

Jumpstart

Project management techniques to finally finish a LibGuides update

St. John Fisher University is the home of Lavery Library, the only library on the campus of a small doctoral-granting institution in Rochester, New York. Over the past couple of years, the three authors have formed a coalition for updating LibGuides in a participatory way. During the summer of 2022, we led a project to reorganize our library's LibGuides homepage, the index of our guides.

How it started

Back in 2019, all we had started talking about improving usability for our LibGuides homepage. We wanted to make it easier for users to find guides. We knew we would have to change the way the guides were categorized on the page. But, without clear goals and direction, we soon lost momentum. In September 2021, Christina Hillman came to Ben Hockenberry and Mia Bretkopf, proposing we revisit the conversation. We decided to name Christina as project manager and restart this stalled effort. The three of us designed a two-phased project to define new LibGuides subject categories.

In the first phase, we threw out all our old LibGuides subjects, which had included broad categories like health sciences (for our nursing and pharmacy guides) and humanities (arts, English, and other guides). On LibGuides homepages, users view guides organized by subject. To make our homepage easier to browse, we made a list of the majors, minors, and graduate programs and created a subject for each. Users would now be able to skim the page for their academic program of study to find the corresponding LibGuides. For example, they could now see our English guide without first having to select humanities (see figure 1).

In the second phase, we facilitated a participatory card sort activity to categorize all the leftover guides. This leftover group covered varied topics, from information literacy tutorials to information for alumni, and a guide to interlibrary loan. We opened this card sort to all library staff, inviting them to sort these guides into new metaphorical "buckets." We also asked them to label each bucket with a name that would make sense to our users.

This participatory card sort phase was a success. About half of our total staff chose to participate, and it was a good mix of librarians and non-librarians. They were able to complete the card sort on their own time during a period of about three weeks. Then, our three-person coalition examined their suggested bucket groupings and labels. We were able to create a proposal for the new set of subjects and the guides that would fall within each. We held a

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meeting with the small group to share our proposal, and we used collaborative decision-making to finalize subject labels.

What follows is a conversation between the three of us who led the project. We came up with a few questions that would elicit reflection on how we used project management techniques to move a stalled project forward.

What were some of the challenges we encountered with this project?

Ben Hockenberry (BH): The major challenge for any project that impacts a whole staff population is making sure every stakeholder feels their positions are respected. Ideally, everyone's voices would be heard in person. However, scheduling meetings that allow for all LibGuides-creating staff to attend is problematic, particularly when so many library projects have to occur during time between semesters! So we had to look at alternate means to secure buy-in from the whole staff.

Christina Hillman (CH): A big challenge was the timeline we gave ourselves to complete the update. As Ben mentioned, projects like this are ideally completed between academic semesters, and we wanted to "go live" before classes started in September 2022. We started the first phase of this project in March 2022, and began phase two in June 2022. This was a compressed timeline when we considered summer break, vacations, liaison work for librarians. Getting the staff together was going to be problematic. Ben, Mia, and I worked with tight deadlines, and actively shared those deadlines with staff who participated in the card sort activity, in order to complete the project on time.

BH: Yes, changes needed to be made well before the start of a semester to allow time to update videos, screenshots, and other learning objects.

CH: Ben also mentioned staff buy-in was a challenge, and I agree. There were competing feelings, priorities, and values around homepage organization. Over the years, as LibGuides had grown organically, there had not been a lot of oversight and shared understanding about how to apply subject labels for organization. The lack of shared understanding led to internal issues, which we handled as one-off cases, and this didn't lead to any long-term or systemic changes.

For me, personally and professionally, I was concerned about building trust—trust that Ben, Mia, and I would make good decisions and trust that the three of us could speak freely and feel like our opinions and values were respected during the process.

Mia Breitkopf (MB): I am the newest librarian on our staff, and I immediately noticed that Christina and Ben didn't think the three of us should make big LibGuides homepage changes without including the other library staff in decision-making. I really appreciated that

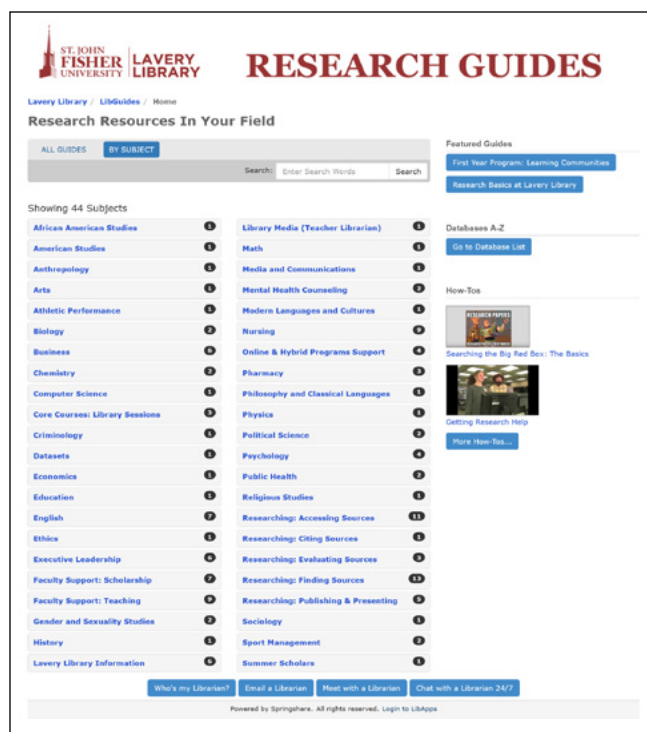


Figure 1. "Research Guides," Lavery Library, St. John Fisher University, <https://libguides.sjfc.edu/>.

inclusiveness. I could see that approach was an important part of the organizational culture. We recognized that it would be challenging to include everyone, so the three of us talked a lot about how to invite the rest of the staff into the discussion, knowing not everyone would have the time or the interest.

What techniques did we use to address those challenges?

CH: Creating our three-person coalition over the last two or three years has helped to build a sense of trust around changes we have proposed, beyond this homepage reorganization project. As Ben mentioned in a meeting, when the three of us work together we can lend not only our shared expertise to LibGuides, but also a sense of authority and good decision making because one person isn't dictating best practices or deciding which changes are necessary. This little coalition we've built also helped us to encourage each other to make executive decisions during the card sort. Basically, it allowed us to move through the process more quickly as a full team.

MB: Yes. We realized that if we brought everyone's card sort ideas to the small group meeting, decision-making would stretch our timeline way past summer. Like Christina said, we made those decisions for some subject labels and groupings and brought those recommendations to the small group. They were happy with that. It let us use our meeting time to discuss a few subjects for which people had proposed very different labels.

BH: The three of us met to plan the meeting with the card sort meeting for the small group. In our pre-meeting, we established norms for communication.

CH: During the final meeting with the card sort group, we also all agreed to a set of norms, as you put it, Ben. These were guiding principles for the meeting—this helped us to collaborate and make decisions more quickly, while making sure to respect individual contributors. I was the facilitator for this final meeting and I think that having a single person lead the meeting, but with the shared voice of all three of us, helped to keep our timelines.

MB: The guiding principles included things like "Participate fully and honestly," "Raise your hand if you want to speak and the facilitator will call on you," and "Strive for consensus." It helped build trust and helped us keep a quick pace. It set an important tone that helped us accomplish a lot in one meeting.

CH: The coolest thing we were able to do was bring in non-librarian staff, who have little skin in the game for LibGuide subject organization, because it allowed fresh eyes!

MB: I agree! In order to make it easy for these staff to participate, we spent a lot of time talking about how to phrase things, how to time meetings and communications so they felt relevant and useful. We also used multiple communication channels. And Christina created formal project documentation that we disseminated to staff.

How did it go? Are there other projects this process could be useful for?

BH: I've been happy to have a core team working on LibGuides projects. This enables us to consider options and other perspectives, avoiding the tunnel vision of one individual, but avoiding the paralysis that comes with a large committee making decisions. Using a group buy-in-building method to set expectations for guide authors will pay dividends for content standardization and ease of navigability. The tactics we used to amplify important stakeholders' voices while encouraging multiple perspectives will be useful in the future for

approaching how to deliver library services in new modalities—particularly as the library is approaching a building closure for renovation. We'll have to try a lot of new things in order to meet user needs.

CH: Things went way better than I expected! Decision-making with lots of stakeholders is hard, and especially hard when there are competing priorities and values. Something I keep telling myself is that we made these updates without input from our end-users (the students), so as we begin to see how they understand and access LibGuides, we will likely make updates to the subject category names. I think this probably helped a lot of folks as we moved through the final meeting and compromised on word choice or location of guides.

MB: LibGuides upkeep is hard. Really hard, especially in a library like ours, with a dozen people creating content. I think our approach was effective. It took a fair amount of planning to make it participatory, but I agree with Ben that it pays off in the long run. We wanted to establish trust so we can make other big updates to LibGuides.

CH: I can see a similar process working for other projects. In fact, the librarians used a similar process while rewriting our library's information literacy learning outcomes during the summer of 2018.

BH: I could see a stylistic overhaul of LibGuides in the near future, perhaps with focus on author profile boxes and pages!

MB: I'm imagining the three of us as a LibGuides project management team. We could rotate leadership for future projects. I can see this becoming an annual thing, where we choose a discrete LibGuides update project each summer. One of us three would step forward as project manager and guide the staff through.

BH: I'd say that this sort of process will help build that trust, but there does need to be some meeting of minds between the core group or nothing will come together. A small project with a clear end point is a great opportunity to work on that culture.

CH: This is so accurate, Ben. I like how you mention the core group, and how they are important for getting the work to come together—this core group can start to create the culture for the larger projects by building trust and respect in small ways, especially when there are clear and goals set.

MB: Right, we had already spent a lot of time in meetings with norms and clear goals. We had already built up that muscle.

CH: We understand that what we did won't work at all institutions. But hopefully some of the techniques we used will be helpful, and inspire others. ¶¶