LIBRARY
ALL STAFF MEETING

January 13, 2016

AGENDA

- MAP3
  - » Leading up to the Retreat
  - » During the Retreat
  - » Resourcing Overview
- Excellence Canada Silver
  - » People Engagement
  - » Updates and next driver
- Library Revitalization – Phase 1
- General Q&A

MAP3

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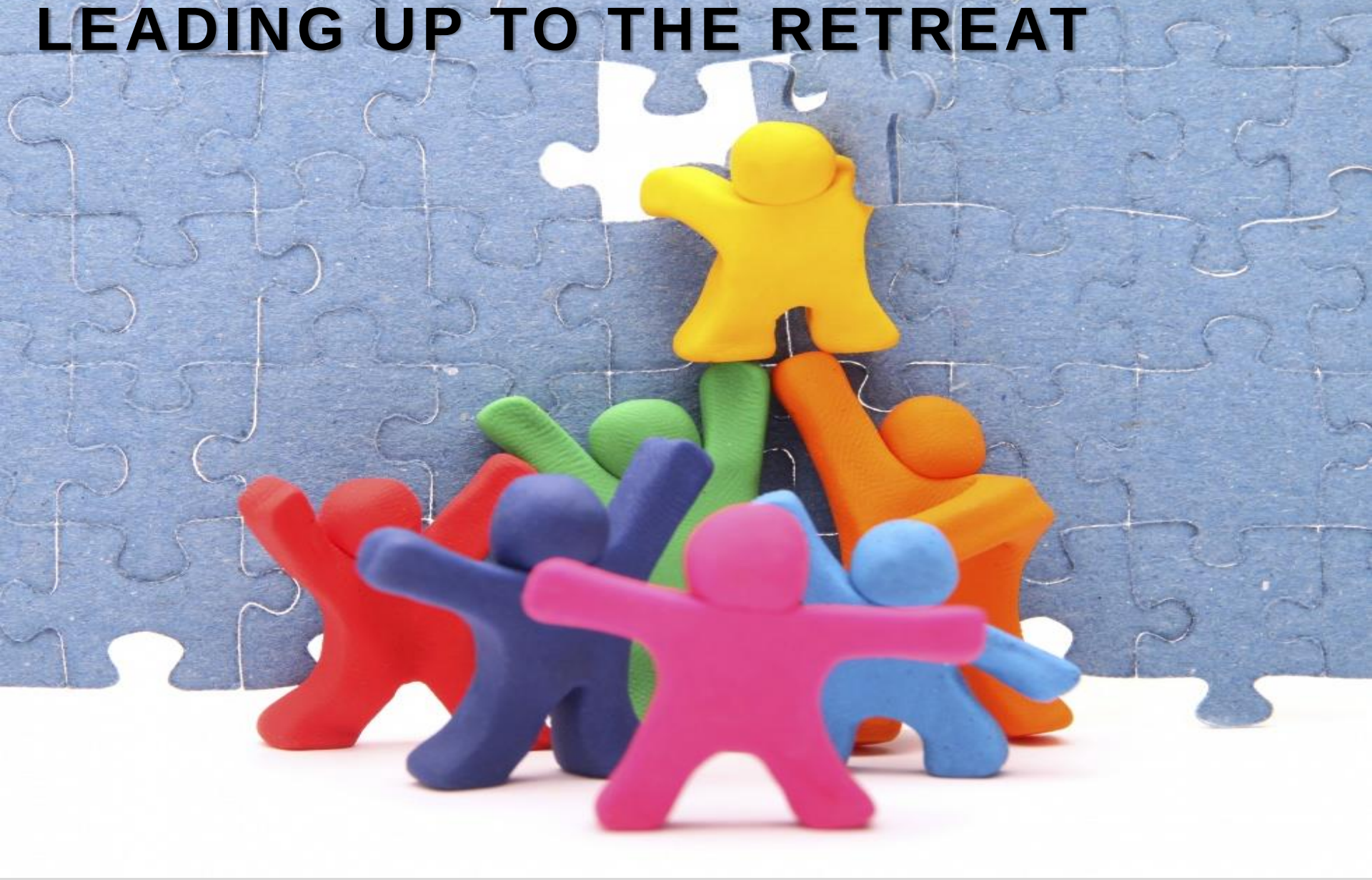
LEADING UP TO THE RETREAT



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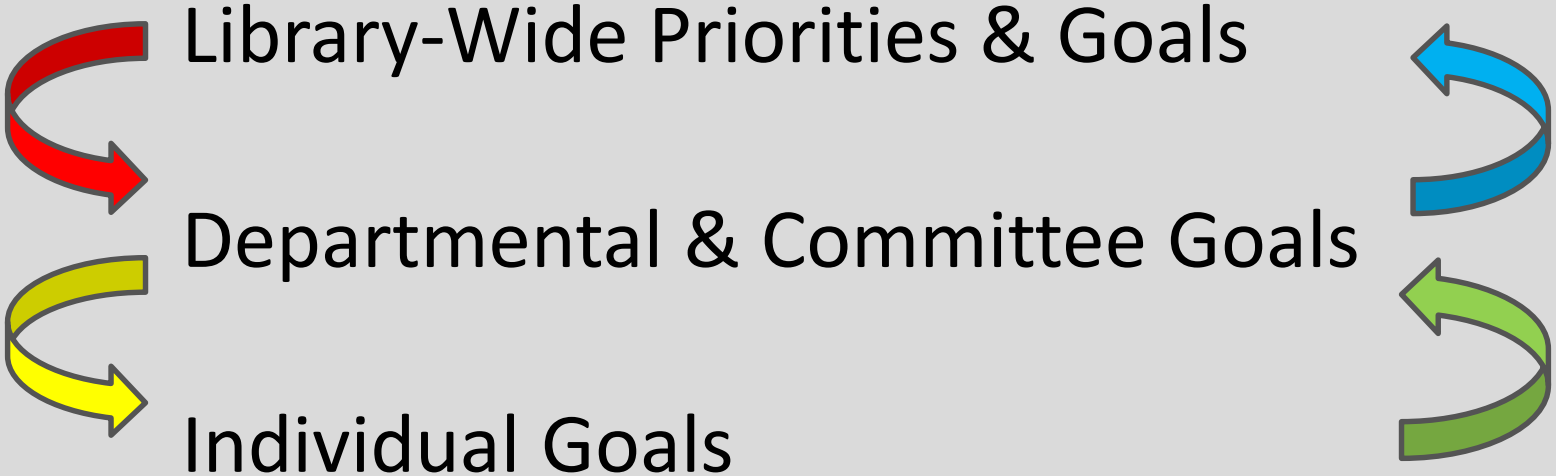
MAP3 – WHAT IS IT?

A new **M**ulti-year **A**nnual **P**lanning & **P**riorities **P**rocess



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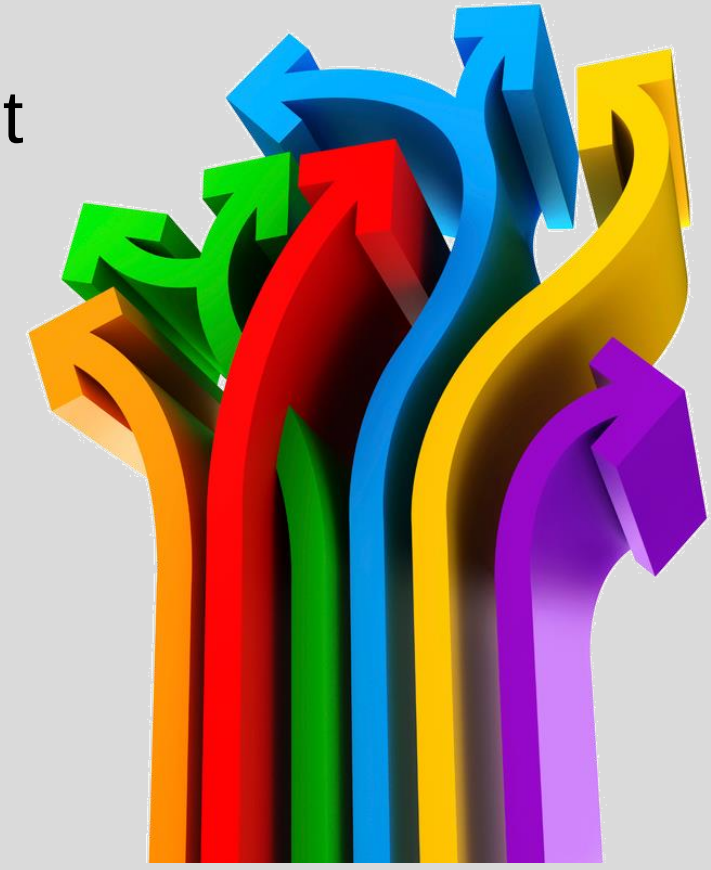
GUIDING PRINCIPLES FOR THE PLANNING *PROCESS*

- Include:
  - » Active engagement of all staff
  - » Flexibility
  - » Transparency and communication
  - » Monitoring, measuring, evaluating, documenting
  - » Acknowledging/celebrating

PLANNING FRAMEWORK

- Outlines:
  - » Internal & external context
  - » Annual timeline
  - » Mid-year check-in



CRITERIA FOR CONSIDERING POSSIBLE PROJECTS

- Include:
  - »Alignment with Library and Campus strategic directions
  - »Balancing strategic objectives and operational needs
  - »Skills development opportunities

PUTTING MAP3 INTO ACTION

1. Departments, committees and working groups identified challenges and opportunities

2. Possible projects were identified to be considered as priorities for the upcoming year

What kind of projects?

- involve more than one department and/or
- require new resources or funding and/or
- require significant use of existing staff time

PUTTING MAP3 INTO ACTION

3. Possible projects were described using a project proposal template

53 proposals were submitted!

4. Retreat Preparation

- Retreat design with external facilitator (Jo Nelson)
- Gathered participants
- Participants read 53 proposals!
- Assignment of proposals to small groups

DURING THE RETREAT

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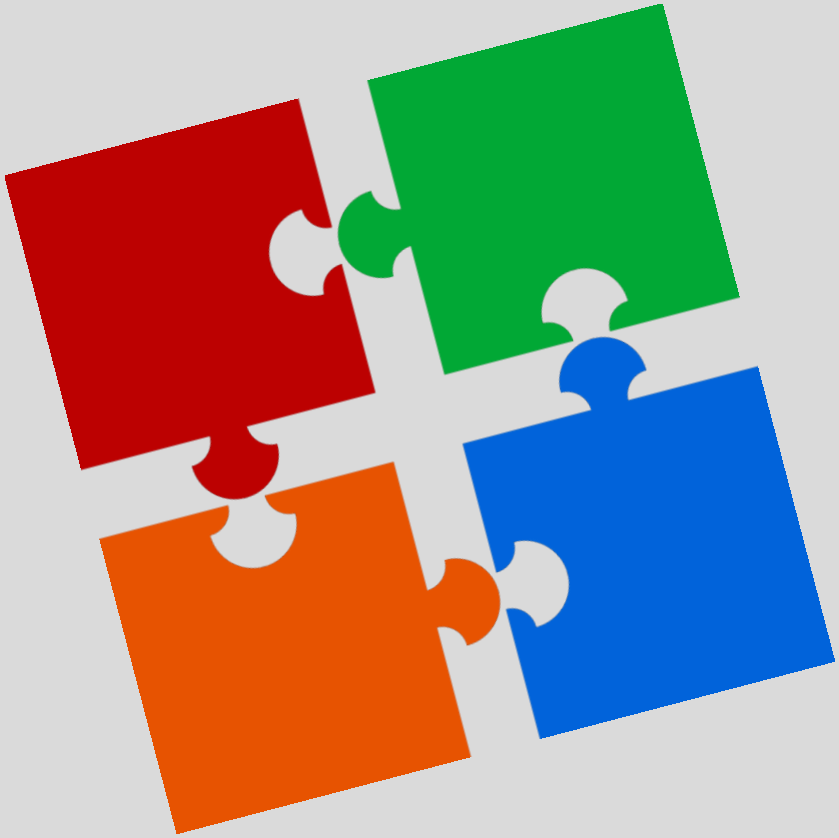
BEFORE THE RETREAT

- Preparation
- External Facilitator
- Offsite location



GETTING STARTED

- Working Assumptions
  - » Everyone has wisdom
  - » We need everyone's wisdom for the wisest result
  - » There are no wrong answers
  - » The whole is greater than the sum of its parts
  - » Everyone will be heard and will hear others
- Campus context
  - » IAP Presentation

GETTING STARTED

- Library environmental context
  - » Excellence Canada
  - » OCUL Collaborative Futures
  - » Library Revitalization
  - » Ongoing projects summaries
- Proposal Review and Clarifications

How well does this project meet the prioritization criteria? (H=High, M=medium, L=low)

Alignment with Library and Campus strategic directions	Balancing strategic objectives and operational needs	Impacts on/ Benefits to end-users and staff of doing and not doing	Evidence-based, engaged approach to proposal development	Cost (including staff time)	Timeline and feasibility for involved staff	Mission-critical nature/ urgency
How strategic is this project, keeping in mind breadth and depth while focusing on the Library's strategies?	To what degree does this project improve our operational capacity?	To what degree does this project benefit the target audience? To what degree is not doing this project detrimental to the target audience?	Set aside	Add in comments sections the resources required	To what degree is this specific project feasible with current staff, skills and tools?	What is the level of urgency of this project?

How does this project relate to other projects (dependencies/relationships)? *i.e.*
Does another project need to happen first or simultaneously for this one to be successful?
Does this project need to happen first or simultaneously for others to be successful?
Is another project related?
Anything else?

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SETTING PRIORITY-LEVELS FOR EACH PROPOSALS

- 2 test cases done as a wider group

- Broke into small groups to assess projects
  - » Assessed roughly 8 proposals per group
  - » Answered questions in order to designate priority level

SETTING PRIORITY LEVELS FOR EACH PROPOSAL

Presenting to the Larger Group:

- Explained reasoning behind the priority level designated
- Opportunity for constructive questioning and clarifications
- Overall, no priority level reassignment occurred during the larger group discussion

PROPOSED TIMELINE

- Showed “bottlenecks” and highlighted areas that Library Managers had to consider carefully
- Highlighted dependencies and interrelations between projects, necessary sequencing & potential capacity obstacles
- Showing all the desired start times revealed the unfeasibility of the potential projects

TAKEAWAYS

- Planning and preparation was integral to the day's success
- How much going on in terms of projects beyond the "daily work" of the Library
- Having all the projects highlighted at once, means that dependencies were clearer

TAKEAWAYS

- Capacity vs will and the need for careful project management
- Concerns were raised at the number of low hanging fruit and what that meant over time strategically
- Engaging in this retreat will allow for streamlined processes going forward

OUR PERSPECTIVES

From the eyes of a student:

- A new experience
- Lots of behind the scenes information
- Acronyms, jargon, etc.
- Benefits of a good facilitator and offsite location

From the eyes of a staff member:

- Diversity of current library projects
- No project was without support
- Focus on improving services and facilities
- Encouraging to be a part of the process

AFTER THE RETREAT

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RESOURCING PROCESS OVERVIEW

LibExec meeting

- Reviewed proposals rated as High and Low Hanging Fruit
- Preliminary cost analysis
  - » Committee expenses
  - » Temporary positions
  - » Permanent positions
- Identified resourcing questions for Managers

RESOURCING PROCESS OVERVIEW CONT'D

Before Managers' meeting

- Managers reviewed resourcing of proposals for departments and sponsored committees

Managers' meeting

- Reviewed all High and Low Hanging Fruit proposals for resourcing questions/concerns
- Next steps were determined for proposals requiring more resourcing information

RESOURCING PROCESS OVERVIEW CONT'D

Second LibExec meeting

- Final cost analysis & 1-3 years projections

Second Managers' meeting

- Final review of resourcing for approved proposals
- Identify Medium and Low projects which
  - » Enable High or strategic projects
  - » Are achievable with existing resources
- Develop communication plan

OUTCOMES OVERVIEW MAP3 RETREAT

- 53 proposals submitted
  - » 31 proposals approved
  - » 22 proposals deferred

OUTCOMES OVERVIEW: APPROVED

Monetary Requests for Events and Activities:

- Staff focused
  - » Health Safety & Wellness Initiatives
  - » ISD Training Committee Retreat
  - » LINC's Library Teaching Retreat
- User focused
  - » Long Night Against Procrastination
  - » Outreach Committee: Student Engagement, Continuing & new initiatives, and Campus fairs & events
  - » OA and Scholarly Comm (open houses & events)

OUTCOMES OVERVIEW: APPROVED

Temporary positions

- Development materials for Signage, Outreach & LINC
- ISR/CD/Bibliometrics staff support
- Funds to jointly support the course based instruction, the development of learning objects & the ArtsFirst proposals
- Rare Book collection review
- Research databases page renewal
- UW Archives

OUTCOMES OVERVIEW: APPROVED

Permanent positions

- Help Services User Experience Librarian (Service Models Next Steps)
- Service Desk & Resource Sharing positions
- Waterloo Digital Repository – Web Developer

OUTCOMES OVERVIEW: APPROVED

Using existing staff time and/or casual/contract

Collections

- CD & DVD review
- Collection Lifecycle Management Beyond the PMMP
- JSTOR Last Copy 5-8
- Print Monograph Management Project (PMMP) II & III
- Review of Acquisition Budget

Digital Infrastructure

- UWSpace Expansion – Phase II

OUTCOMES OVERVIEW: APPROVED

Using existing staff time and/or casual/contract

User focused

- AODA Working Group – Integrated Accessibility Standards Regulation Compliance
- Information Kiosks – exploration
- Institutional Quality Assurance Process (program reviews)
- LibAnswers – Next Steps
- Research Guide for Systematic Reviews
- Website Usability

OUTCOMES OVERVIEW: DEFERRED

- May be waiting for pre-requisite(s) to be completed
  - » e.g. Digital repository basis for a number of proposals
- Pieces of proposal may be extracted and done if they
  - » Enable a high priority project or an initiative already under way e.g. renovations
  - » Need to be done to assess resourcing cost of remainder of project

OUTCOMES OVERVIEW: DEFERRED

- Complex projects often may:
  - » Need to be approved at multiple levels within the University
  - » Have funding requirements exceeding Library capacity
  - » Contain multiple parts, which could be done as stand alone projects
- Can be revised and/or resubmitted in future

EXCELLENCE•CANADA
improving performance, recognizing excellence

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GOING FOR SILVER CERTIFICATION

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PEOPLE ENGAGEMENT DRIVER

People engagement examines how people are treated, encouraged, supported and enabled to contribute to the organization's overall success. It includes the wellness of employees and their families including mental and physical wellness and a safe environment

MEMBERSHIP

- Sarah Martin & Nick Richbell
- Mary Lynne Bartlett
- Rachel Figueiredo
- Sam Gibbon
- Al Smith
- Stef Voichita
- Liz Wehner

WHAT ARE WE LOOKING AT?

- HR and Wellness Plans
- Recruitment
- Job descriptions
- Managing employee performance
- Leadership
- Employee training
- Voice of the Employee
- Feedback process
- Measurement of internal customer satisfaction

WHAT HAVE WE FOUND SO FAR?

- HR and Wellness plans are in place but these need to be better communicated to the Library and Campus community
- Both the Library and the Campus have a system in place for recruitment. Is it “effective”?
- The Library has good onboarding tools but we are unaware of the Campus wide onboarding process that is being developed

WHAT HAVE WE FOUND SO FAR?

- We have access, at the Campus level, to job descriptions – are they “current”?
- We have a good system in place for managing employee performance but are the ratings meaningful?
- A “Voice of the Employee” survey is needed at the Campus and Library level

CHALLENGES & WHAT'S GONE WELL

- It's a large topic with lots of small pieces to talk about
- Commitment of several months
- Questions about vocabulary and phrasing in EC official documentation
- Group's engagement in the topic has made for lively and well-thought out discussions
- Potential to be involved in ongoing planning and implementation

NEXT STEPS?

- Informal drop-in, Friday, January 15th from 09:30 am to 11:30 am in LIB 428
- Unable to attend the drop-in event?
  - » Flip charts with the driver's information will be made available in both the Porter and Davis staff lounges for a period of time.
  - » Please feel free to add your thoughts, comments or questions. We will communicate the dates shortly

NEXT STEPS?

- The group will have finished discussing the 9 elements in this driver by early February
- EC Steering Committee will evaluate our findings and review what work is needed at the Campus level vs. the Library level in order to achieve Silver certification

NEXT STEPS?

- The driver's working group will communicate our findings to Library staff
- Small working groups will be formed with members of the current driver team and other staff interested in filling the gaps found during this interesting and challenging process

EXCELLENCE CANADA UPDATES & NEXT DRIVER

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MORE SILVER DIFFERENCES

- Mix of consultation, then documentation, then spinning up new areas, more documentation, final consultation and revision
- Opportunities for driver teams to get involved in new work to meet requirements
- Finer coordination with campus

CAMPUS UPDATES

- **Nov-Dec:** New Academic certification stream under development by EC
- **December:** Math and Applied Health Sciences submitted their certification documents
- **January:** OHD, Human Resources, Office of the President, Office of the Provost/VP Academic starting

“GOING FOR SILVER – ACADEMIC”

- New certification stream combining Bronze and Silver requirements
- Aligns language with academic environment – “Service Excellence” replaces “Customer Experience”
- Most units going forward on campus at uWaterloo will use this
- We will assess and may switch

STRATEGY & PLANNING

- Second driver, starting March 2016
  - » Organizational strategic plan
  - » Balanced set of key priorities and measurable goals, with stakeholder input
  - » Baseline indicators to measure performance against goals are established and monitored

STRATEGY & PLANNING TEAM INVITATION

- Library Managers and MAP3 participants: core team
- Additional staff, student representation

- If you are interested, please send me an email!
  - » pvcalarco@uwaterloo.ca

DRIVERS 3-6 PLANNING

- Service Excellence: perhaps third driver
- Partners & Suppliers
- Process & Project Management
  - » Coordinate with campus Quality Assurance/Lean developments
- Leadership & Governance
  - » Opportunity to involve new UL?

Q&A

LIBRARY REVITALIZATION

Phase 1

DC Critical Areas

DP 3rd & 5th Floors

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CONTEXT

- First phase of multi-year Library Revitalization
- Scope:
  - » DP 3rd Floor
  - » DP 5th Floor
  - » DC Critical Areas
- Campus Student Space Priorities

Recent Renos

2004 - DC major renos
2005 - DC Silent Study
2005 - Musagetes Opening
2005 - Sims Reading Room
2008 - DP main
2012 - DP Ober Study
2012 - DP Geospatial
2013 - DP 6th Floor

CORE TEAM

- Annie Belanger
  Project Lead
- Sue Burns
  AODA Consultant
- Carl Nagel
  LTFS Consultant
- Graham Yeates
  Admin Support

Sub-Project Team Co-Leads

- Sarah Brown
- Anne Fullerton
- Rebecca Hutchinson
- Nadeem Lawji
- Alex McCulloch
- Adam Savage

CORE TEAM ROLES: SUB-PROJECT TEAM CO-LEADS

As Core Team:

- Project plan, communication plan, and other plans
- Budget development and tracking
- Timeline
- Consultation & focus groups

For the sub-project:

- Team staffing and coaching
- Project tracking and communication
- Consultation with end-users and staff
- Participate in Advisory committee

CORE TEAM ROLES: CONSULTANTS

AODA Consultant

- Accessibility best practices:
  - » Universal design for space & learning
  - » Customer service
- Accessibility in services, technologies and resources
- Leads consultations with AccessAbility Services users

LTFS Consultant

- Facilities and Technologies Operations best practices
- Leads staff relocation planning and implementation
- Liaises with Plant Operations

SUB-PROJECT TEAMS & ROLES

- A team for each sub-project
  - » Defined and formed before project begins
- As members:
  - » Actively participate in the development, planning, implementation of the sub-project
  - » Leads, if applicable, specific area of accountability

OPPORTUNITIES FOR ENGAGEMENT

- Surveys
- Furniture charrettes & prototypes
- Ethnographic interviews
- Focus groups
- Feedback online
- Open houses

LIBRARY REVITALIZATION ADVISORY COMMITTEE

Library Staff

- Sharon Lamont (Chair)
- Graham Yeates (Admin support)
- Core Reno Team
- Sarah Martin (Davis staff)
- Larisa Smyk (Porter staff)

Campus Partners

- Pam Charbonneau (Student Success Office)
- Maya D'Alessio (GSA president)
- Laureen Harder-Gissing (Alumni)
- Chris Lolas (Feds president)
- Rob Hartung (Design unit, Plant Ops)
- Scott Nicoll (Campus Space)
- James Skidmore (Faculty Member)

OUR TASK

Work together to provide:

- Guidance, support, informed opinions
- Insights from a broader perspective
- Dynamic communication
- Champion the project

HOW WE PLAN TO WORK TOGETHER

- Monthly meetings starting in February
- Advisory team reflects on documentation prepared prior to meeting
- At meetings, Core Reno Team presents developments to date
- Lively discussion ensues

GENERAL Q&A

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