OCLC-LIBER Workshop Series on Social Interoperability

SESSION 3

Making your plan for developing cross-functional relationships at our institution

HOST

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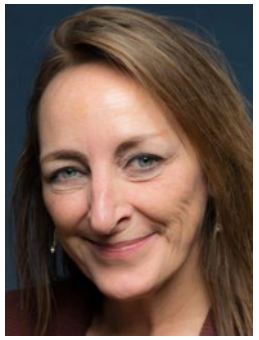

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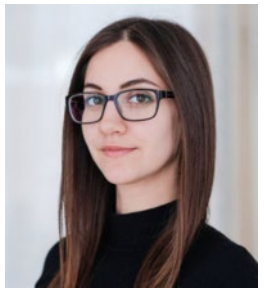

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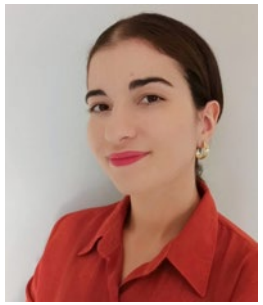

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FIRST SESSION'S RECAP

- Concept of "social interoperability"
- Why working in the "complex adaptive system" of the typical research university is challenging
- A model for discussing the different institutional stakeholders in research support/open science
- Started mapping out your own landscape using that model

LAST SESSION'S RECAP

Social Interoperability:

- From theory to practice
- Strategies and tactics: Secure buy-in, Build relationships, and Troubleshoot
- Case studies
- Personal experiences

HOUSEKEEPING NOTES

- **Only the presentation parts of this workshop are being recorded.** Participants will receive links to the videos shortly.
- **Handouts were sent to you in an e-mail and can also be found on the website**
- **Questions?** Put them in the chat box and we'll try to address them right away.
- **Mute your microphone** when not speaking
- **Enable your video**, if possible
- **Participate!**

FORMAT FOR THE DAY

- Presentation I
- Small group discussion
- Presentation II
- Small group discussion

Questions throughout the workshop!

THANKS!

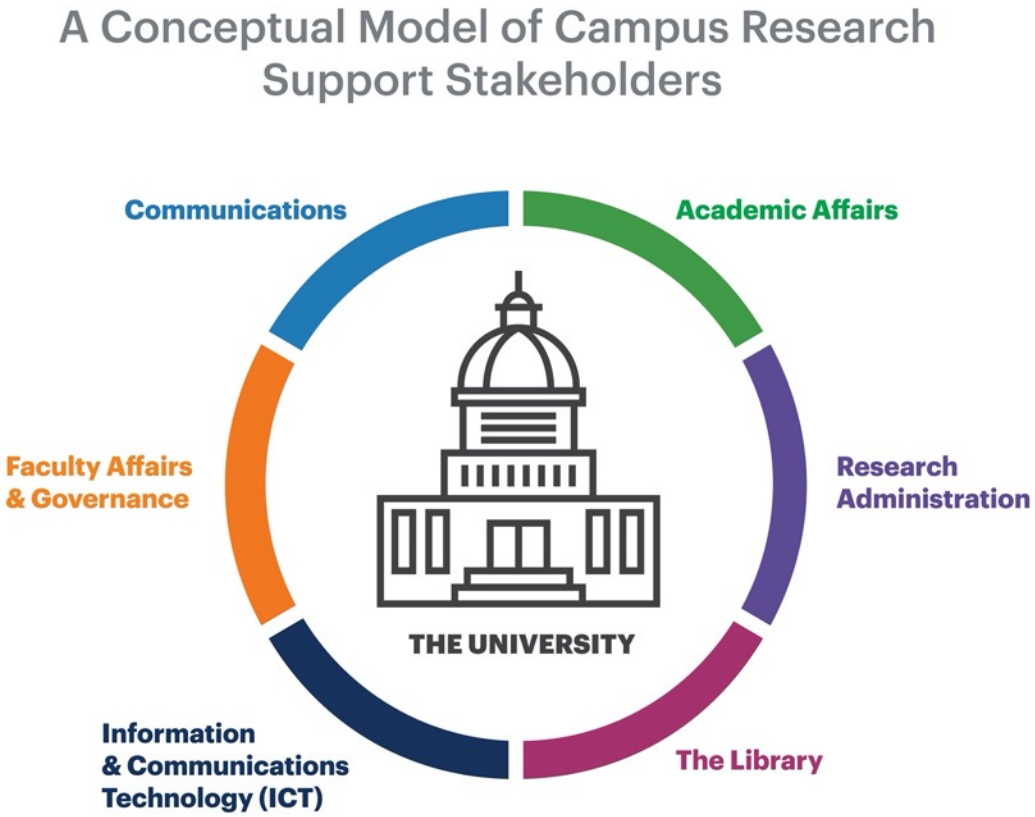
Ice breaker (Poll 3.1)

Go to http://pollev.com/oclcr001

What is one word to describe how you feel right now?

Objective for the day

- You leave with the skeleton of a plan on how to engage this particular stakeholder
- You leave with the motivation to do it
- You leave with the confidence you now have the tools to do it



The Library as a stakeholder

The Library

Central campus unit and **trusted, “agnostic” partner** for **sustainable** projects

Recognized expert in

- Metadata
- Licensing
- Vendor support / negotiations
- Research impact / bibliometrics

- Tend to emphasize value
- Tend not to use business language
- Have a preference for “free” and “open”

they don't focus on [the] bottom line [in terms of productivity] ...
you just can't sit around and have more and more meetings to discuss stuff. [...]
Get it done!

They absolutely do not move at the same pace that research faculty move in.
[…]
Things are moving and the library moves very slow.

Poll 3.2

http://pollev.com/oclcr001

Think about a non-library stakeholder you work with.

How would <u>they</u> describe the library in one word or phrase?

Use single words or multiple words linked by underscore
as in “word_cloud”.

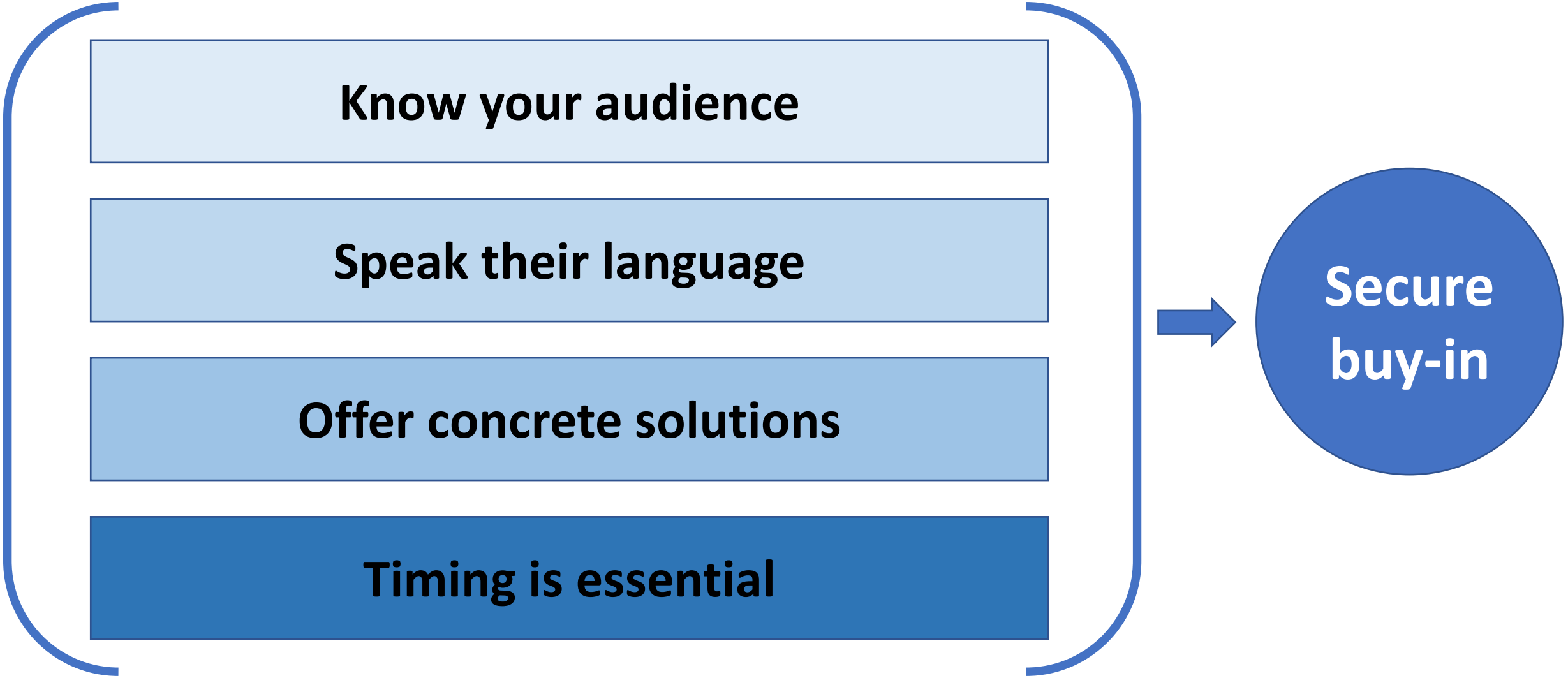
“What can I do for you?” [s.o. from the library asked]

… how the hell should I know what he could do for me?
I don’t know what he knows. I don’t know what resources he has. I don’t know how much time he has.

So it’s not my job to educate him on how he can help me. It’s his job to figure out what my needs are, and to come in with, “Hey, I’ll bet you’re trying to…”

Learn about other units

Secure buy-in: Tactics



The script for learning about other units

- Part of Rutgers New Brunswick Libraries **Strategic Planning Initiative**
- **Interviews** based on this script
  - Administrator & Faculty Interviews: 31
  - Teaching Faculty: 118
  - Graduate Students: 30 (adapted set of fewer questions)
  - Undergraduate Students: 476
- Supported by some other methods

A script for learning about other units used at Rutgers University–New Brunswick[43]

1. In what major ways do you see the University's work and focus changing during the next 2-3 years?
2. How are these changes affecting the work and focus of your school/department/program (unit)?
3. What are your unit's goals for the next 2-3 years?
4. What about your responsibilities within the unit? What are your top

Top level priorities

1. In what major ways do you see the **University**'s work and focus changing during the next 2-3 years?

2. How are these changes **affecting** the work and focus of your school/department/program (unit)?

Unit goals, responsibilities and challenges

3. What are your **unit's goals** for the next 2-3 years?

4. What about **your responsibilities** within the unit? What are your top responsibilities now, and how do you see these changing over the next 2-3 years?

5. What **challenges** must your unit overcome in order to meet its goals?

Unit needs and opportunities

6. If you were a new hire, what **tools and services** would you **need** to be successful?

7. The next several years will not only be all about challenges. What are the **opportunities** that you unit will be pursuing? What do you see as **exciting** during the next few years?

Finally, the library

8. How do the librarians and libraries **contribute** to your work **now**?

9. Considering the University's goals, and your unit's goals, how could the libraries best **contribute** to the work of your unit- and to you – **during the next few years**?

10. What do you want the libraries to give careful consideration to as we craft our **strategic plan**?

Small group discussion #1 (15 minutes)

3. What are your unit's goals for the next 2-3 years?

4. What about your responsibilities within the unit? What are your top responsibilities now, and how do you see these changing over the next 2-3 years?

5. What challenges must your unit overcome in order to meet its goals?

Use the „Script for learning about other stakeholders“ (handout).

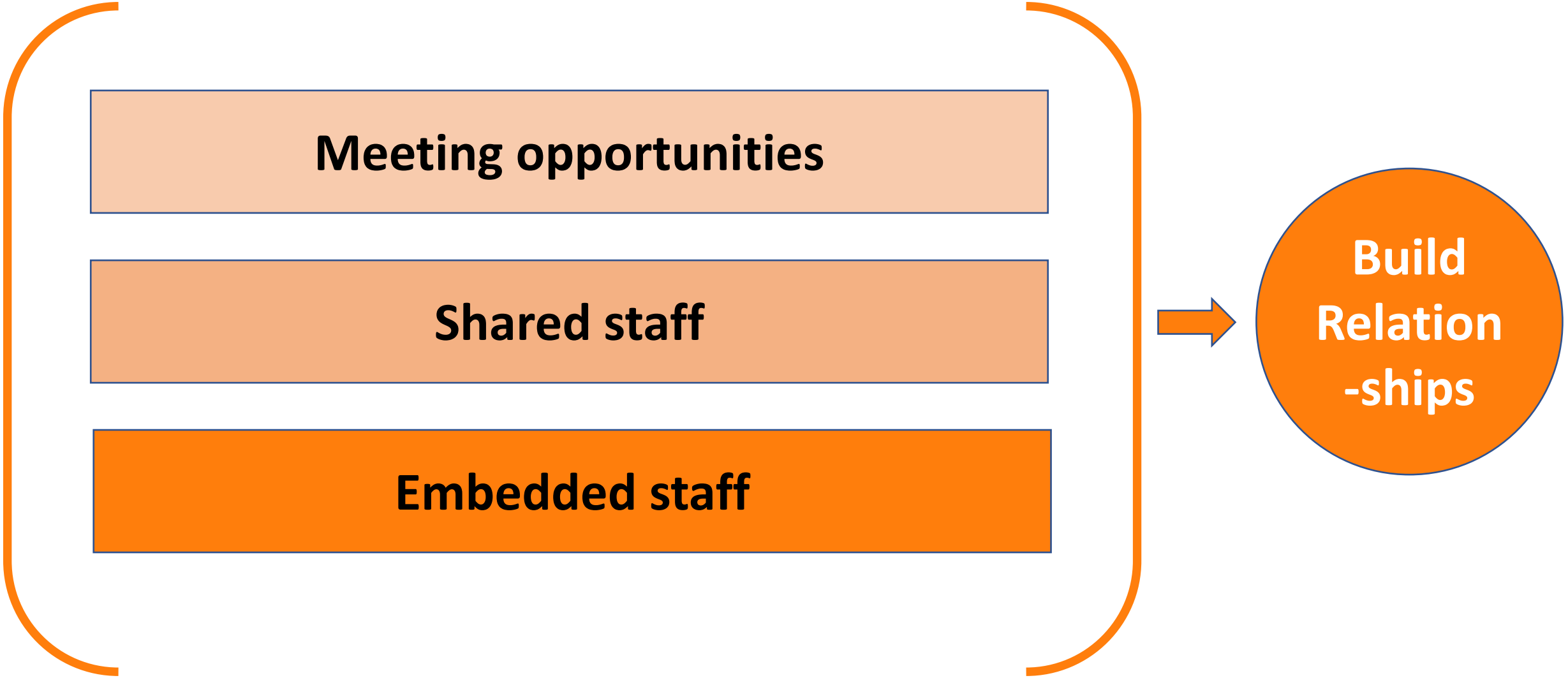
Work together as a group to identify THEIR likely responses to questions no. 3-5.

Do you feel like you have enough information to do that?

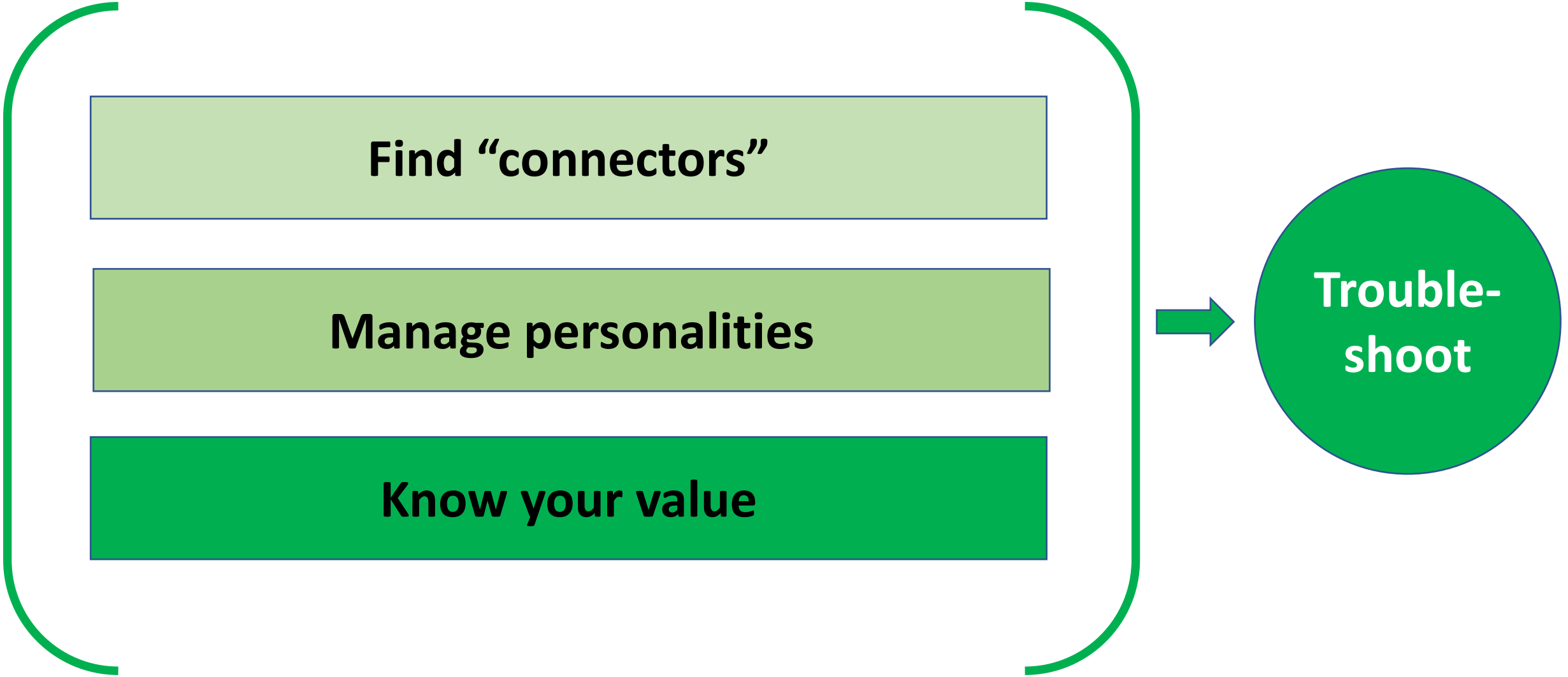
If not, how could you fill the gaps, prior to conducting the full informational interview?

Build Relationships and Troubleshoot: Make your plan

Build relationships: Tactics

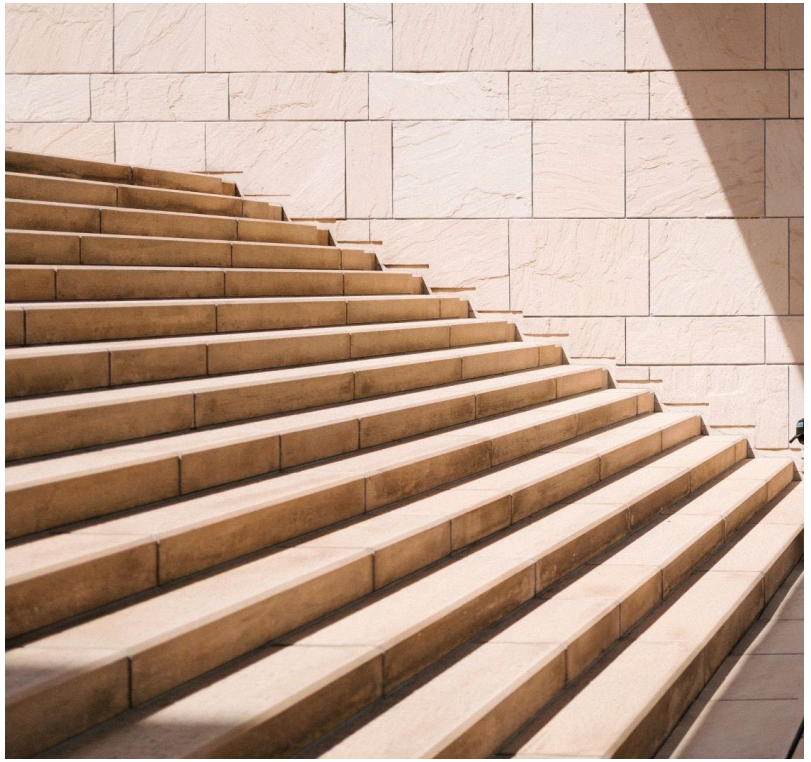


Troubleshoot: Tactics



Poll 3.3

Go to http://pollev.com/oclcr001



What is the key challenge or discomfort to you in creating new relationships?

You can use words or phrases here.

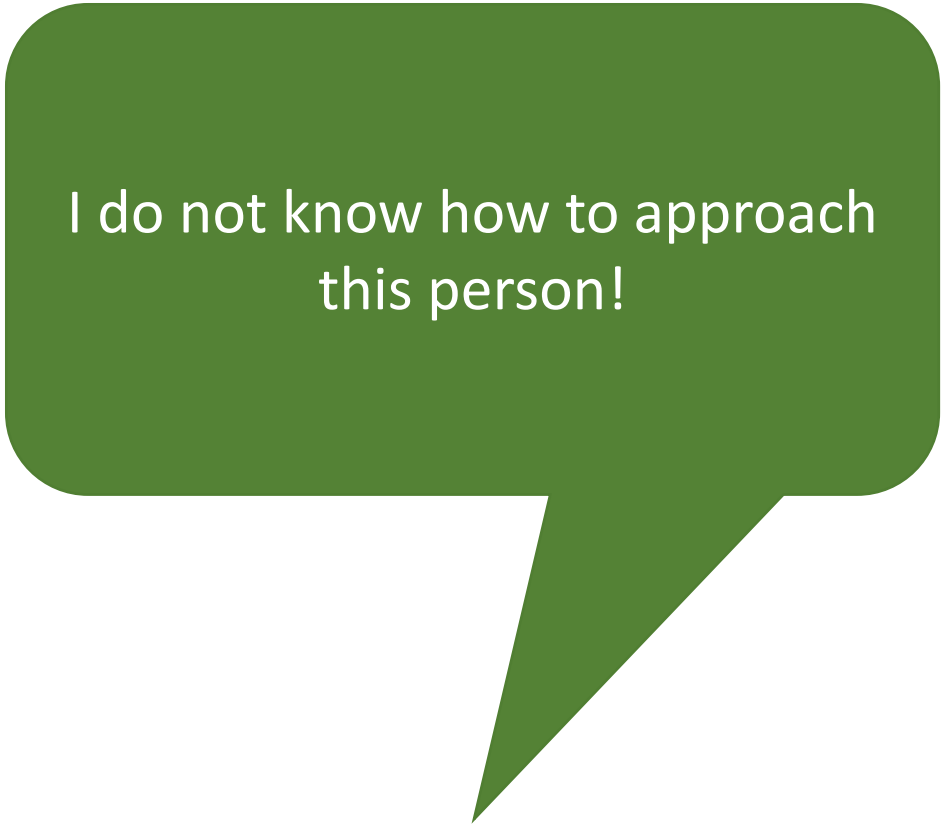
Poll 3.4

Go to http://pollev.com/oclcr001

Do you identify as
more of an intro- or extrovert?

Barriers

- Introversion vs. Extroversion
- Getting out of the comfort zone
- Time to build and steward relationships
- Emerging roles: Isolation. Stress. Not knowing where to start.



Small group discussion #2 (15 minutes)

8. How do the librarians and libraries contribute to your work now?

9. Considering the University's goals and your unit's goals, how could the libraries best contribute to the work of your unit—and to you—during the next few years?

Use the „Script for learning about other stakeholders“ (handout).

Work together as a group to identify THEIR likely responses to questions no. 8 and 9.

Do you feel like you have enough information to do that?

If not, how could you fill the gaps, prior to conducting the full informational interview?

Moving on from here

- Complete the “Script for learning about other stakeholders“ with what you think you know.
- Test your assumptions, fill the gaps over time as you do your research on them and maybe also get in touch with the stakeholder more often.
- **Conduct the informational interview.** Knowledge resides in people!
- Share with peers, e.g. using a “trip report” format
  - Share what you learned
  - Share what you did and how
  - Encourage others to follow your lead

Poll 3.5

Go to http://pollev.com/oclcr001

Now you have followed this training:

- What's one word to describe how you feel about cross-campus collaborations at your institution?

Conclusion

This was a pilot. We would like to hear from you!

Help us improve this training by completing the evaluation survey that is coming your way shortly.

(The link should now be in the chat.)

Thank you!