Unified Library Management System

Working Group Leads Meeting
September 2015

All about leadin'

- Roles
- Responsibilities
- Expectations

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Role of Working Group

- Success of this project turns in large part on consortium functionality
- Working groups provide forum for making recommendations concerning consortium functionality (= Network Zone)
- Project managers focused on local concerns

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Role of Working Group Leads

- Liaison between staff participating in Working Groups and CSU Implementation Team, Ex Libris and deans
- Facilitate recommendations and best practice creation within the working group
  - Frame issues
  - Formalize recommendations
  - Moderate discussions
  - Lead best practice crafting

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Project Communications

Working Group → Working Group Leads ↔ CSU Implementation Team ↔ Ex Libris
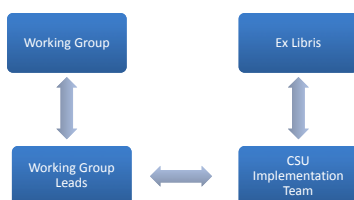
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ULMS Decision Making Philosophy

- During project implementation decisions regarding use of the system will be made
  - **Strategic decisions** regarding long-term direction of the ULMS made by deans (policy)
  - **Operational decisions** regarding daily use of the ULMS made by Implementation Team (procedure)
- Local decisions are made at the campus level
 - Working groups focus on system-level decisions
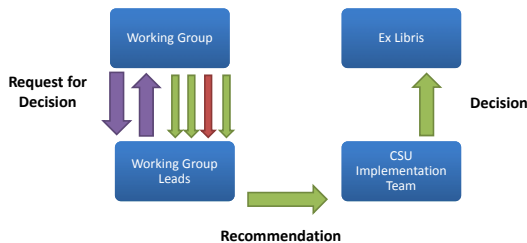
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Working Group Recommendation Process

- Questions/Issues affecting systemwide implementation may stem from Ex Libris, CSU leadership or Working Groups
- Discussions around issues occur within working group(s)

From Ex Libris

Discussion — Request for Decision — Decision — Recommendation

Working Group / Ex Libris / Working Group Leads / CSU Implementation Team

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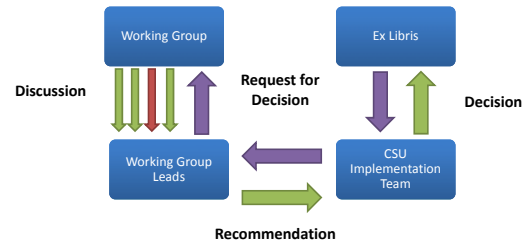
From Working Groups / campuses

Request for Decision — Decision — Recommendation

Working Group / Ex Libris / Working Group Leads / CSU Implementation Team

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Working Group Recommendation Process

- Leads' role:
  - Ensure mutual understanding of recommendation
    - What the question/issue is
    - What the recommended answer should look like
    - What timeframe the recommendation needs to be made in
  - Keeps discussion within bounds & on-track , focused towards end-product
  - Identifies additional information needed to make recommendation
  - Makes recommendation to Implementation Team based on working group discussions

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Best Practices

- Defining and creating techniques or methodologies to facilitate effective collaboration using the ULMS
- Identifying common processes, procedures and policies for working collaboratively within the ULMS

Best Practices (cont'd)

- Leads' role:
  - Identifying uses of the ULMS within their functional area that would benefit from creation of best practices
  - Organizing best practice creation
    - Prioritization
    - Who creates procedures within group
  - Verifying best practice
  - Recommend best practice to Implementation Team

How to be an effective lead

- How to manage conversations regarding issues or best practices
  - Keep discussions on topic
  - Encourage responses for diverse opinions
  - Note if other working groups should be in the conversation
- How to manage conversations gone awry
  - Bring group back to the original topic if off-track
  - If off-topic discussion is valuable, consider a new subject line for that topic
  - Suggest that an off-topic conversation go off-line
- How and when to participate in conversations
  - Use your voice to probe and ask clarifying questions
  - Summarize what has been said
  - Encourage those who have not responded to do so if there seems to be only a few dominant voices
  - Remind the group of an approaching deadline
  - State the recommendation that will be forwarded to the I-Team

From ULMS Listserv Rules of Engagement: https://calstate.atlassian.net/wiki/display/ULMS/Listserv+Rules+of+Engagement

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How to be an effective lead (cont.)

- What information to send to the Implementation Team, when to do so
  - Send summarized response to a topic by the deadline
  - Send issues (with context) that have arisen from the group that need input from the I-Team
  - Notify the I-Team as soon as possible if other groups need to be involved in the conversation
- Keeping things on track – systemwide vs. local choice
  - Keep a log of recommendations
  - Keep discussions on issues/best practices that affect multiple campuses in terms of overall system configuration, policy determination or collaboration

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Chancellor's Office Staff

- David Walker
- Brandon Dudley
- Alice Kawakami
- Jessica Hartwigsen
- Ying Liu

- Data Migration Specialist
- Workflow Redesign Specialist

- Role: Project Support & Leadership

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Coming up

- Coming together as a team
  - Selecting a chair
  - Setting an agenda
  - Developing Best Practices

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How to be an effective team member

- Being able to commit to a shared goal
- Being able to listen and respond to others in an objective and productive way
- Being open and honest with one's ideas, concerns, and values
- Being able to be a leader as well as a follower
- Being sensitive to the needs and feelings of other members of the team
- Not carrying hidden agendas into team projects and tasks

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Collaborative team roles

Chair
- Facilitate group work
- Give directions
- Review instructions/requests
- Restate group goals
- Call attention to time limits
- Generate responses

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Working together as a team

Setting an agenda
- Topics from Spring regional meetings as a stimulus

Best practices
- Procedures, policies, processes

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