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MAKING A VIRTUE OUT OF VIRTUAL COMMUNITIES: WORKING ELECTRONICALLY WITH AN ADVISORY PANEL OF LIBRARY USERS

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Aims

All libraries need an effective process of governance to guide the planning, development and improvement of resources and services. Library committees may be expected to relate both to the high-level strategic policies and vision of their parent organizations and to the day-to-day needs and problems of their users. Combining these requirements in a single library committee can lead to difficulties for three reasons: it may be hard finding members who are equally well qualified to give advice on both strategic and day-to-day questions; the most useful committee members are often also the busiest and therefore those most likely to miss meetings; and in a multi-disciplinary library, a committee that is truly representative by including members drawn from all the various user groups will be far too large to function efficiently.

Cambridge University Medical Library (a branch of Cambridge University Library) is located at Addenbrooke's Hospital, a large teaching hospital, on a site that also hosts a major group of biomedical research laboratories. The library thus serves three distinct but inter-related main stakeholder organizations - university medical school, teaching hospital, and research laboratories - and a number of other smaller client groups, all of which have overlapping interests in education, research, and clinical practice.

In recent years the library's governance structure has encountered all the problems described above. In response we decided to adopt a different, bipartite approach: we created a separate small policy advisory group consisting of high-level representatives of our major stakeholder organizations; and we addressed the day-to-day service issues by forming a User Advisory Panel (UAP) that would rely almost exclusively on electronic communication. The Panel was intended to allow the library's management to hold regular informal two-way discussions with a virtual group drawn from a broad cross-section of users (and possibly also of potential users), seeking their views on a wide variety of issues, both urgent and longer-term. It was our hope that such a format would permit quick and carefully focused consultation as and when necessary, while enabling Panel members to contribute as much or as little as their enthusiasm and other commitments permitted.

1

Methods

The Invitation

In mid-2007 we announced our intention to set up a UAP and invited volunteers to let us know of their interest in becoming members of the Panel. The invitation was emailed to all registered library users for whom we had a valid email address (about 6,700 [87%] out of a total of 7,700 users), and publicised through the library website and its RSS feed. We also contacted those registered locally for authenticated use of a national online journal service, as people who might not be registered with the library but who had demonstrated an interest in information services.

The text was more than just a simple invitation. To illustrate the range of potential topics for discussion - and thus to stimulate interest from those willing and able to think constructively about the library's functions and services - it summarised the fundamental changes taking place in the way libraries serve users, raising questions about issues such as:
- migration from print to electronic
- training programmes
- support for off-site users
- library opening hours
- channels of communication.

The invitation stressed that we were keen to see the Panel include as broad a cross-section of users and potential users as possible: in other words, we wanted volunteers from as many as possible of the client groups we served (especially from higher education, National Health Service, and biomedical research); and from as many different levels as possible within each organization (students, newly-qualified staff, and senior professionals alike).

Volunteers were not expected to act as formal representatives speaking on behalf of a particular group, though we acknowledged that anyone who wanted to consult with colleagues before replying to any of our questions would be welcome to do so; but in general we asked only that they should be willing to share their personal opinions with us. We also expressed the hope that they might sometimes initiate discussions themselves rather than waiting for the library to pose a question.

We also made it clear that the Panel's defining characteristic was to operate as a *virtual* body. While we did not rule out the possibility of very occasional meetings, we gave an undertaking that communication would usually be by email or post. other direct means. We envisaged that we might seek the Panel's views on matters ranging from simple operational practices through to more wide-ranging and philosophical discussions. We did not expect the Panel to be a decision-making body, but rather a group whose opinions would guide us in reaching our own management decisions: the inclusion of the word "Advisory" in the Panel's name was included specifically to emphasise this point.

Respondents to the invitation were asked to complete a short questionnaire providing basic information about themselves, and were also given the option of telling us more about their special library interests or concerns. We had decided in advance that the precise size and format of the Panel would depend on the response to the invitation, and that we might therefore not be able to offer all volunteers a place if the number of applications exceeded

our requirements (which included the need to ensure that the Panel's eventual membership provided, as far as possible, a balanced reflection of our actual registered client base.)

Launching the Panel

The initial invitation (which was reissued after about three weeks) ran for six weeks to the end of October 2008, by which time we had 46 confirmed volunteers. We then organized a launch party, an informal reception at the end of the working day, early in January 2008 to which all the volunteers were invited. This was simply an opportunity for us and our new Panel members to get to know one another, help to build a sense of team activity, and break down some of the social barriers that might inhibit discussion in a virtual environment. Those who were unable to attend were reassured that they would not be missing any serious discussion.

The Panel in Operation

When the Panel was planned we gave no indication as to how often we might wish to contact its members, preferring that the frequency of consultation should be determined naturally as and when the need arose. Since it was launched, we have consulted the Panel four times during its first four months of existence.

The brief personal data we asked volunteers to supply was partly intended to enable us, should the need arise, to direct our questions to selected subsets of the overall Panel membership who shared a specific interest or were in other ways particularly well qualified to provide opinions on a given topic. However, on each occasion so far, the topics chosen for discussion have been of general interest, and each consultation has therefore taken the form of an email from the library sent to all the Panel members simultaneously.

The four questions to date have cover a wide range of topics:
- Q.1 - we were about to embark on a major consultation programme with all our readers, seeking their views on our plans to dispose of some printed journals, so we asked the Panel to review and comment in advance on the proposed consultative process - principally a web-based questionnaire - and associated documentation.
- Q.2 - we asked whether the library should close on Easter Saturday (a practice we had adopted temporarily for the first time the previous year).
- Q.3 - we asked how the Panel thought we should conduct a comprehensive stock check, proposing some possible options such as closing completely for a week, or a number of less drastic but more complex alternatives.
- Q.4 - we listed a range of social networking technologies (FaceBook, MySpace, and so on) and asked for the Panel's views on whether - and how - we should be utilising any of these to develop innovative forms of communication with our users.

For the two most recent the discussions were regarded as being more open-ended and no deadline for responses was given. However, for the first two questions we stipulated a date by which we wished to receive responses; and for each of those two questions we subsequently emailed the Panel (including members who had not responded to the question) to provide our own feedback, summarising the responses and the actions we had taken as a result.

Results

The Volunteers

We received 48 initial replies to our invitation. Two of these subsequently withdrew (one because he felt his motivation for taking part was confined to a single issue and not sufficiently broad-based to make him a useful contributor; the other decided to refer the invitation to colleagues), leaving us with 46 volunteers.

8 (17%) of the volunteers simply supplied us with the basic personal data we had requested. The other 38 (83%) took the opportunity to summarise their interests and concerns. One issue in particular - e-journals - dominated their comments across all categories and grades of volunteers, with 26 stating that this was a primary concern. Several mentioned that they were in a position to represent a group of colleagues if the need arose rather than acting solely as individuals.

We already knew how our 7,700 registered users were distributed in their affiliation to the different parent organizations we served. If the Panel was to be a reliable indicator of our users' likely views, it was important that it should broadly reflect these distributions. Table I shows how these two measures of affiliation compared.

Organization	*% of all registered users*	*% of Panel members*
Cambridge University	35%	22%
National Health Service - main teaching hospital	55%	61%
National Health Service - other regional institutions	7%	11%
Medical Research Council laboratories	2%	1%
Other users	1%	2%

Table I: Distribution of registered library users and Panel members by primary affiliation

This analysis suggests that the views of University users were proportionately under-represented in the Panel. However, some of our users also have a secondary affiliation (for example, a senior hospital doctor may also be a university lecturer). Four of our hospital-based volunteers had secondary contracts with the University and were thus in a position to strengthen input from the latter point of view when appropriate, enabling us to view the Panel as being broadly representative of our users.

The Panel's Responses

The response rates to our questions have ranged between 28% and 57% of the total Panel (Table II).

	Q.1	Q.2	Q.3	Q.4
Total responses (% of Panel)	17 (37%)	26 (57%)	14 (30%)	13 (28%)

Table II: Total responses to each question.

There were also fluctuations in the response rates measured by the primary affiliation of each respondent (Table III).

Primary affiliation - % of responses	No. and % of responses to each question			
	Q.1	Q.2	Q.3	Q.4
University	4 (23%)	4 (15%)	4 (29%)	2 (15%)
NHS - hospital	9 (53%)	16 (61%)	7 (50%)	8 (62%)
NHS - other	2 (12%)	3 (12%)	2 (14%)	2 (15%)
MRC	1 (6%)	1 (4%)	0	0
Other	1 (6%)	2 (8%)	1 (7%)	1 (8%)

Table III: Response rates to each question by primary affiliation of respondent.

From the outset we made it clear that the Panel members were under no obligation to respond every time we posed a question. If they were too busy, or felt that they had no useful opinion to offer on the subject, they were free to ignore the question. As a result, 7 members (15%) have replied to every question, while 12 (26%) have yet to reply. Table IV shows the full range of response rates.

No. of times members have responded	No. of members responding	% of membership responding
0	12	26%
1	14	31%
2	11	24%
3	2	4%
4	7	15%

Table IV: Number of times each Panel member has responded.

Discussion

To begin with we had set no specific target for the number of Panel members we wished to recruit, preferring to see what response our initial invitation obtained, and reserving the right to be selective if necessary. When we analysed the response, we concluded that the general balance of applications (Table I) was sufficiently broad and reflective of our registered users to be acceptable without the need for a selection process.

However, a more detailed analysis has shown that across all the organizations our volunteers are typically in senior and middle-ranking posts, while junior staff and students are proportionately under-represented. This was unexpected, given that the latter client groups provide some of our most active users. We believe that we need more input from these users, and we shall therefore take steps to target them specifically when recruiting to the Panel.

All the Panel members belong to the majority of our users (87%) for whom we have an email address, and there have been no volunteers from the remaining 13% of users even though our original invitation offered post as an alternative means of communication. We thus need to devise a more effective Panel recruitment process that will encourage the significant minority of users without email to become involved.

We felt confident that the number involved - 46 - would enable us to expect an adequate response to any question we posed even if some members did not reply. Thus far this has proved to be the case, though the two most recent questions have received a lower response rate than did the first two (Table II). The two recent questions were issued almost simultaneously, and it is possible that some members have found the prospect of composing two replies in quick succession too demanding a task, and have thus chosen not to respond. As a result, we plan in future to leave longer gaps (> 2 weeks) between questions whenever possible.

A possible drawback to the recruitment process might be the ease with which volunteers could join the Panel in order to comment on more contentious subjects, hoping to manipulate discussions and change the weight of argument in their favour. This risk is reduced by our practice of insisting that members' views simply help us to make informed decisions, and do not constitute a collective decision by means of a majority vote.

Although several volunteers had originally offered to represent the views of a group of colleagues, using whatever processes of consultation were available to them, none of them has so far given a response that claimed to be more than their individual opinion. Since we have not required Panel members to act in a representative capacity we have not regarded this as weakening the value of their contributions.

At the same time, however effective the Panel might appear to be in providing us with a consensus of views, we recognize that for some issues it will still be necessary for us to communicate separately and more directly with recognized groups and their official representatives.

Answers have varied in length from a few words to a maximum (so far) of 170 words, and we have been impressed by their quality: they have consistently produced perceptive comments and innovative ideas.

For each question posed, we were seeking advice rather than decisions. With two of the four questions so far (Questions 1 and 4) the issue under discussion was not, in any case, one requiring a simple decision. Question 2 (Easter closing) produced a very substantial majority in favour of closure, and we duly decided to follow this advice. Perhaps most enlightening so far has been the response to Question 3 (stock checks): unlike the other parts of the University Library, which routinely close for a week or so to conduct checks, it has always been our policy not to follow suit, in the belief that a complete closure would be unacceptably disruptive to our clinical user groups. However, 64% of those answering this question preferred closure as being the quickest and most efficient process; and more than three-quarters (78%) of those favouring this course of action were NHS-based users. This illustrates how the Panel's clear preference for one course of action can benefit our decision-making. We have yet to finalise our decision on how to proceed, but are certainly reconsidering our former position.

Questions 1 (journal consultation process) and 4 (social networking) were seeking a less prescriptive response. Question 1 generated a very constructive group of comments, including several that ranged well beyond what we had specifically requested, and helped us to make significant improvements to the consultation process; while members replying to Question 4 (social networking technologies) have overwhelmingly told us that they are either generally ignorant of the technologies we listed, or are reluctant to see them used for

work-related communication. This suggests two immediate conclusions: (a) that if we do decide to develop any services exploiting these technologies, we shall need to devote much more effort than usual to marketing them; and (b) that while our Panel membership appears to span a broad range of interests and professional grades, it may be unrepresentative of the younger age group (we did not ask volunteers to tell us their ages).

We had hoped that the interaction between the library and the Panel would encourage shared discussions and a two-way dialogue, which might motivate them further and foster a sense of ownership in the outcomes. So far this has not happened. When questions have been sent out to the Panel, we have always used a group email address that would enable each member to reply either directly just to the library or simultaneously to all other members. We have given no guidance on which of these options the members should use, but without exception every response has thus far been sent only to the library and not to the Panel in general. We have provided general feedback to the Panel on how we have been able to use their replies, but have not yet found it necessary to send specific replies to any individual member. No Panel member has yet taken the initiative in proposing issues for discussion, though some of the more wide-ranging comments on our questions have suggested secondary topics that might repay further exploration.

Because members of the virtual Panel do not meet around a table, they may lose the stimulus of participating in spontaneous face-to-face discussions, and the sense of being part of a team may be absent or weakened. We hope to help alleviate the latter point, if not the former, by holding informal social receptions from time to time.

A quarter of the Panel members have not yet responded to any question (Table IV). In keeping with the principle that all members would be free to decide how often they contributed to our discussions, no attempt has been to approach the non-respondents and explore the reasons for their silence. We plan to contact all Panel members at the end of the first year to seek their feedback on the way it has been working, to discuss how it might be improved, and to ask whether they wish to continue as members. Those who have not participated up to that point will be permitted to remain as members if they feel that they might still be able to contribute (though we are unlikely to agree to their membership continuing into a third year if they remain silent through the second).

We do not claim that the Panel members' opinions will ever represent a rigorously-tested and statistically significant set of results, and at this early stage our experience can be no more than an indicator of what is possible. While we regard the Panel's current composition as being more than adequate in its ability to reflect users' opinions, we are conscious that it might nonetheless usefully be enlarged in order to provide a broader basis for advice.   The invitation seeking volunteers will therefore remain open on our website, encouraging others to apply at any time.

Setting the Panel up required a small investment of time devoted to writing and distributing the original invitation and organising the launch party. Since then the work involved in managing it has been minimal - framing questions in order to supply sufficient information without requiring members to read over-lengthy documents, issuing a single group email each time, and logging and analysing the responses as they are received.   This workload is heavily dependent on the number of times we approach the Panel, and it is in the interests of both library staff and Panel members that the frequency is carefully controlled to avoid "question fatigue".

Some members may also be unhappy with the library's response to their opinions, if their advice is not followed. It is important that the library provides rapid feedback to the Panel, giving a reasoned explanation of our eventual decisions, in order to keep our respondents on board.

Conclusions

The User Advisory Panel has proved to be a viable alternative to our previous committee structure as a means of obtaining users' views regarding topics on which we feel we could benefit from guidance. Although there are still areas where its representativeness might be improved, it has enabled us to make decisions with a greater degree of confidence that they are in the best interests of our users, and with evidence to support our decisions if other users complain about them. The Panel has not yet become the two-way forum for dialogue that we had hoped would emerge, but it is still in its infancy and we hope that its members will take the initiative more in the course of time.

The small demand placed on our users' time in order to give the library advice is an obvious advantage of this method of communication. There is no longer a need to wait for committees to form and advise on different aspects of policy. Equally the library benefits greatly from the speed, timeliness and ease with which responses can be gathered and analysed.

The questions we have asked have of course arisen from the specific needs of a single library, but they serve to illustrate the potential of this form of communication - a potential that might be enhanced by the use of emerging Web 2.0 applications to improve communication further. Our experience so far leads us to believe that both the concept of a virtual Panel and the methodology we have adopted are applicable in other libraries needing to establish their users' views on issues of local importance.