From Chaos to Planned Future: Transforming LibGuides from Pathfinders to Learning Objects

In the Time of Chaos

Developing a plan

Implementation & Effective Communication

Success is just the Beginning

Planning the Future

Marisol Ramos, M.A., M.L.I.S.
Digital Scholarship / Humanities and Social Sciences Librarian
Subject Specialist & Bibliographer for Latin American & Caribbean Studies, Latino Studies, Spanish, Anthropology, and Sociology
University of Connecticut
In the Time of Chaos: LibGuides v.1

• UConn Libraries adopted LibGuides in 2007
  – Decision was made as part of a Task Force to decide future of Subject webpages

• Implementation lacked:
  – Guidelines or Policies
  – Any type of oversight, or key coordinator
  – A shared understanding of what is the purpose of guides:
    • Pathfinder or Learning Objects?
    • List of Resources or Contextual Resources?
In the Time of Chaos: LibGuides v.1

• Consequences: Chaos!!
  – Duplication of guides
    • Especially course guides (e.g. 100+ similar ENG 1010)
  – Incomplete statistics
    • Links embedded in Rich Text Boxes
  – Guides did not follow accessibility standards
    • Not alt-text for images
    • Overused of color for emphasis
  – A Riot of Guides!
    • By 2017 there were over 700 guides
In the Time of Chaos: LibGuides v.1
In the Time of Chaos: LibGuides v.1

Links embedded in Rich Text Boxes
- Impossible to check for broken links automatically
- No usage statistics available
In the Time of Chaos: LibGuides v.1

- Non-Accessible elements
- Color Text
- Sub-Pages (unfindable by Screen Reader Software)
Developing a Plan: First Steps

• Gathering Data
  – Off-site
    • Environmental Scans
    • Interviews with Trailblazers
    • Webinars & Reading Migration documentation
  – Locally
    • Survey
      – To understand likes and dislikes for v1 and perception regarding migrating to v2
Developing a Plan: First Steps

- Focus Group
  - To request feedback regarding:
    - The creation of the LibGuides Management Team (LGMT)
    - Roles for members
    - Documentation
      - Policy
      - Best Practices/Guidelines
      - Definitions of guides
      - Templates
Developing a Plan: Second Steps

• Report for Admin:
  – Request to implement a Planned Migration & the creation of a Cross-Program Team to oversee it
    • Migration and management of guides needed to align with Library Priorities
      – Data gathered support our arguments
  – Request a true mandate for action:
    • Without a mandate with actual teeth we couldn’t make guide owners accountable or implement library wide actions

Key to Success: Leading with Authority!
Developing a Plan: Second Steps

• LibGuides Management Team was created to:
  – Write & implement new policies, guidelines & Best Practices*
  – Manage transition and future developments
  – Offer training
    • Basic editing in v2
    • Transforming their pathfinder into learning objects

Learning objects in this context refers to creating modular resources (a box, a page or a whole guide) that can be used and re-used to support learning activities

* Thanks to Boston College and University of New Hampshire for allowing us to adapt their guidelines for our library!
Developing a Plan

• Established Flexible Timeline
  – Worked with Springshare to pick date of migration and date for going live
    • Request to have a longer than usual Beta period (6 months)

• Assigned tasks among members
  – Drafting policies & guidelines
  – Templates
  – Publishing Workflow & Reviewers
  – Communication (shared message)
Developing a Plan

- Plan to implement Publishing Workflow in LibGuides
  - Designed reviewers (members of LGMT)
  - Manage Reviews Queue
    - Review guides in a timely matter
    - Track Queue of Reviews
  - Document all decisions

- This tool was one of the key to make the migration to v2 a success
  - It was the mechanism to enforce compliance
Implementation

• The Beginning (Aug. 2015-June 2016):
  – Preliminary Area Goal to get ready to migration:
    • Environmental Scan
    • Guide Owners Survey & Focus group
    • Request to decluttering and deleting duplicated guides
    • At the end of this phase, we realized that this process needed Admin backing...Therefore, LGMT was created

• Migration was planned and implemented as follow:
  – Phase I: Pre-Migration (June-Dec. 2016)
  – Phase II: Actual Migration (Dec. 30, 2016)
  – Phase II: Post Migration (January 2017-March 2018)
Implementation

• Phase I: Clean Up & Review
  – Guide owners needed to revise and/or delete guides using new guidelines
  – Special emphasis to review main subject guides

• Phase II: Migration! (The easiest phase!)
  – Delay going Live until May 31st, 2017

• Phase III: Publishing Workflow Enforced
  – We have 6 months to offer workshops and help owners to use the new v2 interface and learn how to apply the new guidelines
  – We informed guide owners:
    • Migrated v1 guides would not be published without being reviewed and approved first
Implementation

• Workshops & Projects
  – Intro. to v2 interface & guidelines
    • Storrs and Regional campus
  – Instructional Design for LibGuides series sponsored by Reference & Curriculum Services
    • Topics:
      – Introduction to Instructional Design Principles
      – Developing Learning Objectives
Implementation

• Workshops & Projects
  – Edit-thon! A designated time & place for owners to work on revising/edit their guide
  – Merging & Embedding Projects
    • Purpose: Consolidate Information and Eliminate Unnecessary Duplication
      – Merging Similar Course Guides into one Master Guide
      – Converting Subject Specific Course Guides into Course Pages to be Embedded inside Subject Guides

These Training and Projects Helped Guide Owners to Begin the Process to Start Building Contextual Resources Guides
Effective Communication

• Email was the main communication tool to share:
  • News
  • Instructions
  • workshops opportunities
  • updates for migration process

• Consultations (online or by phone):
  – A way to communicate and provide one-on-one training for Regional Campus Librarians

• All messages were crafted to be consistent, transparent and empowering to all guide owners
Success is just the Beginning

• Success by the number
  – From 688 to 129 guides
    • 500 guides deleted!!
  – Published Guides:
    • Subjects: 41
    • Course: 15
    • General Purpose: 25
    • Topics: 15
  – Unpublished/Private: 35
  – Total guides reviewed: 96
Success is just the Beginning

• Achievements
  – All guides follow accessibility standards
  – Guides have become more learning objects instead of pathfinders
  • Content is contextualize so users know why and how to use library resources to find what they need

Still, there is more room for improvement!
Success is just the Beginning

Welcome to the UConn Library Research Guides
Your one-stop portal to help you with your research!

Showing 53 Subjects

<table>
<thead>
<tr>
<th>Subject</th>
<th>Count</th>
</tr>
</thead>
<tbody>
<tr>
<td>African American Studies</td>
<td>5</td>
</tr>
<tr>
<td>African Studies</td>
<td>2</td>
</tr>
<tr>
<td>Agriculture</td>
<td>4</td>
</tr>
<tr>
<td>Animal Science</td>
<td>1</td>
</tr>
<tr>
<td>Anthropology &amp; Archaeology</td>
<td>2</td>
</tr>
<tr>
<td>Arabic &amp; Islamic Studies</td>
<td>1</td>
</tr>
<tr>
<td>Asian American Studies</td>
<td>1</td>
</tr>
<tr>
<td>Biology</td>
<td>2</td>
</tr>
<tr>
<td>Business</td>
<td>7</td>
</tr>
<tr>
<td>Chemistry</td>
<td>2</td>
</tr>
<tr>
<td>Chinese Studies</td>
<td>1</td>
</tr>
<tr>
<td>Communication</td>
<td>2</td>
</tr>
<tr>
<td>Computer Science and Engineering</td>
<td>2</td>
</tr>
<tr>
<td>Journalism</td>
<td>1</td>
</tr>
<tr>
<td>Latin American &amp; Caribbean Studies</td>
<td>4</td>
</tr>
<tr>
<td>Linguistics</td>
<td>1</td>
</tr>
<tr>
<td>Literature</td>
<td>4</td>
</tr>
<tr>
<td>Mathematics</td>
<td>1</td>
</tr>
<tr>
<td>Medieval Studies</td>
<td>1</td>
</tr>
<tr>
<td>Natural Resources</td>
<td>1</td>
</tr>
<tr>
<td>Nursing</td>
<td>2</td>
</tr>
<tr>
<td>Nutritional Sciences</td>
<td>1</td>
</tr>
<tr>
<td>Open Educational Resources</td>
<td>1</td>
</tr>
<tr>
<td>Open Educational Resources</td>
<td>1</td>
</tr>
<tr>
<td>Pathobiology &amp; Veterinary Science</td>
<td>1</td>
</tr>
<tr>
<td>Pharmacy</td>
<td>1</td>
</tr>
<tr>
<td>Philosophy</td>
<td>2</td>
</tr>
</tbody>
</table>

Research Now!
Develop your research skills! These guides will help you get started with a research question, find and evaluate information, and use it for your project.
- Research Now!
- Get Started
- Explore Information
- Find Information
- Interrogate & Evaluate Resources
- Understand Citations

Featured Guides
- eReference Books Guide
- Stable Linking to Electronic Resources
- HuskyCT: Integrating Library Resources
- Citation Guides and Management Tools Guide
- Citation Analysis for Promotion & Tenure
- Open (and Alternative) Educational Resources
Success is just the Beginning

• Lessons Learned
  – No matter how good are your guidelines & best practices, people are not going to read them
    • But, reviewers can use the guidelines & best practices to teach guide owners how to improve their guides

Guidelines Matters to Model Change
Success is just the Beginning

• Lessons Learned
  – The Tortoise was Right: Slow and Steady Wins the Race
  – Budgeting time to:
    • Write policy & guidelines
    • Provide training
    • Review, Revise & delete guides

Allowed us to accomplish our first set of goals
Planning Matters!!!
Success is just the Beginning

• Lessons Learned
  – People may be afraid of sudden changes but are more open to change their work habits if change is introduced gradually
  – Regular training opportunity build competencies necessary for change

Training Empowers People!
Success is just the Beginning

• Lessons Learned
  – Relentless Communication & Transparency
  – Communicate timelines, deadlines and expectations on a regular basis
    • Not only say what need to be done but why it needs to be done
  – Always answers honestly

Transparency build Trust
Success is just the Beginning

• Key factors for Success
  – Leading with Authority
    • Authority to implement change
  – Two-Way Communication
    • Often and clear
    • Seek feedback
  – Flexibility
    • Implement the rules but be flexible as needed
    • Timelines are not fixed in stone
  – Teamwork
    • Skills, knowledge, availability, patience
Success is just the Beginning

• Build from your Successes
  – Keep track of what work and what doesn’t
  – Guidelines are living documents; update them accordingly

• Celebrate Success!
  – Each benchmark should be celebrated
  – Success breed success

• To the Next Challenge
  – Identify new areas of improvement
Planning the Future

• Creating a Framework for Research Guides that incorporate:
  – Instructional Design
  – Assessment
  – Learning Outcomes

• We added a new member who is a Instructional Design Specialist to help us with this new task
Planning the Future

• Goals
  – Further define the purpose of the different types of guide we create
  – Identify what we want to assess and how
    • Identify criteria and create rubrics
  – Incorporate Active Learning activities for online and face-to-face interaction using guides
Planning the Future

• Incorporate creating a new framework as part of Area’s Goal
  – Therefore all members of the department see this process as part of the work and can add it to their personal performance goals

• Plan workshops to further the understanding among guide owners of the value of instructional design to create research guides as learning objects.
Planning the Future

• We will continue managing, maintaining and auditing research guides to maintain the quality, appropriateness and currency of all our guides (old and new)

The Future is like a road, it just keep going and going!
Recommended Readings


Acknowledgements

Kathy Labadorf, Carolyn Mills, Shelly Goldstein, Kate Fuller, Rick Sarvas, Michael Rodriguez, Marissa Gauthier, Holly Jeffcoat, Jason Nicosia, and all the Staff at UConn Library

For their hard work and collaborative spirit to accomplish this task!