

10-2021

## Shifting liaison involvement in collections: a holistic approach to managing the collection lifecycle. A toolkit from Charleston Pre-Conference 2021.

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### ScholarWorks Citation

Bélanger, Annie; Cadena, Cara; Jeffryes, Jon; and Lee, Marcia, "Shifting liaison involvement in collections: a holistic approach to managing the collection lifecycle. A toolkit from Charleston Pre-Conference 2021." (2021). *Presentations*. 98.

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# Shifting liaison involvement in collections: a holistic approach to managing the collection lifecycle

A toolkit from Charleston Pre-Conference 2021. Compiled by Annie Bélanger, Cara Cadena, Jon Jeffryes, and Marcia Lee.

## Articulate institutions values and goals around collections

### Activity One: Institutional Values (5 mins)

Values are often confused with beliefs, ethics, morals, and principles. They may overlap, but are not the same. Look to your institution's values but also reflect on your own personal values that you bring to your work.

1. Reflect on your top 3-5 values, the ones that are most important to you when it comes to working on a team. Be prepared to share why these are important to you.
2. Add your values to the table below.

Individual 1	Individual 2	Individual 3	Individual 4	Individual 5
1. Value	1. Value	1. Value	1. Value	1. Value

Different words will mean different things to different people. It is important that whatever words we choose to describe values, we understand and articulate what we mean by the word, what it gives us, and what it looks like 'in action'.

## Activity: Group Values (25 mins)

As a group:

1. Review and share your institutional values with your group members. Ask clarifying questions to understand what the values mean.
2. Identify themes or overlapping values
3. Select five shared values that are most important to our work
4. In the table below:
  - a. Select a word to represent the shared value
  - b. Create a working definition for the value
  - c. Identify individual and team behaviors and actions that support the achievement of that value

<b>Value</b>	<b>Working Definitions:</b> How do we explain what this value means to a new colleague?	<b>Actions to Live it:</b> How do we demonstrate this value well in our work to our users and colleagues?

### Reporting out:

When we regroup, be prepared to:

1. Report out on one value, including working definition and actions to live it

# Deeper Dive: Values Exercise

You might consider taking this template back to your institution and filling it out with your colleagues.

License Term	Value
<b><i>Nondisclosure Agreements</i></b>	<i>Integrity, innovation, community</i>

\*adapted from Scarlet Galvan’s *Non-negotiable: Mapping the standards-driven license agreement*.



# Drafting Design Principles

## Designing Design Principles – A Group Process

Annie Bélanger  
June 2021

### What are design principles?

Design principles act as a compass for the sought outcome(s). They are important because they help us to make decisions. They serve as guideposts as we move forward. They ensure we are on a spectrum of agreement as to what we are doing and how before, during, and after. They foster constructive dialogue when comparing solutions to determine which is most appropriate and to explain the decision.

Design principles should be specific, nuanced, and actionable. These principles should be foundational, established before we create a process or deliverable. They should be used to question if the deliverable upholds the principles. They will help us ensure that the original intention and needs of our work are documented, upheld, and live beyond transitions.

### Why not guiding principles?

"Guiding principles" are the broad philosophy or fundamental beliefs that steer an organization, team or individual's decision making, irrespective of the project goals, constraints, or resources. Design principles are targeted principles that act as value statements that frame our decisions about what we will design (create, build) an outcome.

### What makes a good design principle?

A good design principle:

1. Takes a stand on what values are important
2. Articulates why it is important
3. Is unambiguous in its meaning
4. Is simple and pithy – 1 sentence – yet not too obvious
  - a. Uses working definitions to add to
5. Inspires by being relevant and memorable
6. Avoids conflicting with another

## Process

### Start with values

Answer the values essential to a successful outcome

- Individually, identify up to 5 phrases that highlight the value of this work and the values it upholds
- Share these – ask clarifying questions
- Identify patterns of resonance and dissonance
- Discuss
- Agree on the clusters – and create cluster titles

### Move on to why

Prepare by answering:

- Answer – what are these design principles for? Who are they designed for?
- Consider – If we were to onboard a new teammate tomorrow, what are the most important things they should know?

## Design Principles Exercise

- Individually, draft top 5 design principles for collection management policies. Write them on a piece of paper (or online equivalent). (5 minutes)
- Depending on the size of your working group, either all together or in small groups (25 minutes - longer the larger the group)
  - Share your individual principles, ask clarifying questions
  - Identify patterns of resonance and dissonance as well as clusters
  - Discuss, agree on common themes
- (Optional) Return to large group and share (5 minutes)
- Draft your design principles

## Resources

Want to know more: <http://www.uxforthemasses.com/design-principles/> or <https://usabilla.com/blog/design-principles-finding-writing-living/>

# Planning Communications

## Communication Plan Template

# <Title of Project> Communication Plan

Context: *Insert the project context*

### Main Speaking Points

- Item 1
- Item 2

### Questions to be determined:

- Question 1
- Question 2

Stakeholder Group	Communication Needs	Medium/ Approach	Frequency & Timing	Responsible
Libraries Faculty and Staff				
External Unit, College, or Department				
Campus Faculty				
Libraries Department/Location				
Student colleagues				
Non-libraries campus partners				
Community Users				