

(Effectively) Involving Staff in Planning Digital Services



- Staff buy in, and expertise, is crucial to the **success** of digital and "real" libraries.
- Traditional methods of involving staff fail.
 - Staff feel left out
 - Same old, same old
- Disconnect staff/user comments and management actions



Used when... at

- Merger:
 - Information Service, Univ. Science Library:
Gerstein Science Information Centre, U of T
- Strategic Review
 - Library Assoc IT Division: OLITA
- Start up, pilot, ongoing:
 - Institutional Repository: T-Space, U of T



Used when

- Merger
- Strategic planning
- Start up, pilot and beyond



Why

- Non technical factors biggest cause of “failure”
- Systematically tie “follow up” actions to constituents concerns
- Move forward
 - not the same old circular discussions



Combination of

- Active learning technique
 - Read, write, consult
- Meeting management
- Qualitative research methods
 - Open ended interviews and questionnaires
 - Focus groups
 - Qualitative analysis



Response to concerns

- Will do: with timeline
- Refer: action required by another body/ person
- Resources
 - preclude but will try and find a way
- Have some concerns
 - discuss



Lightly structure questionnaires

- A few open ended questions
 - What does xx do best, could do better..
 - What should we stop, start, continue doing?
 - Random thoughts



Meeting management

- Discussion after questionnaire completion
- (Troublesome?) someone take notes
- Facilitated by a knowledgeable outsider
- Create small(er) groups
- Keep careful track of time
- 1 comment per person per issue: more if time allows
- Only one person speaks at a time
- 3 positive to 1 negative
- Leftovers



Iterative analysis

- Read, read again
- Identify max 15 themes – phrases, incidents, types or behaviors
- Color code
- Chart individual themes
- Summarize responses: 1 to 2 pages
- Look at interrelations
- Deal with leftovers
- Check for how data could have been misinterpreted
- Check the literature
- Redo summary and analysis



Review with participants

- Send ahead of time
- Ask for written and verbal feedback on
 - Accuracy
 - Further thoughts
- Re - summarize



Read write consult

- Read text, questions, quotes
- Write comments privately
- Share (consult) responses with 1 person
- Open discussion



Responsibility panic

- Identify easy to do
- Get buy in from the powers that be
- Preliminary priorities
- Report back and gather additional input every 6 months to a year.



IR: Interviews, document review and rapid planning cycles

- 3 open ended private face to face interviews w/ early adopters and influentials in 1st 18 months
- Contact every 2 to 3 months
- Email and calendar review every 3 months
- Really **LISTEN** and **REFLECT**: ½ day
- Mini planning cycles



Open Ended Interviews

- A few areas to probe
- “Thick responses”
 - Not closed yes/no questions
 - Mostly probing
 - Respondent speaks 80% of the time
- Interviewer “owns” biases
 - but tries not to influence respondent



Key respondent interviews

- 10 face to face library staff
- Purposeful and diverse sample
- Private vs. retreat
- 3 areas
 - Deployment
 - Integration w/ library staff
 - governance



Results facilitate continued process

- Project Update or status report (w/ quantitative data)
- 2 page interview summary
- Questionnaire with a few more ?s:
- What comment(s)
 - most surprised you and why?
 - do you most disagree with and why?
 - spoke most directly to you?
- This reminds of me xxx (describe project, service etc.)
 - The most valuable and applicable lesson learnt was...



Follow up

- Open but managed discussion
- Analysis
- Verify
- Action Plan
- Iterative process and Status report



Interviews not applicable/available?

- Use **quotes** or **statistics** to foster discussion and/or questionnaire design and completion



How to do it better

- Well informed outsider
- Team approach
- If not possible check your own biases
 - Fill out the questionnaires
 - Repeated write why, why now, what you hope to find out, what you will resist etc.



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