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We’re All In This Together. Using Systems Thinking and Data Visualization to Influence the Ordering Habits of Liaisons

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**WE’RE ALL IN THIS TOGETHER!**

**Using Systems Thinking and Data Visualization to Influence the Ordering Habits of Liaisons**

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**THE PROBLEM**

- 22 liaisons responsible for selecting print monographs and e-books for 42 funds/academic disciplines
- Selection is a secondary responsibility for most
- Liaisons are requested to stop ordering two months before end of fiscal year
- Inconsistent attention to scholarly publishing cycle can lead to rushed collection decision-making (“meet the deadline” instead of “meet the needs of the department”)
- “I’ll get to it later” leads to deluge of orders in March; creates backlog in acquisitions, cataloging, and collection management

**WHAT HAPPENS AFTER YOU HIT “SELECT?”**

(Multiply x 14,000)

- **SELECT** (liaisons)
  - Chan checks each order
  - Uploads temp records
  - Orders need review / work (Walt, Pete)

- **ORDER**
  - CHAN: checks each order
  - Exports cart in GOBI
  - Uploads temp records

- **RECEIVE**
  - ANGIE & ACD STUDENTS
  - Books arrive
  - Unpacked & sorted

- **CATALOGING**
  - ERIK: reviews carts
  - Records need review / work (Walt, Pete)

- **COLLECTIONS MANAGEMENT**
  - ERIK: ID records for cataloging
  - Records need review / work (Walt, Pete)

- **PromptCat**
  - JASON: bib records loaded
  - ERIK: ID records for cataloging

**SYSTEMS THINKING**

“Systems thinking is a language that provides a method for communication about dynamic complexities and interdependencies.”


“...Systems thinking is a discipline for seeing wholes, recognizing patterns and interrelationships, and learning how to structure those interrelationships in more effective, efficient ways.”


Most of our liaisons do not work in technical services; systems thinking provides a framework to talk about the connectivity between the seemingly minor act of selecting a single book and the colleagues and work-flows that kick into place after that action.

**RESULTS**

- Deadlines are effective at increasing ordering in Fall semester; but only a slight reduction in spring backlog.

- Sustained commitment to collection development throughout the academic year.

- Excerpt from presentation to liaisons to connect ordering to technical services workflows using systems thinking. This was introduced along with three new annual ordering targets, and an invitation to all work together to reduce the congestion that results from procrastinating on selecting books.

  - September 15: 33% of firm order funds spent
  - December 15: 66% of firm order funds spent
  - March 15: 100% / stop ordering

- **LESIONS LEARNED**
  - Systems thinking provides a useful framework through which to introduce and engage our liaisons - all of whom operate independently in this role - in collectively taking responsibility to solve an institutional problem
  - Visualizations provide a useful way to quickly tell a story
  - Reminders help, and reports with spending targets are hugely appreciated by our liaisons
  - It’s important to make the often “invisible” work of technical services visible to our colleagues and community
  - This work is never over; constant need to on-board new liaisons, we need to take other factors in the system (librarian workload? changes in approval plan?) into account when looking at individual liaison ordering patterns and behavior, particularly for large funds

**“DEADLINES,” REPORTS, & REMINDERS**

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**TABLEAU VISUALIZATION**

Individual fund expenditures: Fund Area X FY2016-2018