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Fostering Organizational Change through Service and Space Design Strategy

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Meghan Sitar, Director of Connected Scholarship
Rachel Vacek, Head of Design & Discovery
University of Michigan Library

CNI Fall Membership Meeting
December 12, 2017

Hello!

Emily Puckett Rodgers
Head of Library Environments

Meghan Sitar
Director of Connected Scholarship

Rachel Vacek
Head of Design and Discovery

Operations  Learning & Teaching  Library IT


@epuckett  @meghansitar
@vacekrae  @UMichLibrary
And special thanks to Jessie Sher, Project Coordinator.
Spaces & Services
Strategy Development
Why Now?

Take a strategic approach to physical space planning

Create welcoming, accessible, safe buildings and services

Transform organizational culture


@epuckett @meghansitar
@vacekrae @UMichLibrary
Why brightspot?
Engagement

CONNECT
organizational goals and user needs

UNDERSTAND
space, service and organization

APPLY
short and long-term efforts

GAIN TRUST AMIDST CHANGE
by embedding touch points throughout

TRAIN THE TRAINER
through hands-on practice and guidance


@epuckett @meghansitar
@vacekrae @UMichLibrary
Deliverables

**Strategy Report**
Space and Service Principles, Philosophy, Framework

**Playbook**
Flexible scenarios to consider piloting/prototyping guidance

**Research Report**
User research conducted by the team
Space and Service Principles

1. **Enhance the Platform for Discovery** through foundational changes to physical and digital space usability, access, and navigation.

2. **Accelerate Partnerships in Scholarship** by engaging with library users and working them throughout the service experience.

3. **Deliver as One Library** with a shared service philosophy and improved library staff workspace.

Fall 2017
Engagement Activities
Service Design Strategy “Champions” Workshop

Purpose

To develop a shared understanding of the service philosophy and principles in order to begin to build a network of champions for this work in current and future service design.

Neighborhood Block Parties

**Purpose**
- To connect colleagues to our service design work
- To showcase potential areas of collaboration with informal displays of work examples
- To build community in different areas of the library
- To get feedback

**Lessons Learned**
- Timing is important
- Training on design thinking and service design is critical
- Need more effective staff engagement opportunities with concepts
- Engage with library leadership for the planning and thinking about the service design platform as a shared vision

Library of the Future Design Challenges, Workshop, & Exhibit

Engaging the Student Community

● Two design challenges
  ○ Physical design
  ○ Narrative and visual design
● Bicentennial Expo workshop
● Embedded exhibit
  ○ Physical prototype scavenger hunt
  ○ Vinyl displays of work in Hatcher and Shapiro

Library of the Future Design Challenges

Students were asked to imagine what the U-M Library might look like in the future.
Designing Libraries 6

Organizational Change

● Invest in staff retraining
● Identify partnerships with similar goals
● Create teams and structures based on emergent needs rather than departmental structures

Library Space Design

● Visualization technology needs to be connected to user experience
● Acoustic and lighting considerations
● Storefront-style spaces can establish proof-of-concept services

Inspiring Peer Organizations

● Duke University Library’s Edge digital scholarship commons
● University of New York, Rochester Library’s pop-up programming
● Harvard Science Center’s Discovery Bar and Ice Cube
Service Design Task Force Retreat

Purpose

To reflect on service design work and interactions thus far, create a timeline, and to prepare our recommendations for Library Executive Council

Challenges
Challenges

- Building a bridge from virtual to physical
- Moving from collections-centric to service-centric
- Engaging leadership in a large, complex organization
- Using the physical locations on central campus to influence the library’s organizational culture library-wide
- Creating a shared understanding of the context for the work and communicating goals

Recommendations
Recommendation #1: Continued Adoption and Integration

At the leadership level, continue to embed the service philosophy in the work of divisions, with a focus on diffusing these principles for good service into continuing work.
Recommendation #2: Identified Priority Plays

Activate three service teams focused on deep dives and pilot/prototyping work around three plays identified in the Hatcher-Shapiro Library Service and Space Strategy Playbook:

- Digital Scholarship Lab
- Consultation Hub
- Staff Innovation Hub
Recommendation #3: Non-brightspot Mini-Play

Apply the same principles of service design and service teams to the problem of citation management services under discussion by the Library Public Software Taskforce.
Recommendation #4: Library as Research Lab Play - Research Scholars Hub

The Service Design Task Force will partner with the Shapiro Design Lab’s Library Lab to guide graduate students working under the IMLS Library as Research Lab project, using the Research Scholars Hub play as an area for design work in the Design Thinking for Library Services Lab.
Service Teams
Priority Play Service Teams

Purpose

Align related **expertise** from across divisions into a **collaborative group** that can more seamlessly design and deliver services for our users, accelerating our ability to partner in scholarship and deliver services as **one library**.

Membership

1. Service design partner
2. Co-leads
2-4 Additional members

Duration

16-17 weeks (May or June)
Expected Service Team Approach

Deep Dives and Pilots/Prototypes

- **Deep dive** research studies are areas for intense study.

- Deep dive studies will inform **pilot and prototype** opportunities.
Service Design Tools & Their Socialization
Goal and Intentions

For Our Staff

- Tangible
- Anyone can use (with training)
- Large and local application

For Our Organization

- Adaptive and iterative
- User-focused
- Aligns front and back-of-house service

Service Delivery Canvas & Service Design Blueprint

**Service Delivery Canvas**
(adapted from Business Model Canvas)

<table>
<thead>
<tr>
<th>Required Infrastructure</th>
<th><strong>Key Partners</strong></th>
<th><strong>Service Value Proposition</strong></th>
<th><strong>Staff + User Relationship</strong></th>
<th><strong>User Profile</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>What infrastructure does our service value proposition require? (e.g., tools, technology, furniture, staffing)</td>
<td>Who are potential key partners? What are our motivations for these partnerships?</td>
<td>For [user] who [motivation] we offer</td>
<td>What type of relationship do our users expect us to establish and maintain? (e.g., personal assistance, self-service, communities)</td>
<td>For whom are we creating value? (e.g., undergrad, grad, faculty) What are their current problems? Biggest needs?</td>
</tr>
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**Next Steps**
What do we need to understand in order to implement our service value proposition?

**Pilot Plan**
How might we test this service value proposition in simple, user-centered, flexible, and measurable ways?

**Future Service Blueprint**

- **Channels**:
  - What does the user see or interact with?
  - What are staff doing to respond to user actions?
  - What are staff doing behind the scenes to support user actions?
  - What tools or systems are needed to enable user actions?

- **Service**:
  - [Service]

**Direction of service delivery**

**back of house [staff ops]**
Method 2: Visualizing drivers of change

**Purpose**
Using this method helps a team identify the drivers of change that are shaping the issue it plans to address. It helps a group articulate reasons why a service innovation initiative might be necessary, and provides detail on what team members think are the key drivers for change.

**Outcomes**
A shared view of the drivers of change shaping the context for your issue, service, or organisation. Constructing the drivers of change grid helps a team see changes from different perspectives and segments areas, making and creativity. It also highlights important areas of consensus and disagreement and reveals lack of knowledge.

**Preparation**
Ahead of time, invite an academic, artist, or futurist – or all three – to join the workshop to provocate or inspire you. Alternatively, a couple of days before the workshop, circulate lists of questions, articles, or blog posts discussing future developments from a range of fields, not just your organisation’s core areas.

Add a visual dimension to this method by printing out images such as photographs, screen grabs, drawings, and icons that you associate with future developments. Cut these up to be approximately A3 size.

**Tip**
While facilitating, prompt participants towards extremism. Encourage them to speculate, imagine, and be ridiculous.

Lucy Kimbell, 2015
UX Toolkit Project

Leveraging Existing Investment and Excitement

Connecting to New Programs and Opportunities

Journey map from the VA Center for Innovation
Recap

- Tools
- Service Teams
- Leadership
Thank you!

&

Email Us!

libservicedesign@umich.edu
Appendix: Tools & Resources
# Service Blueprint

## Service Delivery Canvas

(adapted from Business Model Canvas)

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<th>2.</th>
<th>3.</th>
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<td><strong>Key Partners</strong>&lt;br&gt;Who are potential key partners? What are our motivations for these partnerships?</td>
<td><strong>Service Value Proposition</strong>&lt;br&gt;For ________ (user) who ________ (motivation) we offer ________ (benefit) with ________ (unique characteristic) ________ (list services here) ________ (adjacencies)?</td>
</tr>
<tr>
<td><strong>Staff + User Relationship</strong>&lt;br&gt;What type of relationship do our users expect us to establish and maintain? (e.g. personal assistance, self-service, communities)</td>
<td><strong>User Profile</strong>&lt;br&gt;For whom are we creating value? (e.g. undergrad, grad, faculty) What are their current problems? Biggest needs?</td>
<td><strong>Location (physical + digital)</strong>&lt;br&gt;Where do we deliver our service value proposition to our users? What are its adjacencies?</td>
</tr>
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**Next Steps**<br>What do we need to understand in order to implement our service value proposition?

**Pilot Plan**<br>How might we test this service value proposition in simple, user-centered, flexible, and measurable ways?
# Service Blueprint

**Future Service Blueprint**

<table>
<thead>
<tr>
<th>Service:</th>
<th></th>
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<table>
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<tr>
<th>user actions</th>
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<tr>
<th>table: tools + systems</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>What tools or systems are needed to enable user actions?</td>
<td></td>
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</table>

*line of visibility*
Recipe 2, from *Service Innovation Handbook* by Lucy Kimbell, 2014
https://serviceinnovationhandbook.org/
A Veteran's Journey

Journey map from the VA Center for Innovation

See also “Toward a Veteran Centered VA” report
Design Thinking for Libraries
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and is available in Deep Blue at http://hdl.handle.net/2027.42/139883