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# Achieving Staff Buy-In

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A Collaborative Approach for Workflow Analysis

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## About University of Vermont

- 12,856 students (2014)
  - Land-grant public university with two libraries
    - the Bailey/Howe Library and the Dana Medical Library
  - The libraries serve different patron groups and have distinct work cultures
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## Three immediate challenges led to the project.

1. Loss of technical services staff, both librarians and support staff
  2. The increasing complexity of electronic resources management had created “logjams” in workflows.
  3. An earlier, incomplete merger of the technical services functions between libraries had contributed to confusion and a certain level of distrust between the libraries.
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# The Charge

February 2014

“Understand and evaluate acquisitions and resource description processes across university libraries.”

Focus on:

- all formats and categories of information resources
- throughout the lifecycle: ordering, providing access, on-going maintenance, and tracking of statistics

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--Dean of Libraries

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# Understand

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## Cross-library task force formed and qualitative research methods developed

Literature review for best practices in Technical Services and  
“mapped” existing workflows

Group interviews with each staff member

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## Preliminary Report

June 2014

Synthesis of interviews

Broad themes: Communication, Training, Collaboration,  
Personnel Shortages, Stress/Anxiety/Isolation, Lack of  
Project Management Skills

Narrow themes: Cataloging QC, Hidden Collections, Lack of  
Space, Print Serials Check-in, Metrics, ERM, Outdated  
Position Descriptions, Gridlocked Procedures

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## Preliminary Report

June 2014

### Recommendations

- Hire a serials/e-resources librarian
  - Hire a collection development librarian
  - Hold regular, structured meetings
  - Update position descriptions
  - Project management training and incentives
  - Outsource
  - Resolve inefficiencies and gridlock
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# The Charge, part 2

July 2014

Dean thanked us for the report and sent us back to come up with additional, more focused, recommendations

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## The Task Force sought additional, more specific recommendations

- Shared the report with all concerned
- Held focus groups with technical services staff
- Conducted a survey throughout the libraries

# Organize

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## Survey responses were grouped into categories

- Collection Development and Management
- Project Management
- Electronic Resources
- Cataloging
- Serials

Top priorities for each category were also identified

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## “Town Hall” Meetings

“Town Hall” Meetings were held to discuss and address the resulting issues and/or areas ranked as highest priority in the surveys.

Additional follow-up meetings were held with functional units to discuss concerns not ranked as top issues.

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## Final Report

May 2015

### High Priority Recommendations

- Clarify lines of responsibility between Dana and B/H
  - Ensure that knowledge of procedures and practices is not lost when an employee leaves
  - Create needed documentation, organize it, and store it in an accessible place
  - Increase functionality of the electronic resources management system
  - Improve quality of MARC bulk record loads in the catalog
  - Complete renewals workflows in a timely fashion
  - More...
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# Challenges Addressed!

1. Hired two librarians and increased involvement from paraprofessionals at Dana Medical Library.
  2. Logjams dislodged: ERM moved to new platform, workflows revised
  3. Increased clarity around responsibilities and collaboration between employees
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# Broader Lessons Learned

- The value of being flexible about the process!
  - The qualitative research approach and triangulation of methods resulted in a more complete understanding of the issues
  - Checking in with the staff regularly throughout the process led to improved workflows and better communication.
  - Transparency and inclusiveness were essential to any progress
  - No magic bullets, but slow and steady improvement
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# Thanks!

Any questions?

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