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

Jamie Hazlitt | William H. Hannon Library | Loyola Marymount University

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)
- new standing orders
- replacements
- faculty requests

ORDER
- CHAN checks each order
- books arrive
- unpacked & sorted

RECEIVE
- ANHE & ACD STUDENTS
- faculty requests

CATALOGING
- ERIK creates records
- records need review / work (Walt, Fenn)

COLLECTIONS MANAGEMENT
- Rose, Chamero, George
- PromptCat

CATA LOGING
- ID records for cataloging
- ID records for cataloging

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RESULTS
- Total Liaison Firm Orders by Month - FY 15 to FY 18
- Deadlines are effective at increasing ordering in Fall semester; but only a slight reduction in spring backlog.

SYSTEMS THINKING

“Systems thinking is a language that provides a method for communicating 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.

“DEADLINES,” REPORTS, & REMINDERS
- 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 onboard 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