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In August 2018, Leeds Beckett University implemented the Talis Aspire Reading List system. The Collections and Acquisitions team faced the challenge of both the implementation of a new system and the impact on library acquisitions. The team took on this challenge and used it as an opportunity to examine current acquisition workflows and procedures using continuous improvement methodologies to make significant improvements. Using both their creative thinking and many years of acquisitions experience, the team created an operational workflow using an online shopping approach that took advantage of new technology and features provided by Talis, as well as complimented existing practices.

This article will discuss our historical reading list procedures, the challenges and achievements of changing these processes, as well as the future sustainability of this workflow. By examining the outcomes of the project and what was learned by the team through this process of change, readers will gain some insight into a systematic acquisitions approach to the implementation of a new reading list system.

Background

To provide a bit of context to reading lists at Leeds Beckett University. In 2013, we chose Rebus:list as our reading list system, and in 2014 we inputted our very first reading list into the system. (Blue Plaque image)

At the same time, a central fund was created, called Share-B, for all reading list items, so an order is not tied to a specific subject fund as it had been in the past. Some subject areas retained separate smaller funds for Collection Development purposes or to address any specific requests from academics.

At the end of 2016-17, nearly three years after we inputted our first reading list, all reading lists were added into the system with an achievement of 97% coverage across the University. It is important to note that our VLE (Blackboard) is administered by the Library, which makes it a bit different to other universities where it is under the remit of IT Services. This level of access to the VLE has enabled us to achieve such notable results.

In 2018-19 we had a total of 4,722 reading lists. This academic year 2019-20, we currently have 4,031 reading lists. The discrepancy is due to the natural lifecycle of a module, where some are cancelled, suspended or subsumed into other modules to create a larger module.

Now, this takes us to last year, where we chose a new reading list management system: Talis Aspire.

Implementation of Talis Aspire

As a team, rather than the impending sense of doom that most view implementations, we decided to view this as an opportunity to examine our internal processes as well as to ensure we are still providing the best service to our users.

This fact meant that throughout the implementation, we needed to understand and keep firmly in mind, who and what will be affected. Concerning our team and the acquisitions processes, we defined these as following:

- Who: our key stakeholders

- What: Reading List and Acquisitions processes

To address the 'Who?', we decided to concentrate on the key external stakeholders (outside of the Library but within the University) who would be most affected: the students and the Academics/Course teams.

Based on some of the literature and discussing this with colleagues at other institutions, we concluded that it is the Academics or course teams that are the lynchpin to the reading list process.

Why? Because students will do what their lecturer instructs them to do: if the lecturer says do not use that online reading list, use this print one, students will use the print one. As a result, we were keen to get the academics on board with the new reading list system, as previously academic engagement was lower than we expected.

Online Shopping Approach

When thinking about reading lists and academic engagement, the question was: when do academics engage with their reading lists? We found it is usually at the beginning of the academic term and usually when they want to order new resources.

With this in mind – to provide a 'carrot' to reading list engagement – we decided to use an online shopping approach to resource acquisition for reading lists.

So, in simplified terms, if new resources are required for a course, the academic must add it to the appropriate reading list(s). This action would automatically trigger our acquisition processes.

Some of the benefits of this approach are familiarity with the online shopping experience. Browsing through Amazon, for example, and choosing items to put into an online shopping cart. However, in our case, the reading list is the 'shopping cart'. Once this becomes a less daunting prospect for the academic, it can turn into the starting point of more in-depth conversations regarding the pedagogy of the list itself.

Also, this approach provides contextualisation of the acquisitions process: for the Library, in terms of purchasing texts for the correct reading lists, and for the academics, who become more active participants in the acquisitions process.

Reading List and Acquisitions Processes.

With the key stakeholders identified, our internal processes were next to be examined in order to achieve the desired outcome. As a result, the Talis Orders Workshop Project (TOW Project) was created to examine this more closely. This project consisted of both Collections and Acquisitions team members. Our team have used Continuous Improvement (CI) methodology successfully in the past, so the project team decided to use the CI Cycle as the basis to examine our workflow: Identify, Plan, Execute and Review.

As a result, we created a project roadmap as a guide for this process.

- Map out current processes
- Areas of improvement
- New technology

- Create the Workflow

Map out current processes

To map our current processes, we used a process mapping exercise that included both the Collections and Acquisitions teams. Our objective was to identify critical elements of the current collections and acquisitions ordering processes for reading list items. Another goal was to identify the process or workarounds taken for granted and not recorded. These workarounds would enable us to identify critical areas of improvement quickly.

One surprise benefit of these workshops was the amount of knowledge sharing that occurred between members of the team. This knowledge included sharing best practice between experienced and less experienced members of staff, as well as providing a 'safe place' for peer support for specific technical issues. This practice has become embedded with regular cross-campus team meetings within Collections to discuss any issues arising with the processes.

Areas of Improvement

Once the entire process was mapped out, we could start to interrogate the workflow to identify areas or processes that could be improved. What we found was:

- Lack of module information provided, i.e. module codes, student numbers
- Duplication of work, i.e. reading lists are checked multiple times
- Long decision-making time, i.e. the length of time for decision-makers to reply to queries
- Needless process, i.e. why do we do it this way? I don't know, we always have.

New Technology

Once areas of improvement were identified, we investigated whether the new technology was available within Talis Aspire or if new university systems could help.

One example we used was the Amazon API within the Talis Aspire bookmarking tool to enable the online shopping experience for texts as discussed above.

Another example was using student numbers taken directly from the Student Registry system (Banner) via the Business Objects reporting system and uploading them directly into the reading list system.

Using the supplier integration within Talis Reviews (the acquisitions module) which would enable us to make rapid purchasing decisions, as the student numbers are directly tied to the reading lists,

Moreover, for the first time, our team had a broad overview of our current library collection via Talis Reviews.

Create the Workflow

The final step, the 'scary bit', was creating the workflow. Based on both our process mapping workshop and research of the technology available, we decided on the following:

- Keep it simple with no overcomplicated processes
- Reading list items are ordered directly via reading lists
- We would use Banner as the single source of truth for student numbers.
- We would use a purchasing ratio created jointly with our Academic Support team.
- Streamline our processes including Out-of-print, PDA/DDA as well as Digitisations into the reading list acquisitions workflow.

Results of the Implementation

We now had a streamlined reading list acquisitions process where lists were checked systematically, and orders were processed more quickly.

Ordering via Talis Aspire was a benefit for academic engagement. This is demonstrated in Figure 1, where we compared the number of lists published in the same period both this year and last year. On the right we have last academic year (2018-19) with 228 lists published compared to this year where we had 794 lists - 4x as many lists published.

For the first time, we had zero items on our high-demand report in the first term - our high demand report triggers the acquisition of more copies of texts that have a high number of reservations. So, it is significant that we had no items on this report during our first term.

We had increased engagement by both students and staff (Figure 2.). On the left, we have the number of page views and unique page views for 2017-18 compared with the previous year's stats. So, the number of page views went up 400% and unique page views when up nearly 700%. This is a significant increase in engagement, even considering some of the variables in switching systems and measurement of analytics. It will be interesting to see how this compares in future years.

From a more qualitative side, was the knowledge sharing between Collections staff I mentioned earlier. Library staff also felt more empowered, especially in acquisition-based decision-making processes and felt that they had an impact on the quality of the list. For example, the most recent editions were acquired and added to the reading lists, so resources were up-to-date and reflected a current and relevant library collection.

Lesson learned

As with all implementations, there were some lessons learned.

Based on our previous implementation of a reading list system, we assumed a marginal increase in engagement, especially as we do not have a reading list mandate at a senior level in the University. The resulting success of these changes did create an increased workload for Collections staff. As a result, it is essential to note that increased engagement does require increased support for staff - something that was acknowledged by our Library senior management.

Another essential point is managing staff and student expectations, for example, emphasising that ordering books for a module is a part of a more extensive acquisitions process for an academic library.

Lastly, technical issues, hat become painfully apparent when different systems try to work together. These included problematic bookmarking, dropping connections with the Library's LMS and duplicate 001 fields to name a few.

Conclusion

Overall, the impact of these changes has been overwhelmingly positive, and we have had enthusiastic feedback from key stakeholders about how these changes have helped them. One academic emailed the following: 'As always this is a great facility and makes it really easy to provide access for students to resources.' Because we had already examined our practices, we were also able to adapt quickly to sector changes such as university budget cuts. Internally, it has fostered a culture of continuous improvement within the team to ensure we are providing the best service for our customers, both university staff and students.