploring the Symbolic Frame (Oct 26- Nov-1 )

Journal Prompt:

- This week we begin our exploration of the fourth frame, the symbolic frame. Along with that we are going to identify and read some strategic planning or annual report documents for information organizations. For this journal entry, draw out the way that various aspects of the symbolic frame come through in those strategy and planning documents. Also consider this as an opportunity to think through the way that symbols, performance, and ritual play key roles in the function of information organizations. Now that you’ve completed your interview, also consider using this as an opportunity to integrate comments from your interview subject into your reflections.

Readings:

- Part Five: The Symbolic Frame (Bolman & Deal, p. 235-294)
  - Chapter 12: Organizational Symbols and Culture
  - Chapter 13: Culture in Action
  - Chapter 14: Organization as Theater
- Chapter 7 Vision, Mission, and Planning (Evans & Greenwell p. 89-101)
- Find 3 information organizations strategic plans or annual reports and identify how they describe their mission, vision, and values. Most Libraries, archives and museums post these online on their websites. Think about how they engage with issues and aspects from the symbolic frame.

Peer Learning Partners:

- Discuss issues raised in the readings and your journal with your peer learning partner.
Week Ten: Symbolic Frames in Cultural Heritage Institutions (Nov 2-8)

Journal Prompt:

- This week we continue our exploration and discussion of the symbolic in information organizations. In this context, it’s important for us to be thinking about broad cultural themes in the field. This week we focus on vocational awe, culture change, maintenance and care, and the role of information organizations in oppression. How do you integrate these into your own ideas about the symbolic function and role of information organizations? Now that you’ve completed your interview, also consider using this as an opportunity to integrate comments from your interview subject into your reflections.

Readings:

- “Information Maintenance as a Practice of Care: An Invitation to Reflect and Share” (June 17, 2019), https://zenodo.org/record/3251131#.Xy8fVfhKijg

Project Assignment Due:

- Draft leadership profile due by Saturday at midnight. Post your draft as an attachment on an additional entry in your journal so that your peers and the instructor can get access to it to give you feedback on the draft.

Peer Learning Partners:

- Discuss issues raised in the readings and your journal with your peer learning partner.
- Reach out to your fourth peer learning partner and establish when and how you are going to check in with each other for weeks eleven, twelve, thirteen, and fourteen.
Week Eleven: Improving Leadership Practice (Nov 9-15)

Journal Prompt:

- This week we finish off the Bolmen and Deal book with their concepts for how to improve leadership practices. What do you make of their conclusions? How comfortable do you feel in applying the frames to specific contexts in information organizations? Consider using this prompt as a place to try out their reframing suggestions to review a challenging situation you have faced at work in the past. We also conclude with a bit from Evans and Greenwell on “creating your career.” You can use that as a prompt to reflect on where you see this course ultimately taking you. This week you are also peer reviewing two of your classmates drafts, so you could also consider using this journal entry as a place to reflect on what you learned from their essays.

Readings:

- Part Six: Improving Leadership Practice (Bolman & Deal, p. 295-418)
  - Chapter 15: Integrating Frames for Effective Practice
  - Chapter 16: Reframing in Action
  - Chapter 17: Reframing Leadership
  - Chapter 18: Reframing Change in Organizations
  - Chapter 19: Reframing Ethics and Spirit
  - Chapter 20: Bringing It All Together
- Chapter 22 Creating your career (Evans & Greenwell p. 301-313)

Project Assignment due:

- Peer review both your third peer learning partner’s draft essay and your fourth peer learning partner’s draft essay. Provide substantive and constructive feedback on their drafts and post your comments on the journal entry they put up where they shared their draft. Post your comments by midnight on Saturday.

Peer Learning Partners:

- Discuss issues raised in the readings and your journal with your peer learning partner.
- Discuss you’re draft essay with your peer learning partner.
Week Twelve: Power & Equity Across the Frames (Nov 23-29)

Journaling Prompt:

- Now that we have a handle on all four of the frames that Bolman and Deal present, we are going to delve more deeply into a series of critical questions about power and equity in information organizations. After reading these essays, consider the extent to which the issues they raised do or don’t fit into the framework that Bolman and Deal have presented. Along with that, reflect on the extent to which these readings speak to your own experience in information organizations.

Readings:

- Collins, Language power and oppression in diversity [https://muse.jhu.edu/article/706987](https://muse.jhu.edu/article/706987)

Peer Learning Partners:

- Discuss issues raised in the readings and your journal with your peer learning partner.
Week Thirteen: Systems thinking and social change (Nov 30-Dec 6)

Journal Prompt: So far this semester we have been focused largely on how organizations function and how people navigate work inside organizations. For this last reading, we expand outward to think about the roles that organizations play in broader complex systems and the ways that they do and don’t support necessary social change. We also delve more deeply into ideas around complexity and systems thinking. For this journal entry, take the examples and situations that Stroh describes and try applying them to examples you’ve experienced or read about in information organizations.

Readings:


Project Assignment due:

- Post your revised and final draft of your essay as an entry in your journal. If you do not want your essay included in the open access book of essays contact Trevor to confirm that with him.

Peer Learning Partners:

- Discuss issues raised in the readings and your journal with your peer learning partner.
Week Fourteen: Reflect and Share (Dec 7-13)

Journal Prompt:

- You did it! Congratulations on completing nearly all of the course work. Take time this week to read your classmates essays. Use this last journal prompt to reflect on what you’ve learned through the process of the course. What things weren’t you expecting? What things do you think are going to be most useful to you as you move forward in your career?

Readings:

- Read the final versions of your classmates’ essays

Peer Learning Partners:

- Take time to reflect on the course with your peer learning partner. What are your primary take-aways from participation in the course?