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

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Recommended Citation
Hazlitt, J. (2016, December). We're All In This Together. Using Systems Thinking and Data Visualization to Influence the Ordering Habits of Liaisons. Poster presented at Library Assessment Conference, Houston, TX.
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)
- CHAN checks each order
- exports cart in GOBI
- uploads temp records

ORDER
- CHAN sets order
- faculty requests
- new standing orders
- replacements

RECEIVE
- ANGE & ACD STUDENTS
- books arrive
- unpacked & sorted
- ERIK reviews carts

CATALOGING
- ERIK reviews carts
- records need review / work

COLLECTIONS MANAGEMENT
- Rose, Chamero, George

RESULTS
- Deadlines are effective at increasing ordering in Fall semester; but only a slight reduction in spring backlog
- Individual fund expenditures: Fund Area X FY2016-2018

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 “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.

LEONARD CHASE
Viz shows this work across multiple fiscal years.

Excerpt from presentation to liaisons to connect ordering to technical services work-flows 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

“Fort GOBI” Excerpt from presentation to liaisons to connect ordering to technical services work-flows 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.

Individual reports can be used as a tool to demonstrate sustained commitment to collection development throughout the academic year.

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