

Knowledge IQ

Fostering knowledge sharing among liaison librarians



Many academic libraries operate under an old-guard mentality and are notorious for resisting change. Some might say this is not true: Libraries are transforming from stockpiles of books to social spaces for collaboration, innovation, and creativity. They are becoming increasingly progressive in their approach to serving students, faculty, and the community. Yet by and large, libraries are not evolving with regard to their employees.

Fundamental tenets of knowledge management can help your library gradually move from humbug thoughts such as, "That's just how we've always done it!" to more affirming ones like, "There are new, improved ways

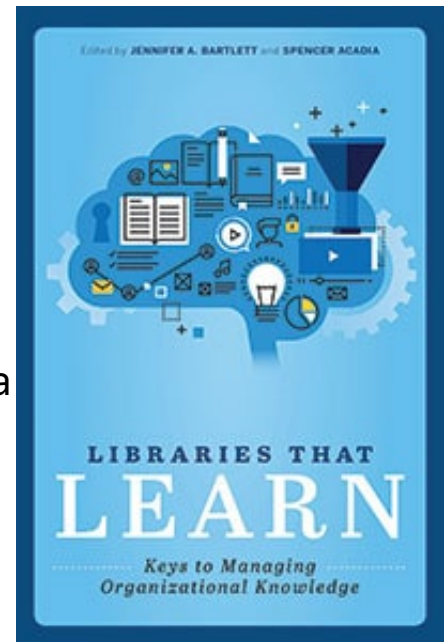
we can try with an open mind." This transformation depends largely on creating an organizational culture that is open to sharing knowledge, strengthened with employee buy-in, and promoted by human resources. The overarching challenge for implementing knowledge management in libraries: transforming an existing, dysfunctional culture into a new, functional one.

Another reason knowledge management fails in libraries is that librarians are accustomed to warehousing information for its own sake. This behavior is best illustrated by traditional collection-building efforts, in which libraries feel compelled to routinely acquire books, journals, and other materials just in case someone wants them.

However, this method does not work. Libraries must determine which knowledge is most important. Only the knowledge that best serves the purpose of the library's strategic plan, mission, vision, goals, and objectives is relevant.

Lost in the shuffle

Everyone is familiar with the experience of not being able to easily locate a needed manual, directory, policy, procedure, report, form, or set of instructions. Files are deleted or misfiled; manuals and websites become outdated; longtime employees leave and take their experience with them. Why do many libraries find it so challenging to gather and use organizational information? Librarians and other information professionals spend their careers selecting, classifying, and disseminating knowledge—why should our own internal organizational knowledge be any different?



This is an excerpt from *Libraries that Learn: Keys to Managing Organizational Knowledge*, edited by Jennifer A. Bartlett and Spencer Acadia (ALA Editions, 2019).

Organizational knowledge in libraries is not concerned with the information that librarians make available to external users; rather, it involves the processes and procedures implemented to effectively manage a library's internal organizational knowledge—the stuff that library employees know and do within and for the institution. The irony is not lost on us that we, who are often championed as knowledge gatekeepers for others, are not ourselves trained to manage workplace knowledge.

Sharing knowledge and information in the workplace significantly affects an organization's ability to operate effectively and efficiently. Among the various types of workplace learning, tacit knowledge is one of the most difficult to codify and share. Considering that most workers switch jobs and careers multiple times, organizations must think about how tacit knowledge is shared, particularly in cases of employee turnover. Building a community of practice (CoP) can help.

What is a CoP?

The CoP concept was first introduced by Jean Lave and Etienne Wenger in *Situated Learning: Legitimate Peripheral Participation* (Cambridge University Press, 1991). Wenger later described CoPs as informal clusters of people focused on a common interest who learn through participation in a group. They promote informal learning and especially excel at sharing tacit knowledge, the capture and coordination of which is notoriously difficult.

CoPs are a vital element of a successful knowledge management strategy and should be recognized and nurtured. These groups function most effectively when not bound by formal rules and procedures. Their focus is on day-to-day problem solving and idea generation. To maintain the group's dynamics, appropriate institutional support should minimize disruption and formal oversight. The challenge is to acknowledge these groups' loosely

defined nature while leveraging their knowledge and expertise.

CoPs are not without risk. They should not devolve into groupthink, in which employees act in homogeneous, nonindividualistic patterns and suspend critical thinking and moral judgment. Groupthink may also lead to toxic and unproductive behaviors, such as habitual complaining, conflict, and the derailment of progress.

Forming a community

To help liaison librarians share knowledge with each other, the University of Pittsburgh's University Library System (ULS) organized a CoP eight years ago at its Oakland campus. The CoP comprised more than 25 liaisons—broadly defined as anyone responsible for working with a specific academic unit on campus. Liaisons were loosely organized across different library units, without a central chain of command or the formal coordination of reference or instruction services.

In spring 2016, a new staff position was created for an instructional designer to work with ULS liaisons. Three new liaisons were hired at the Oakland campus, all of whom were new to academic libraries. During the onboarding process, we observed the following.

First, predecessors' files were not always available to their replacements. While some outgoing employees left notes and files behind, others left nothing. In some cases, liaisons had to build their own instruction, reference, and outreach materials from scratch with little or no record of prior work. Second, ULS had no structure to encourage sharing or collaboration among liaisons. Liaisons would know if colleagues were receiving similar questions or implementing similar outreach strategies only through informal conversations or serendipity. Neither challenges nor

successes were shared internally among liaisons or with the larger ULS community.

Although CoPs are meant to be informal, the ULS director issued approval to explore forming a CoP. About 50 librarians were invited to an exploratory meeting to discuss CoPs and their possible benefits. Meeting attendees were eager to start a CoP in hopes of improving liaison communication and knowledge sharing. The newly formed CoP agreed to hold monthly meetings for discussion, reflection, and camaraderie in a safe, supportive environment. The meetings covered specific topics such as keeping up with library-related research and trends, writing learning objectives, planning orientations, sharing lesson plans and activities, and incorporating active learning in sessions—all focused with liaison roles in mind.

Between meetings, a Slack channel allowed participants to communicate with the entire CoP group or individual members. However, Slack—a cloud-based application used for collaborative project work, including real-time chat—was not successful. While instant messaging and chat tools are widely used for virtual reference with library users in many academic libraries, research by Ian Chan, Pearl Ly, and Yvonne Nalani Meulemans in “Extending IM Beyond the Reference Desk: A Case Study on the Integration of Chat Reference and a Library-Wide Instant Messaging Network” (*Information Technology and Libraries* vol. 31, no. 3, 2012) argues that librarians have little interest in using these types of tools outside of reference to share workplace knowledge. This was true with the ULS CoP, whose members preferred to communicate in person or via email or shared drives.

In addition to its meetings, the ULS CoP also hosted its first lightning talk event in 2017, in which liaisons spoke for five minutes each on something they had accomplished over the past 12 months. Most of the talks focused

on instruction and outreach efforts, such as using special collections in instruction or introducing PlumX analytics to academic departments. Informal feedback indicated that the talks were well received and will likely continue.

Building a repository

The CoP needed a place to share meeting notes, slides, and resources. Since all liaisons were familiar with Springshare LibGuides, one was created specifically to share materials. But as time progressed, it became increasingly difficult to navigate the guide because of the large number of files in it. Also, liaisons had a hard time finding materials they needed because of poor search functionality and a lack of tagging and metadata. The liaisons preferred not to use open repositories like Project CORA and Association of College and Research Libraries' *Framework for Information Literacy Sandbox*. An internal solution was needed.

ULS maintained a SharePoint server, but most liaisons found it to be nonintuitive. Box, an enterprise content management system offering cloud storage, became the preferred choice because most of the liaisons already used it for personal documents and other projects. Box was convenient for file-syncing, and files were accessible from any location or platform. Box also allowed for tagging and metadata.

To establish the Box repository, a generic, ULS-sponsored account not belonging to a specific individual was used. By choosing a sponsored account as the host, there was no worry about the repository depending on an individual's employment at ULS or the university. Liaisons in the CoP were invited to view, download, search, and upload content.

To enhance search and filter functionality within the repository, a custom-

made metadata template was created with ULS's IT department. In creating the template, all files in the LibGuide repository were examined and a list of attributes and descriptors was developed. Careful thought went into creating the metadata, since it would determine how usable the repository would be. In fact, ULS's metadata librarian was consulted as an expert on this part of the project.

The metadata template included attributes for ACRL's *Framework for Information Literacy for Higher Education* and its *Information Literacy Competency Standards for Higher Education*. Doing so helped liaisons organize and locate files because specific lesson plans and activities could be mapped to individual frameworks or standards.

Challenges and benefits

Cultivating a group atmosphere in which liaisons took the initiative to lead and actively participate in the group was a significant challenge. The liaisons were eager to come together, but shy about sharing knowledge and concerned how that knowledge—or lack thereof—would be perceived by others in the group. To allay social discomfort, liaisons were encouraged to talk about their specific experiences. When possible, liaisons were asked to contribute these experiences beforehand to reduce feelings of being put on the spot.

Many participants expressed gratitude for having a space dedicated to discussion and collaboration. At ULS, as with other libraries, organizational communication can always improve, and liaisons enjoyed the opportunity to meet physically and virtually. Also, because of the CoP, liaisons have tried new methods and tools, such as using a *Jeopardy!*-inspired game with students for information literacy and creating stakeholder profiles for developing new potential services.

Librarians are not always adept at applying their valuable skills to their own libraries. Organizing and maintaining internal institutional processes, procedures, and knowledge remains a challenge, and dealing with it is paramount if libraries are to survive as useful organizations. Knowledge management practices and processes need to become as ingrained in library practice as cataloging and classification, reference service, and information literacy are.