

Shields Library Intranet Project Case Study

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Shields Library is the main branch of the library system at the University of California, Davis. While the library benefits from being part of the wider University of California system, which collectively houses the largest research library in the world (Economic and Planning Systems Inc., 2011), Shields faces many challenges great and small. Among these challenges is the need to adapt to new technologies in the fight to remain relevant and better serve patrons' needs.

Recently, Shields has undergone a major update to its public-facing website, changing not only the visual design but also offering greater functionality for users. After this update, the library's Online Strategy department has now turned its gaze inward and has begun working on an Intranet, a private site for staff to use for job-related information. The Intranet will replace an existing wiki that was made roughly ten years ago. The wiki was intended to serve a similar function but quickly fell into disuse. The challenge for this new project will be to avoid that fate and build something staff will keep referring to and interacting with in another ten years.

What follows is a detailed analysis of the Intranet project's progress so far, including: a description of the wider organization, its strategy, mission, and culture; the environment it finds itself in, including major changes confronting the organization; the context behind the Intranet project; the strengths, weaknesses, opportunities, and threats relevant to the Intranet project; and recommendations moving forward.

Shields Library Strategy, Mission, and Culture

Shields Library has always been one of the most important institutions at UC Davis. It was one of the first buildings erected at what would become the UC Davis campus in 1908, when the university itself was still just a satellite farm school for UC Berkeley known as the University

Farm (“History of the Library,” 2017). Indeed, many of the books held at Shields still bear that name on their property stamp. In 1948, the first commencement ceremony for a four-year degree at UC Davis was held in the library’s courtyard, highlighting its importance to the campus (“History of the Library,” 2017).

It has been said that the library is the heart of a school (Portwood, 1936), and this is reflected in Shields’s mission, vision, and values statements: to “collect and steward the university’s contributions to knowledge and society,” to be “the academic hub of UC Davis, advancing research, education and innovation in a networked world,” and to be “a broadly collaborative and client-centered organization that values high quality scholarship, learning and service to our community” (“Mission, Vision, Values,” 2017). The values embedded in these statements are lived by the library’s staff. Many staff members have been with the library in some capacity for twenty, thirty, even forty years (“UC Davis Library Personnel Survey,” 2017). More than a few began their employment as student assistants and will retire from the library in the coming years. They have deep knowledge of library policies and procedures and a dedication to the library’s success, evidence by the fact that retirees regularly return for the Winter Potluck and other social events.

Notwithstanding the dedication of its staff, Shields has undergone some major changes over the last ten years. The financial crisis of 2007 to 2008 severely impacted the university’s budget on several fronts, resulting in furloughs for staff members and a soft hiring freeze that lasted several years (Jones, 2009), creating significant disruptions to how the library operated. Retirements and other separations during the hiring freeze meant that some departments were forced to merge, reorganize, or close entirely. Worse, the University Librarian – whose function is similar to that of a CEO – retired in early 2009 and the library was forced to make do with a

series of Acting and Interim University Librarians until 2012, when the position was permanently filled by MacKenzie Smith.

Smith has worked to revitalize the library with new hires and new initiatives, but after a multi-year period when departments were in flux and units often operated with acting supervisors, when projects would be announced but halted halfway through or never even begun, some staff are understandably skeptical of senior management and reluctant to begin things they think might be canceled (Anonymous, 2017). A recent personnel survey showed that only a plurality (40 percent) agreed that senior leadership was effective, while another 37 percent remained neutral (“UC Davis Library Personnel Survey,” 2017). Additionally, in the same survey, a significant minority (30 percent) stated that the library’s mission and goals were clearly defined and communicated only “sometimes” or “rarely.” This combination of dedication to the library as an institution and skepticism of its change leaders creates an atmosphere where routine tasks are still carried out and prioritized, but new goals and changes to procedures can sometimes be ignored until staff are sufficiently motivated (Anonymous, 2017).

Changes Confronting Shields

According to Pew Research Center (2016), despite a large majority of US adults expressing support for libraries, there is a gap between that support and their actual use. For instance, Pew reports that while 66 percent of US adults think closing their public library would have a major impact on the community, only 33 percent think it would have a major impact on them and their families. Similarly, according to that same report, 77 percent say libraries provide them with the services they need, but only 48 percent have actually been to a library in the last 12 months.

Part of the problem may lie in perceptions about what libraries offer versus what the public wants. Libraries are increasingly seen by the public not just as places to check out books, but also to access technology, use electronic media, and simply have a quiet place to study (Pew Research Center, 2016). Pew reports that 64 percent of US adults think libraries should at least maybe move some print books out of public locations to free up space for things like tech centers and reading rooms. Additionally, while many public libraries offer e-book loans, 36 percent don't know whether theirs does or not (Pew Research Center, 2016).

The senior administration and other decision makers at Shields Library are aware of these trends. According to its vision statement, Shields Library wants to be “the academic hub of UC Davis...in a networked world” (“Mission, Vision, Values,” 2017). To that end, Shields, and UC Davis itself, have undergone a number of initiatives in recent years to keep up with technological changes and changes in its patrons' needs. For instance, in 2011, the campus wireless networks switched over to eduroam, making it easier for traveling academics to access the network (UC Davis Information and Educational Technology, 2011), and in 2016, Shields began offering charging lockers, battery packs, and “power squids” for affiliated users to rent while studying in the library.

Also in 2016, the library began implementing significant changes to its online strategy, both in the front end and the back end. A major new database program was adopted, with a much more robust set of features, but this change required staff to spend several weeks in training sessions to relearn how to do much of their work (Anonymous, 2017). Additionally, certain systems staff relied on were not compatible with the new software, and new solutions had to be found. At the same time, a new online catalog was implemented, allowing patrons to more easily find material. The release of the new catalog system coincided with a major update to the

library's website, using the WordPress platform to make editing easier for staff members. The new website made it easier for patrons to contact librarians and get assistance, but it also made contact and biographical information about behind-the-scenes staff easier to find, causing some anxiety among staff members who valued their privacy (Anonymous, 2017).

The Staff Intranet

Origins in the Staff Wiki

The newest technological initiative at Shields is the Staff Intranet. The Intranet is based on the WordPress platform, like the public-facing website, and is intended to replace a wiki built on the MediaWiki platform. To understand the challenges facing the Intranet, it is necessary to examine the background of the wiki it is replacing.

The wiki was implemented in 2007 and has been active and available since. While all of the basic setup and coding was done by the Shields Information and Technology Infrastructure Services (ITIS) department, the majority of the initial content was created by a small group labeled the Wiki Task Force, made up of representatives from most of the major departments within the library. The wiki was then opened to all staff, with everyone given editing and page creation permissions to collaborate and help build the wiki further. Indeed, of the 155 active user accounts on the wiki, 112 have actually contributed in some way, whether by editing pages or creating them ("User List," n.d.).

However, the wiki quickly fell into disuse. Of the 786 pages on the wiki, most have only ever been edited a handful of times ("Pages with the fewest revisions," n.d.). An audit of one unit's pages in December of 2016 showed that many policies and procedures were out of date, and staff members who had left the unit were still listed in the contact information, while staff who had joined the unit were not listed at all (Anonymous, 2017). Furthermore, when the

Intranet project began in May of 2017, most pages across the wiki still discussed policies and procedures relating to the previous database system, despite having switched over to the new one almost a year prior. In the words of current Project Manager Neil Weingarten, “the vast majority of updates to the staff wiki were made within the first year it was spun up, and then pretty much nothing was done with it for a decade” (Weingarten, 2017).

Problems to Address

Several problems led to the wiki’s state of disuse. First, it was not a particularly intuitive platform. While simpler than HTML, wiki markup still has a wide set of rules users need to learn. In interviews, some staff members expressed anxiety about collaborating on the wiki because they believed they would need to learn how to program or write code (Anonymous, 2017).

Second, when the wiki was first set up, there was no long-term plan or strategy for it. Most of the pages on the wiki were simply copied and pasted from Microsoft Word documents on a shared network drive (“the S Drive”), and because the S Drive predated the wiki and was not going away, many staff continued to add new documents and update old ones on the S Drive while neglecting the wiki. The wiki was therefore largely duplicative of an existing solution, with no clearly communicated advantage or differentiation. Even with a small, internal project such as this, it is necessary to communicate differentiation (Kim & Mauborgne, 2004; Lovallo & Mendonca, 2007; Rogers, 2003).

Third, the wiki’s state of disuse encouraged further disuse. Newer staff members hired in 2015 report being told about the wiki during their initial onboarding, but that they did not find it useful (Anonymous, 2017). Indeed, one staff member specifically stated, “I found more of the information I needed to do my job in the various manuals and on the S Drive” (Anonymous,

2017). Another staff member went so far as to note that while they tried to use the wiki initially, “some of those pages were outdated or incorrect, which was sort of discouraging when I’d get corrected for following an old procedure” (Anonymous, 2017). Furthermore, the state of the wiki is not discussed during regular unit or department meetings. For the most part, it just sits there for staff members to work on if they know about it and have the inclination.

Strengths, Weaknesses, Opportunities, and Threats for the Intranet

The Intranet is likely to face all of these same problems. However, it has its own set of circumstances that may make this situation different. An understanding of the Intranet’s strengths, weaknesses, opportunities, and threats will help in providing recommendations for next steps.

Strengths

In terms of its strengths, the Intranet benefits from having more personnel dedicated to its success. When the wiki was created, the Online Strategy department did not exist. After the Wiki Task Force disbanded shortly after the wiki’s launch, there was no real central authority guiding its continued success. This time, the Intranet will be under the authority of Online Strategy, with a Project Manager, User Experience Designer, and Governance Group guiding it, and working with the assistance of the Communications and Marketing department to plan appropriate content and create a coherent visual theme. According to the Project Manager, the Governance Group will continue to monitor the Intranet and keep track of different sections to ensure that they are being used or to make a plan for them if they are not (Weingarten, 2017). However, the Governance Group will not do all of the work of maintaining the Intranet. Instead, it intends to employ the principles of adaptive leadership by “getting on the balcony” to observe and make

decisions, and then “give the work back to employees” by letting the Content Group and other employees create the actual content and perform other maintenance (Heifetz & Laurie, 2001).

Additionally, the Intranet will benefit from the WordPress platform, which supports a greater variety of features and is easier for general staff to learn how to use. Despite being a collaborative website, the wiki was relatively static and constrained in what it could offer users, leading to the continued dominance of the S Drive as the preferred platform. The Intranet will allow for greater interaction between users and the website, and between users themselves, through the form of dynamic, timely content and social features.

Weaknesses

Unfortunately, the Intranet will suffer from some of the same weaknesses as the wiki. Namely, there is still no plan for the S Drive to be retired in the near future, and so content on the Intranet may be as duplicative as content on the wiki proved. This is a difficult problem to avoid, as those with decision-making power over the S Drive’s fate are not necessarily the same people with power over the Intranet. Similarly, while the WordPress platform mainly uses a What You See Is What You Get (WYSIWYG) editor, and is thus simpler to learn than wiki markup, it may still be less intuitive than the Microsoft Office files currently in use on the S Drive.

Additionally, in interviews, some staff expressed the sentiment that the Intranet is just the current fashion, and if Shields moved on from a MediaWiki platform to a WordPress platform after a few years, then the library is just as likely to move on to some other platform in another few years when WordPress goes out of fashion (Anonymous, 2017). As a result, some staff may be reluctant to bother learning to use something they feel will just be replaced in a few years. On the surface, this sounds like staff are identifying Senge’s “illusion of taking charge” organizational learning disability (Senge, 1990, p. 20), but it may also be the case that staff

expressing this sentiment are masking feelings of vulnerability with regards to the rapid pace of technological change (Block, 2011).

Opportunities

According to the Intranet's Project Manager, one of the goals of the Intranet is to "make bonds" that lead to "more social interaction" (Weingarten, 2017). While some departments have social gatherings every few months, there are few opportunities currently for staff to simply get to know one another. Especially since hiring has gone back up in recent years, some staff reported in interviews that they don't even know many of their coworkers' names (Anonymous, 2017). To some degree, solving this problem was a goal of the revamped public-facing site. Staff were asked to have their photo taken and to write a brief blurb about themselves for the website so that patrons and coworkers alike would know who to talk to about different subjects. However, as noted earlier, some behind-the-scenes staff, whose jobs involve no direct interaction with the public, had privacy concerns and opted only to have their name and job titled listed, with no photo or biographical information (Anonymous, 2017). A private, staff-only Intranet offers the opportunity for some staff members feel more comfortable sharing information about themselves with their coworkers.

The Intranet also presents the opportunity to pull together several disparate sources of information and serve as a central hub for staff to reference. WordPress offers many plug-ins and other tools that allow it to interface with RSS feeds, email listservs, and other sources of information, creating blogs that update automatically and have content-relevant tags. These blogs would be easier for staff to reference than having to dig through each individual feed trying to find an announcement they may have forgotten.

Threats

The main threat to the Intranet is likely to be the S Drive. The Intranet is planned to launch near the end of September, and currently the majority of the content is made up of pages migrated from the wiki, many of which were originally just documents copied from the S Drive. Any content on the Intranet that is duplicated on the S Drive risks falling into the same disuse and eventual obsolescence as the wiki, as users continue to carry out updates on the S Drive, the platform that is most familiar and widely-used.

According to Diffusion of Innovation Theory (Rogers, 2003), the adoption of a new innovation depends on five factors: its relative advantage, its compatibility with current systems, its complexity, whether it can be tested on a trial basis, and its observed effects. The Intranet will need to have a clear advantage over current solutions, it will need to be compatible with existing workflows, it will need to be easy for staff to learn, staff will need to be able to try it out risk-free, and its benefits will need to be obvious once in use. If it does not meet these criteria, staff are likely to simply continue doing what they've been doing and not adopt the new platform.

Recommendations Moving Forward

This consultant has three main recommendations for the Intranet moving forward. The first is paramount – those involved with the Intranet must work on building its brand positioning (Grams, 2011). According to Grams, brand positioning is “the art of creating meaning for a brand in people’s minds” (2011, p. 11). While the Intranet will serve many functions, possibly the most appealing to users will be its social functions, helping staff find coworkers with similar interests and allowing units to share what projects they’ve been working on. This should serve as a focal point while initially “selling” the Intranet, thus creating mental distance from the idea that it is just the wiki in a new package or another way to duplicate the S Drive. If staff learn to

associate the Intranet with that core function, they may not only use it more often, but also talk about it more in person, helping strengthen the community around it.

Next, when the Intranet is launched, the library should offer a simple staff development course in how to use WordPress, as well as periodic refresher courses for new staff or staff who've forgotten how something works. People known to be involved with the project should attend the courses not just as instructors but also as students, to lessen anyone's feelings of vulnerability in having to take the course. It may be the case that staff who expressed sentiments about the Intranet just being the latest technological fashion are simply masking feelings of vulnerability, and understanding this will be key to overcoming their resistance (Block, 2011).

Finally, a strategy will need to be developed regarding the S Drive. It is recognized that decisions about the S Drive are outside the purview of the Intranet Project – though there is some overlap between the critical decision makers for both – but it will be important to draw a dividing line between the two. This may mean retiring the S Drive entirely and letting the Intranet absorb its purpose, but it may simply mean creating a set of clear guidelines about what kind of content belongs on one and what belongs on the other. While the Intranet has other functionality to offer, as long as it is duplicative in part, it risks being seen as duplicative as a whole.

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Appendix A: Letter of Agreement

June 6, 2017

Neil Weingarten
Project Manager
Online Strategy
Shields Library
University of California, Davis
100 NW Quad, Davis, CA 95616

Dear Mr. Weingarten,

As a graduate student in the Communications Management (MCM) program at the University of Southern California (USC), I am interested in studying the ongoing change process associated with the online strategy at the University of California, Davis, library system. The focus of my study will be on the migration from an internal staff wiki to a WordPress-based staff intranet. The purpose of this letter is to outline the scope of my project.

Goal of the Project

The goal of my project is to understand the ways in which a major technological change within a large organization is planned, implemented and communicated. I will be focusing on the ongoing process of migrating from the old staff wiki to the new staff intranet, although my project may also touch upon the recent changes to the public-facing website, due to the relationship between the two.

Timeframe of the Project

The project will be completed by Monday, August 14, 2017.

Separation of Roles

As a staff member in Shields Library and a member of the Staff Intranet Content Group, I have certain responsibilities that include, but are not limited to, migrating wiki pages belonging to the Collection Maintenance Unit and certain other pages as assigned, and acting as a representative for the Collection Maintenance Unit during Staff Intranet Content Group meetings. These responsibilities are pre-existing and not related to this agreement.

However, any work done for my MCM project that you feel would be useful to you will be made available upon request.

Work to be Done

In order to understand how this migration was planned, implemented, and communicated, I intend to:

- take detailed notes during all Staff Intranet Content Group meetings
- review documentation related to the change, including spreadsheets, emails, and other documents
- draw on my own experience assisting in the migration
- and conduct a small number of short interviews with staff

Confidentiality

This is a class project and all information gathered will be used solely for academic purposes. The final paper will be submitted only to Dr. Jane Macoubrie and Dr. Brad Shipley, the professors for CMGT 508, “Communicating Strategy and Change,” although some broad-level details of the project may be discussed with fellow classmates. No individual names will be used.

Conclusion

Thank you for your time and assistance with this project. Please let me know if you have any questions or concerns.

Sincerely,

Jacob Roche