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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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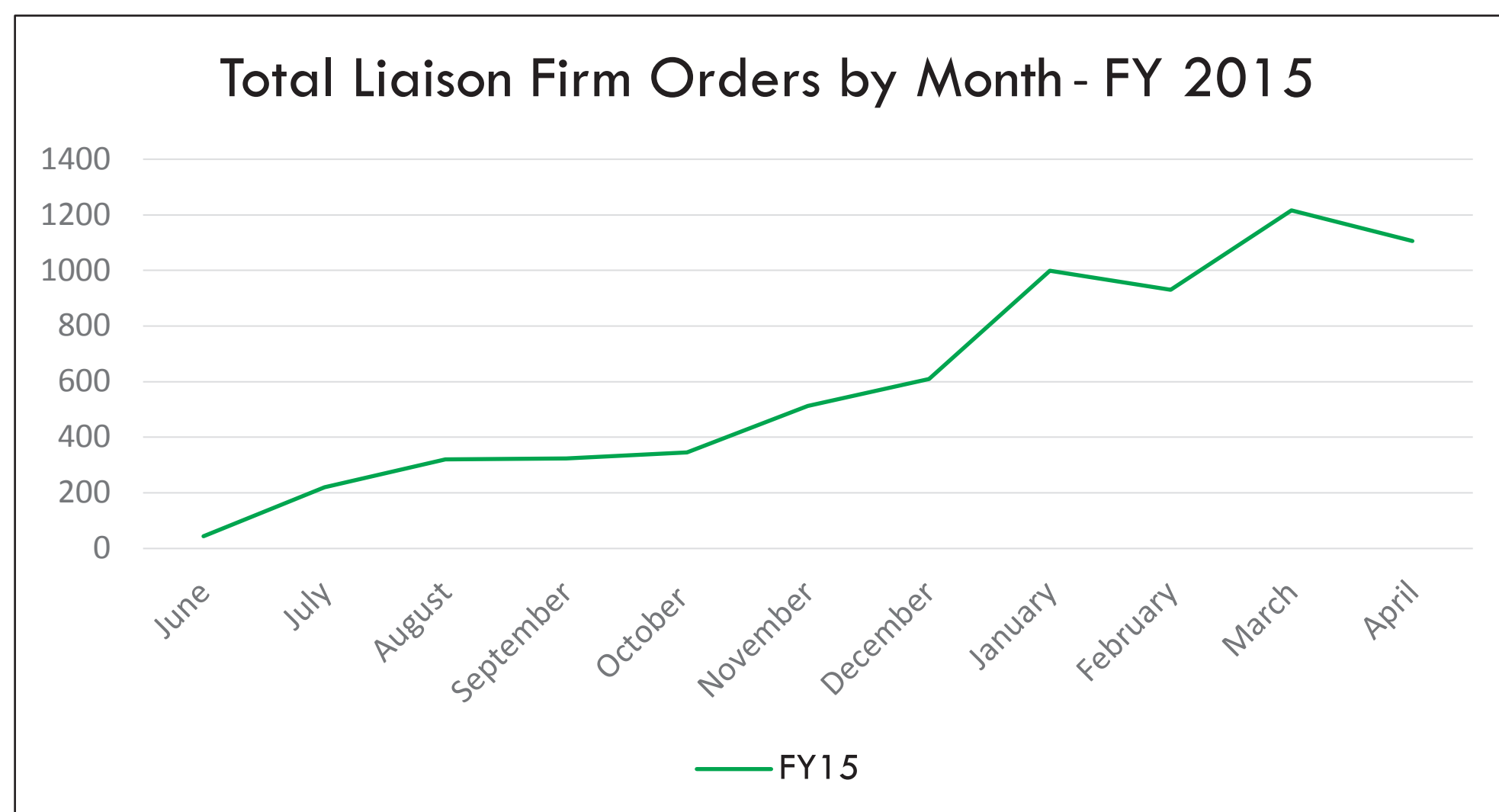
WE'RE ALL IN THIS TOGETHER!

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

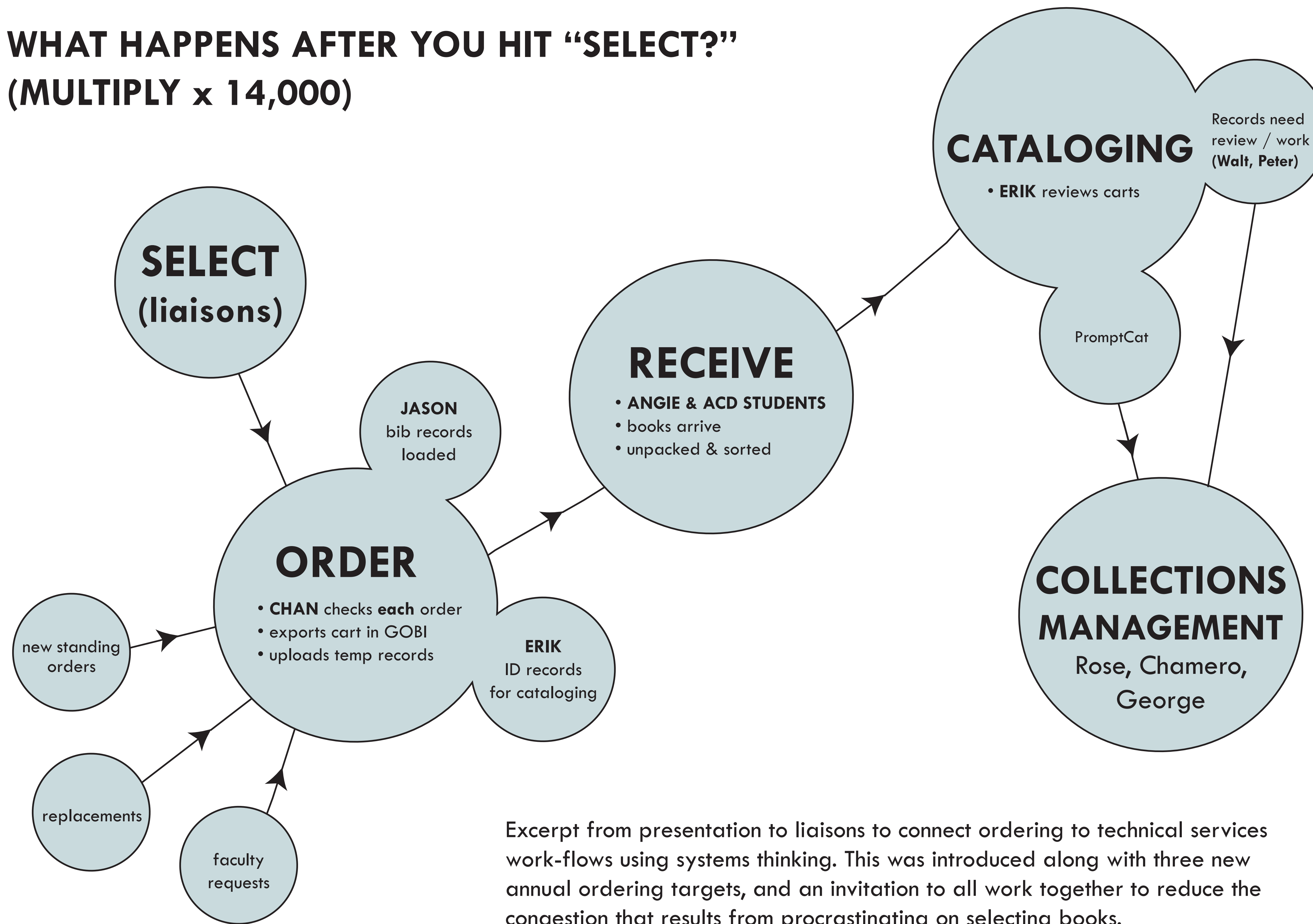
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THE PROBLEM

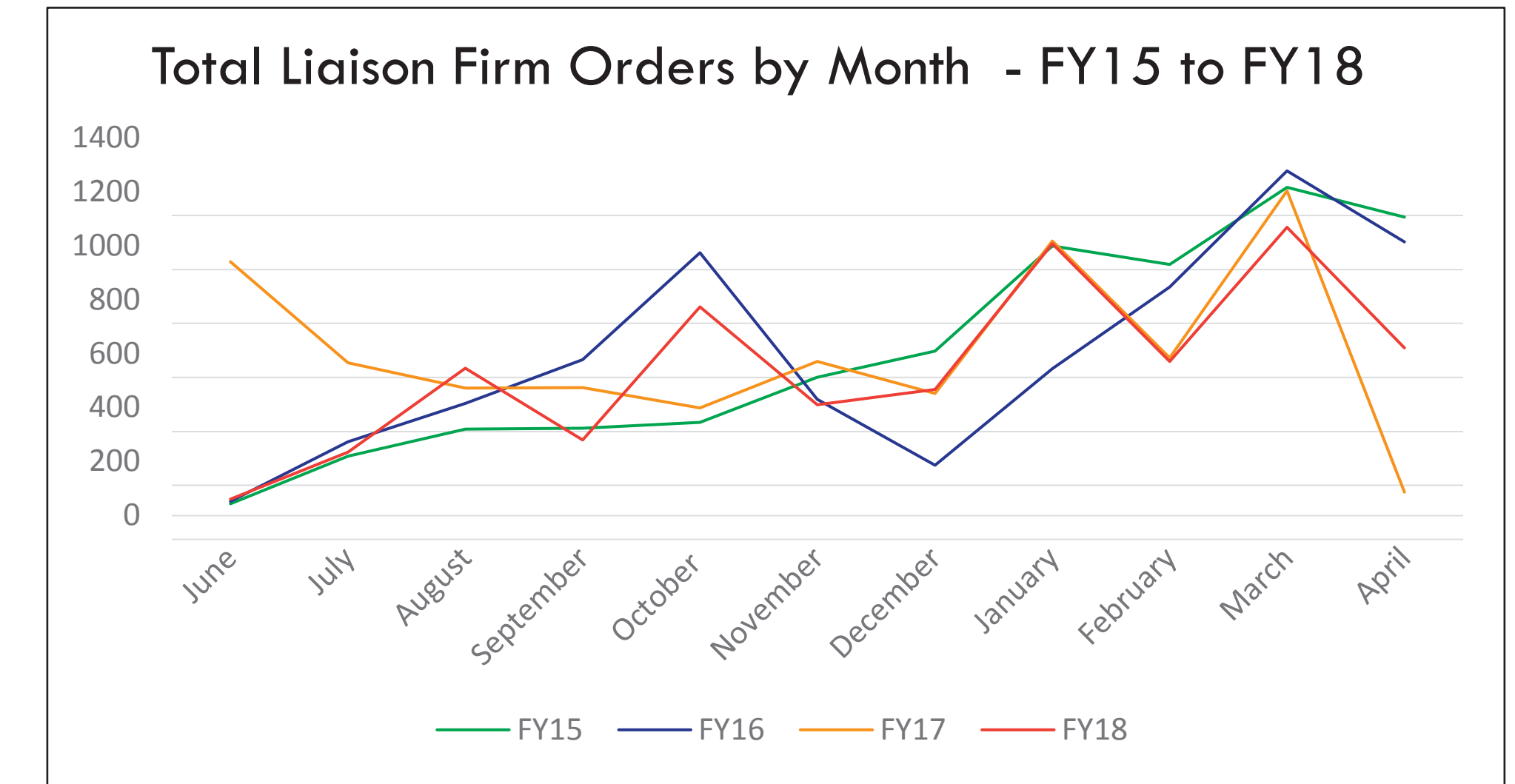
- **22** liaisons responsible for selecting print monographs and e-books for **42** funds/academic disciplines
- Selection is a secondary responsibility for most
- Liaisons are requested to stop ordering two months before end of fiscal year
- Inconsistent attention to scholarly publishing cycle can lead 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



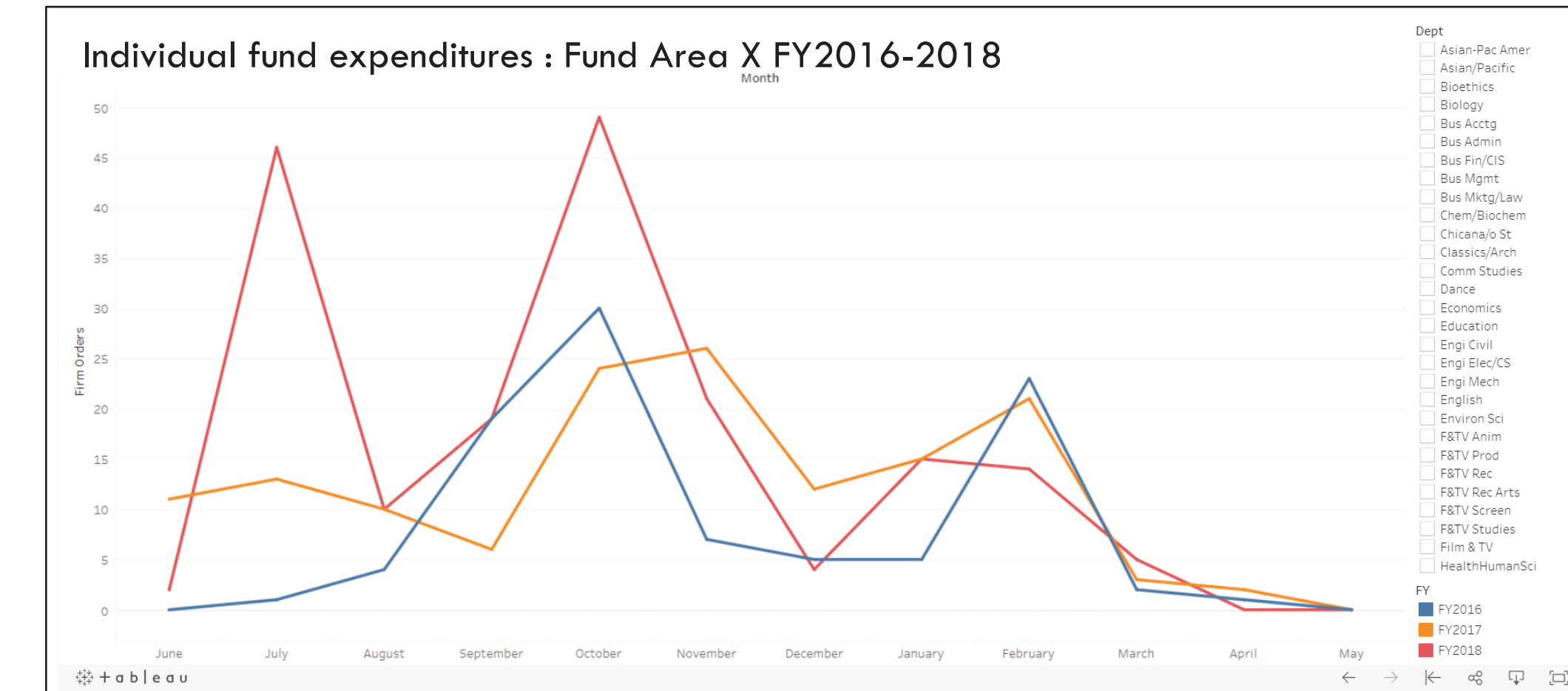
WHAT HAPPENS AFTER YOU HIT “SELECT?” (MULTIPLY x 14,000)



RESULTS



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



Screengrab from Tableau viz shared with liaisons. Individual reports can be used as a tool to demonstrate sustained commitment to collection development throughout the academic year.

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

LESSONS 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



“Fort GOBI”

SYSTEMS THINKING

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

Anderson, V., & Johnson, L. (1997). Systems Thinking Basics. From Concepts to Causal Loops. Waltham, Mass: Pegasus Comm., Inc.

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

Senge, P., & Lannon-Kim, C. (1991). The Systems Thinking Approach. The Systems Thinker Newsletter, Vol. 2, Cambridge, MA: Kendall Square.

- 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

Fund reports / FY19 YTD / Report run September 5, 2018					
	APPROPRIATION	EXPENDITURE	ENCUMBRANCE	Free Balance	
FUND AREA X – Print (XSB)	\$9,500.00	\$2,551.65	\$281.03	\$6,667.32	
By Subfund					
FIRM ORDER		\$1,634.68			
AUTO-SHIP		\$916.97			
STAND ORDER		\$0.00			
FUND AREA X – Capital Ebook (XSSEC)	\$2,500.00	\$1,519.99			
By Subfund					
FIRM ORDER		\$1,519.99			
DDA		\$0.00			
Total	\$12,000.00	\$4,071.64	\$281.03	\$7,647.33	36.27%
Estimated appropriation for firm orders for FY19*		\$7,602.00			
Recommended expenditure on firm orders by 9/15/18:		\$1,614.86			

This liaison is on track to expend her funds evenly throughout the academic year. Viz shows this work across multiple fiscal years.

Fund reports / FY19 YTD / Report run November 27, 2018					
	APPROPRIATION	EXPENDITURE	ENCUMBRANCE	Free Balance	
FUND AREA X – Print (XSB)	\$9,500.00	\$4,305.34	\$949.84	\$4,244.82	
By Subfund					
FIRM ORDER		\$2,490.22			
AUTO-SHIP		\$1,815.12			
STAND ORDER		\$0.00			
FUND AREA X – Capital Ebook (XSSEC)	\$2,500.00	\$2,165.74	\$0.00	\$334.26	
By Subfund					
FIRM ORDER		\$2,165.74			
DDA		\$0.00			
Total	\$12,000.00	\$6,471.08	\$949.84	\$4,579.08	61.84%
Estimated appropriation for firm orders for FY19*		\$7,602.00			
Recommended expenditure on firm orders by 12/15/18:		\$1,450.42			

*Based on percentage of XSB fund expended on auto-ship/standing order in FY18: 36.65%

FY17 autoship percentage: 56.42%