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Organizational Assessment: An Academic Library Case Study

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Multidimensional approaches to organizational assessment predate the relatively recent “Balanced Scorecard” approach for measuring organizational performance popularized by Kaplan and Norton in the 1990s. Georgopolous and Tannebaum cited multiple effectiveness measures in the 1950s. Kanter and Brinkerhoff researched the topic in the early 1980s. Cameron published multidimensional organizational assessment literature specifically related to higher education beginning in 1978. Calvert and Cullen conducted library-specific multidimensional organizational performance studies in the mid-1990s.

In this academic library case study, the concept of a multidimensional approach to organizational assessment focuses on one of Kaplan and Norton’s four Balanced Scorecard dimensions, “Learning and Growth”, as its measurement target. Kaplan and Norton’s “Learning and Growth” dimension is related to one of Kanter and Brinkerhoff’s three described types of organizational effectiveness, “appropriate organizational structure and process, including organizational characteristics, member satisfaction, motivation, communication links, internal conflict resolution, absence of strain between subgroups, etc.”

To assess the dimension of “Learning and Growth” or “appropriate organizational structure and process,” the University of Connecticut Libraries measured the extent to which articulated organizational values were achieved through a library-wide reorganization. The assessment was first conducted three years after an organizational restructuring and was repeated three years later using a virtually identical methodology. Results from both the original assessment, conducted in 1999, and the subsequent follow-up study, carried out in 2002, are reported.

Background

Multidimensional approaches to organizational assessment date back at least fifty years. Georgopolous and Tannenbaum’s 1957 study, for example, cited four measures of effectiveness in a manufacturing setting. Despite its duration, however, there has been little agreement on basic definitions and approaches. Kanter and Brinkerhoff proposed that the most interesting questions related to organizational assessment are not technical, but rather conceptual. How to measure effectiveness was less interesting to them than what to measure, the selection of definitions and techniques, and how effectiveness is linked to an organization’s structure, functioning, and environmental relations (Kanter and Brinkerhoff, 1981).

One author cited productivity as “encompassing efficiency, effectiveness, and their symbiotic relationship” (Balk, 1974). In another model, productivity was but one of ten

organizational assessment indicators (Macy and Mirvis, 1976). Kanter and Brinkerhoff proposed three kinds of effectiveness:

- (1) Task effectiveness or goal attainment, including output, results, efficiency, etc.;
- (2) Appropriate organizational structure and process, including organizational characteristics, member satisfaction, motivation, communication links, internal conflict resolution, absence of strain between subgroups, etc; and
- (3) Environmental adaptation, including flexibility in the face of change, resource acquisition, and longer-term adaptation and survival.

Cameron's important work in the 1980s sets a useful context for understanding the importance of organizational effectiveness, especially for managers and laymen. Earlier academic literature on the subject had criticized organizational effectiveness studies on the grounds that they:

- Failed to adequately identify indicators of effectiveness;
- Relied too much on single indicators of effectiveness, ignoring relationships between multiple factors;
- Failed to create an adequate level of specificity; and
- Over-generalized when considering dissimilar organizations or subunits. (Goodman, Atkins, and Schoorman, 1983)

Cameron dismissed these inadequacies as researchers' concerns and argued for the importance of organizational effectiveness measures when managers, consumers, and others have important choices or judgments to make. Cameron also concluded that criteria of effectiveness are especially ambiguous in organizations that lack clearly defined goals. (Cameron, 1986)

Turning his attention specifically to higher education, Cameron cited the importance of organizational assessment in higher education because, as Bennis wrote in 1976:

Unquestionably, universities are among the worst managed institutions in the country.... One reason, incredibly enough, is that universities – which have studied everything from government to Persian mirrors and the number 7 – have never deeply studied their own administration. (Cameron, 1986)

Cameron acknowledged four dimensions for organizations to reflect their effectiveness:

- The Goal Attainment Model;
- The Systems Resource Model;
- The Internal Processes Model; and
- The Constituency Satisfaction Model. (Cameron, 1981)

Cameron also isolated five major factors as predictors of organizational effectiveness:

- External environment;
- Institutional structure;
- Institutional strategy;
- Institutional demographics; and
- Institutional finances. (Cameron, 1986)

Cameron concluded by proposing that:

- The most critical of these five factors are “the external environment” and “institutional strategy;”
- Proactive institutional strategies that address the external environment are more successful than those geared toward internal institutional matters; and
- Multidimensional management strategies are required to improve higher education institutions’ organizational effectiveness. (Cameron, 1986)

Cullen and Calvert conducted public library effectiveness studies in New Zealand (Calvert and Cullen, 1994) with the aim of replicating the majority of the Public Library Effectiveness Study (PLES) developed in the United States several years earlier (Childers and Van House, 1990). Childers and Van House’s methodology, in turn, was derived from earlier organizational effectiveness studies of not-for-profit organizations that were based on Cameron’s multidimensional construct (Calvert and Cullen, 1996).

Calvert and Cullen isolated thirteen dimensions and grouped them into four models of organizational effectiveness:

- The Goal Attainment Model
 - Range and Depth of Services
 - Access Services
 - Reference and Information Services
 - Customer Services
 - Programs and Events
- The External Systems Model
 - Financial Inputs
 - Physical Environment
 - Staffing
- The Internal Process Model
 - Management Culture and Direction
 - Collection Management
 - Technical Processes
- The Strategic Constituencies Model
 - Community Use and Satisfaction
 - Relations with Councillors and Council Management (Calvert and Cullen, 1994)

Following the development of academic library performance measures by Kantor and Van House, Weil, and McClure, Cullen and Calvert attempted to test Cameron’s concepts

in their New Zealand University Libraries Effectiveness Study (NZULES) by questioning:

- Are there different perceptions of effectiveness among the various “members” or stakeholders of a New Zealand university library?
- Can dimensions of performance be observed that indicate there are dimensions of effectiveness that could be used as a basis for performance measurement?
- Can a core range of dimensions be identified between this and other studies that would support a small, well-targeted set of empirically based performance measures that could be widely adopted? (Cullen and Calvert, 1996)

After NZULES, Cullen and Calvert concluded that:

...there might well be some core dimensions of effectiveness that can be used for judging effectiveness, and as a basis for performance measurement, in both public and academic libraries. Furthermore, it would seem that the perceptions of effectiveness held by the various constituencies or stakeholders of the organization must be taken into account when a set of performance measures is being developed for the library if the multivariate and multidimensional nature of organizational effectiveness is to be fully encompassed. In other words, the different perceptions of the organization held by its various members must be incorporated into any assessment of its effectiveness. (Cullen and Calvert, 1996)

Lysons, Hatherly, and Mitchell successfully compared Cameron’s results in the United States to higher education institutions in the United Kingdom and Australia. Ikeuchi tested Cameron’s multi-dimensional assertions at Japanese academic libraries, finding that the most important effectiveness criterion for Japanese libraries was whether a library sufficiently supported its users’ research and educational activities and that document delivery was the most highly valued indicator. These international findings reinforced the validity of Cameron’s multi-dimensional approach to organizational effectiveness in cross-cultural settings.

Methodology

The University of Connecticut Libraries undertook a major reorganization effort in 1996. In the new organizational structure, four divisions and fifteen departments were eliminated and replaced by seven functional areas: Access Services; Administrative Services; Archives and Special Collections; Collections Services; Information Technology Services; the Regional Campus Libraries, and Research and Information Services.

The seven functional areas adopted internal team structures. Access Services, for example, is comprised of a Circulation/Reserve Team, a Document Delivery/Interlibrary Loan Team, and a Media Library Team. The area teams are supplemented by cross-functional, inter-area operational and project teams for efforts that involve staff from

more than one functional area (e.g., Web Publishing Team, Networked Services Team, USER team, Liaison Advisory Team).

The Libraries Leadership Council, comprised of the directors of each functional area and the Director of University Libraries, was created to formulate overarching library policies, charge cross functional teams, oversee library budgets and staffing decisions, and set annual library wide goals.

Eighteen criteria were articulated by the Libraries' Organizational Review Project Team to measure the success of the Libraries' reorganization efforts. Most of these criteria were a response to organizational deficiencies voiced by library staff during the formulation of a strategic plan, completed a year earlier, and open meetings with library staff during the organizational review process. The eighteen articulated measures of success for the reorganization were:

- 1) Positioning the Libraries for the future;
- 2) Being client centered and responsive to user feedback;
- 3) Delivering excellent basic services to users;
- 4) Demonstrating appreciation and consideration for individual differences;
- 5) Ensuring that library staff had a shared vision of the Libraries' future;
- 6) Being positioned for user outreach;
- 7) Playing a leadership role in campus information policy;
- 8) Empowering staff with respect to operational responsibilities;
- 9) Reflecting shared leadership and mutual respect among library staff;
- 10) Ensuring reasonable library staff workloads;
- 11) Setting realistic expectations as to what library staff could accomplish effectively;
- 12) Minimizing organizational boundaries between the Libraries' functional areas;
- 13) Displaying strong inter-area cooperation;
- 14) Fostering good communications throughout the Libraries;
- 15) Making the decision-making structure clear to staff;
- 16) Integrating the regional campus libraries into the overall library system;
- 17) Continuously seeking efficiencies and quality improvements; and
- 18) Placing accountability at appropriate levels in the organization.

Once the Libraries-wide reorganization was completed, each of the seven functional areas was charged with selecting and implementing an internal organizational structure to best carry out its charge. Fifteen measures of success were identified for the seven functional areas' organizational design efforts:

- 1) Focusing first on dedicating resources to achieve the Libraries' strategic initiatives when doing its annual planning before moving on to Area and individual goals;
- 2) Positioned for the future;
- 3) Client-centered and responsive to user feedback;
- 4) Delivering excellent basic services to users;
- 5) Showing consideration for individual differences;

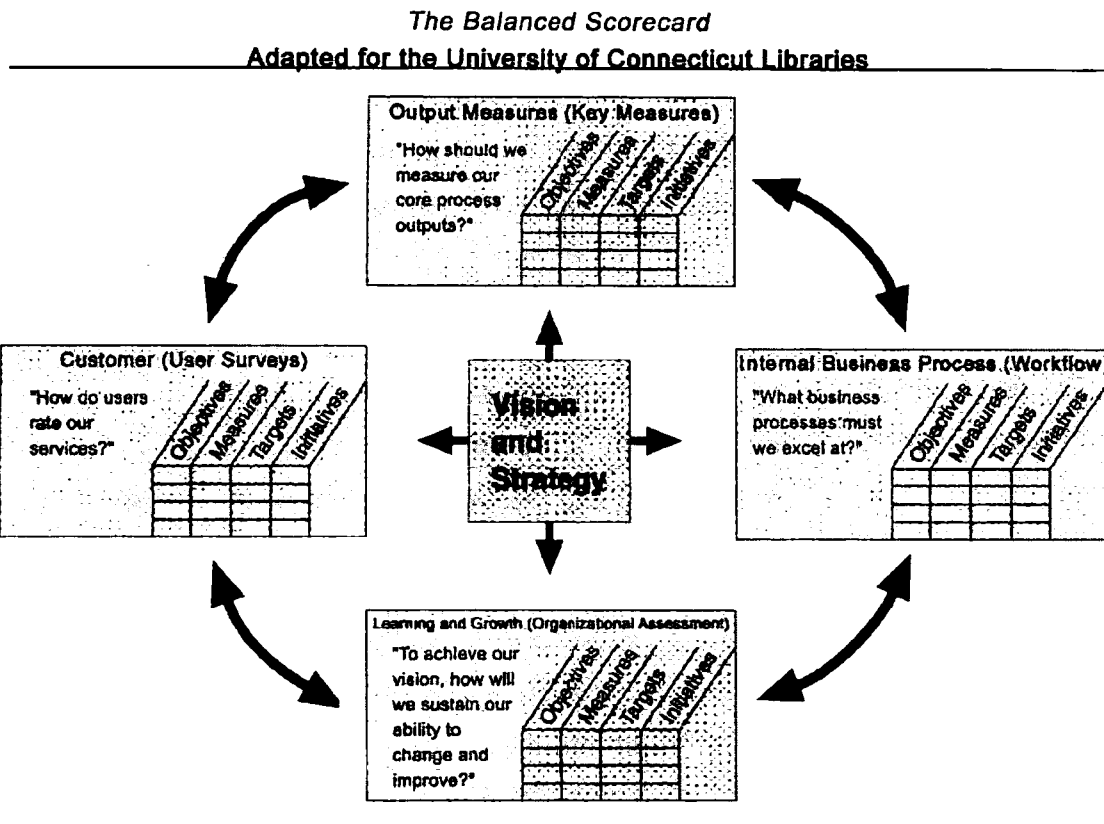
- 6) Having a shared vision of the Area's future;
- 7) Positioned for user outreach;
- 8) Empowering Area teams to make decisions at an operational level;
- 9) Holding teams accountable for their decisions and responsibilities;
- 10) Fostering a strong sense of shared leadership in the Area;
- 11) Mutual respect among Area staff members and teams;
- 12) Minimizing boundaries between Area teams and demonstrating strong cooperation among Area teams;
- 13) Clear Area decision-making structure;
- 14) Good communication throughout the Area; and
- 15) Continuously seeking efficiencies and quality improvements.

In 1999, three years after the library and functional area reorganizations were complete, the Libraries undertook an organizational assessment to determine the effectiveness of the Libraries' reorganization efforts. The goals were two fold: (1) to determine library-wide progress toward the objectives that had been set for the Libraries and (2) to determine the effectiveness of each functional area's internal organizational structure, as compared to the measures of success initially set for the seven functional areas. A subsequent organizational assessment, similar to the first, was conducted in 2002.

The two organizational assessments were primarily based on a staff survey. In 1999, a library organizational development consultant, Maureen Sullivan, also interviewed library staff to follow-up on issues raised in the staff survey. Her report outlined a number of actions the Libraries needed to initiate to address staff concerns revealed during the staff survey and interviews with staff members.

It is important to note at this juncture that these staff surveys represented only one aspect of the Libraries' multidimensional approach to organizational assessment. Various user satisfaction surveys, another gauge of how well the Libraries were performing, were also conducted between 1996 and 2002, including a faculty survey (1996), a graduate student survey (1997), an undergraduate survey (1998), LibQual+ (2001), and a web-based survey of all users (2002). The Libraries also undertook major efforts to create a Statistical Data Information System (2000-2003) to effectively measure and report outputs and a workflow study to improve internal processes. The organizational assessment related to the Libraries' reorganization efforts was one component of a four-part approach adapted from Kaplan and Norton's Balanced Scorecard approach. (See Figure 1)

Figure 1



Source: Robert S. Kaplan and David P. Norton, "Using the Balanced Scorecard as a Strategic Management System," *Harvard Business Review* (January-February 1996): 76.

The survey administered to library staff in 1999 and 2002 consisted of eighteen statements about the Libraries in general and fifteen statements about each staff member's own functional area. The statements were directly related to the measures of success that were originally identified in 1996. A sample statement assessing the Libraries as an organization, for example, was: "The UConn Libraries are positioned for the future." A sample statement assessing a staff member's own functional area was: "My area is client-centered and responsive to user feedback." Staff members entered a response to each statement on a five point Likert scale, with 1=strongly disagree, 3=somewhat agree, and 5=strongly agree.

Library-wide Results

In the 1999 study, 114 of 125 staff members participated and 99 of 120 participated in the 2002 study, for participation rates of 91 percent and 83 percent respectively. The average score on the five point Likert scale across the eighteen library-wide questions was 3.09 on a 5 point scale in 1999 and 3.24 in 2002.

The only score in the 1999 survey greater than 4 on a 5 point scale was "delivering excellent basic services to users" (4.12). "Playing a leadership role in campus

information policy” (3.94), “being client centered and responsive to user feedback” (3.80), and “positioning the Libraries for the future” (3.76) scored higher than 3.75 in 1999.

The issues requiring the greatest attention after the 1999 survey were “staff workloads” (2.12), “organizational boundaries between the Libraries’ Areas” (2.42), and “setting reasonable expectations about what library staff could effectively accomplish” (2.47).

Between 1999 and 2002, the overall average score for the Libraries as an organization improved from 3.09 to 3.24 (a 5% increase) and the library-wide average score improved on 14 of the 18 measures of success. Significant improvements (+0.20 or more on a 5 point scale) were registered for:

- Ensuring that library staff have a shared vision of the Libraries’ future (+0.43);
- Being client centered and responsive to user feedback (+0.41);
- Being positioned for user outreach (+0.34);
- Ensuring reasonable library staff workloads (+0.34);
- Continuously seeking efficiencies and quality improvements (+0.33);
- Making the decision-making structure clear to staff (+0.31); and
- Placing accountability at appropriate levels in the organization (+0.30).

Scores for each of the performance measures, by survey year, were as follows:

<u>Performance Measure</u>	Library-wide Average <u>1999</u>	Library-wide Average <u>2002</u>
1) Positioning the Libraries for the future	3.76	3.82
2) Being client centered and responsive to user feedback	3.80	4.21
3) Delivering excellent basic services to users	4.12	4.31
4) Demonstrating appreciation and consideration for individual differences;	3.54	3.51
5) Ensuring that library staff have a shared vision of the Libraries’ future	2.83	3.26
6) Being positioned for user outreach	3.64	3.98
7) Playing a leadership role in campus information policy	3.94	3.67
8) Empowering staff with respect to operational responsibilities	2.99	2.90
9) Reflecting shared leadership and mutual respect among library staff	2.85	2.91
10) Ensuring reasonable library staff workloads	2.12	2.46
11) Setting realistic expectations as to what library staff	2.47	2.41

can accomplish effectively		
12) Minimizing organizational boundaries between the Libraries' functional areas	2.42	2.46
13) Displaying strong inter-area cooperation	2.77	2.83
14) Fostering good communications throughout the Libraries	2.67	2.77
15) Making the decision-making structure clear to staff	2.64	2.95
16) Integrating the regional campus libraries into the overall library system	2.73	2.87
17) Continuously seeking efficiencies and quality improvements	3.45	3.78
18) Placing accountability at appropriate levels in the organization	2.83	3.13
Average of all 18 Measures	3.09	3.24

The Libraries undertook a number of strategies and actions between 1999 and 2002 that may have contributed to raising scores in 2002. At the conclusion of the 1999 study, for example, the Libraries responded in the following ways to recommendations made by its organizational development consultant, Maureen Sullivan (Sullivan, 1999):

- Workflow and Workload Analyses – Each library staff member's cross-functional team assignments were reviewed by their area head with the goal of distributing assignments more equitably throughout the library. Sullivan recommended that library staff focus on work that was important to users and de-emphasize work that was not. Workflow analyses were conducted in Access Services and Collections Services.
- Team Training – “Fundamentals of Working in Teams”, a one-day workshop previously attended by library staff members, is now offered to all new staff. Copies of Senge's book, *The Fifth Discipline*, were purchased and offered to all library staff. Learning Organization workshops, conducted by consultants from the Association of Research Libraries' Office of Leadership and Management Services, were offered to all library staff and most attended. A library staff training team was charged to conduct training sessions and workshops on various topics related to working in a team-based organization.
- Staff Interaction - The Libraries engaged Shelley Phipps, an organizational development consultant affiliated with the Association of Research Libraries' Office of Leadership and Management Services. Phipps had done work at the University of Arizona Library (Phipps, 1999) on individual and team performance measurement based on Cullen's Focus/Value/Purpose Matrix (Cullen, 1997). Phipps worked with the University of Connecticut Libraries' staff on the issues of good communications, mutual respect, mental models and “ladders of inference” (Senge, 1994).

- **Reviewing Team Structures** – The Libraries Leadership Council clarified the role of team leaders and team members. The variety of roles for team leaders was reduced to either supervising or non-supervising and permanent or fixed length assignments. Responsibilities were clearly defined for each team leader role and for team members.
- **Leadership Council Leadership Development Training** – The Director attended a one-week “Core Competencies” workshop conducted by Senge’s Society for Organizational Learning (Sol). Four Leadership Council members attended the ACRL/Harvard Leadership Institute and the others were encouraged to attend.
- **Employee Recognition and Rewards** – A project team was charged to make recommendations and many of their recommendations were adopted. The Libraries annual staff appreciation ceremony was expanded and additional “awards ceremonies” have been held. In large part, staff appreciate a hand-written note from either the Director of Libraries or the director of their functional area as much as formal recognition.
- **Improving Communication Between Leadership Council and Library Staff** – Weekly Leadership Council meetings are now open for all library staff to attend. Relevant documents and agendas continue to be distributed via the Libraries intranet prior to Leadership Council meetings and minutes of meetings are posted on the intranet as well.
- **Shared Vision** – The Libraries engaged Shelley Phipps to recommend approaches for developing an updated vision statement for the library and for each functional area. A representative from each functional team was appointed to the Libraries “Vision 2005” project team after the area visions were drafted. The project team then developed a libraries-wide vision as part of an open process to ensure widespread staff acceptance.

While considerable progress was made, issues of strongest concern after the 2002 library-wide survey continued to be staff workloads and organizational boundaries between the seven functional areas. Staff workloads intensified as the University’s budget was cut in response to an economic downturn. Beginning in 2002, the Libraries instituted a library-wide annual “Day of Learning” in part to address the issue of organizational boundaries.

Functional Area Results

The average overall score for the individual functional areas improved from 3.52 in 1999 to 3.65 in 2002 (+4%) and the average score across all functional areas improved on 12 of the 15 measures of success.

<u>Performance Measure</u>	<u>Library-wide Average 1999</u>	<u>Library-wide Average 2002</u>
1) Focusing first on dedicating resources to achieve the Libraries' strategic initiatives when doing its annual planning before moving on to Area and individual goals	3.97	4.03
2) Positioning the Area for the future	3.57	3.65
3) Being client centered and responsive to user feedback;	4.00	4.15
4) Delivering excellent basic services to users	4.28	4.17
5) Demonstrating appreciation and consideration for individual differences;	3.69	3.55
6) Ensuring that Area staff have a shared vision of the Area's future	3.07	3.27
7) Being positioned for user outreach	3.54	3.66
8) Empowering staff to make decisions at an operational level	3.33	3.32
9) Holding teams accountable for their decisions and responsibilities;	3.59	3.81
10) Fostering a strong sense of shared leadership in the Area	2.93	3.20
11) Mutual respect among Area staff members and teams	3.32	3.49
12) Minimizing boundaries between Area teams and demonstrating strong cooperation among Area teams	3.40	3.72
13) Clear Area decision-making structure	3.08	3.52
14) Good communication throughout the Area	3.27	3.29
15) Continuously seeking efficiencies and quality improvements	3.72	3.85

The functional area results reveal that considerable progress was made between 1999 and 2002 on a number of organizational dynamics. Scores improved significantly (+0.20 or more on a 5 point scale) for:

- Clear Area decision-making structure (+0.44);
- Minimizing boundaries between Area teams and demonstrating strong cooperation among Area teams (+0.32);
- Fostering a strong sense of shared leadership in the area (+0.27);
- Holding teams accountable for their decisions and responsibilities (+0.22); and
- Ensuring that Area staff have a shared vision of the Area's future (+0.20)

These results are especially encouraging given the organizational development consultant's observation that it usually takes seven or more years to fully implement a new organization and to transform its work and culture (Sullivan, 1999).

Conclusions

The University of Connecticut Libraries' organizational assessment case study builds on multidimensional organizational effectiveness models developed by Kanter/Brinkerhoff, Cameron, Childers/Van House, Van House/Weil/McClure, Kaplan/Norton, and Calvert/Cullen.

The University of Connecticut Libraries' experience with organizational assessment has generally yielded positive results. The overall library user satisfaction average score increased from 3.67 to 4.04 on a 5-point Likert scale between 1997 and 2001. The Libraries scored second highest among a peer group of twelve North American research libraries in a pilot LibQual+ survey in 2001. In a web-based user survey conducted in 2002, 92 percent of the University of Connecticut student and faculty respondents indicated strong overall satisfaction with library services.

Between 1999 and 2002, the overall average score for the Libraries as an organization improved from 3.09 to 3.24 (+5%) and the library-wide average score improved on 14 of the 18 measures of success. The average overall score for the individual functional areas improved from 3.52 in 1999 to 3.65 in 2002 (+4%) and the average score across all areas improved on 12 of the 15 measures of success.

Scores for the seven functional areas' organizational effectiveness were consistently higher than scores at the library-wide level. This tends to reinforce the idea that University of Connecticut library staff members associate more strongly with their functional area than with the Libraries as an organizational entity. In part to address this, the Libraries instituted a Libraries-wide "Day of Learning" in 2002 to bring all library staff together for an entire day once a year off-campus to improve library-wide communication, collectively address topics of interest to the entire library and to increase staff members' awareness of the other six functional areas besides their own.

Building on a Culture of Assessment described by Lakos and Phipps, the University of Connecticut Libraries expect to begin using a Statistical Data Information System (SDIS) in 2003, making key output measures available to all library staff using simple, menu-driven queries. The Libraries also plan to re-institute LibQual+ surveying in the Spring of 2004. Longer term, the University of Connecticut Libraries plans to conduct a campus-wide user survey and re-administer the staff organizational assessment survey in 2005.

Given the budget cuts and reduction in staff size experienced by the University of Connecticut Libraries since 2001, the Libraries ongoing multidimensional assessment activities will be an opportunity for the Libraries to test Cameron and Smart's recent

study of 334 colleges and universities that found institutions with declining resources were as effective as institutions with abundant resources if they avoided twelve dysfunctional negative attributes (Cameron and Smart, 1998).

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