

Improving Library Organizational Communication through Intentional Knowledge Management

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Abstract

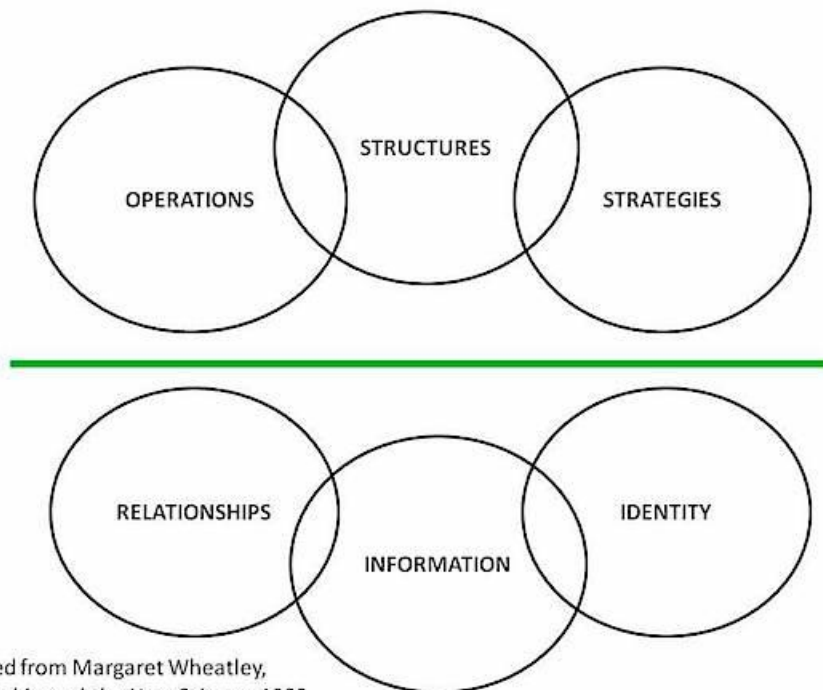
Communication is one of the most important elements affecting productivity and work climate in any organization. Effective organizational communication can contribute to organizational success in many ways including building employee morale, satisfaction, and engagement; giving employees a voice; reducing the chances for misunderstandings; and improving processes and procedures that ultimately create greater efficiencies. Toward that goal, creating a single internal communications hub can drastically reduce the volume of “noise” employees must wade through to access important information. A seven-year knowledge management initiative at the California State University (CSU) San Marcos Library documented the transformation of the library’s organizational communication from decentralized and ineffective communication outlets to a single communication hub, while also identifying areas for future improvements. A Library Task Force created a needs-based matrix of requirements to determine that Confluence, a product from Atlassian, offered the best combination of features, flexibility, design, vendor support, system stability, and cost. Knowledge management is defined broadly as “the conscious process of defining, structuring, retaining, and sharing the knowledge and experience of employees within an organization” (What is knowledge management?, n.d.).

Elements of Organizational Communication Leading to Knowledge Management

Communication is by far one of the most important elements affecting productivity and work climate in any organization. A toolkit for organizational communication best practices created by the Society of Human Resource Managers (SHRM) emphasizes the vital nature of prioritizing this aspect of an organization’s climate (SHRM, 2020). Effective organizational communication

can contribute to organizational success in many ways, including building employee morale, satisfaction, and engagement; giving employees a voice; reducing the chances for misunderstandings; and improving processes and procedures that ultimately create greater efficiencies. In contrast, ineffective organizational communication may increase misunderstandings, damage relationships, break trust, and increase anger and hostility.

The sharing of information is important to organizational stability during times of change. As early as 2001, Margaret Wheatley wrote of the profound changes of the Information Age making knowledge management not only desirable, but necessary, for organizations. Wheatley states “the organization that knows how to convert information into knowledge, that knows what it knows, that can act with greater intelligence and discernment-these are the organizations that will make it into the future” (2001, p. 2). In Wheatley’s “Six Circle Model” for sustainable organizational change (see Figure 1), information is inextricably linked to relationships and identity, as the three elements “below the green line,” and essential to organizational health and stability (Zuieback, 2012). In the model, the term “information” reflects the nature of how information is shared, how it is utilized in decision-making, and how transparent critical information is to all stakeholders in the system.



Adapted from Margaret Wheatley,
Leadership and the New Science, 1992

Figure 1: Wheatley's Six-Circle Model for sustainable organizational change

Recent studies point to how leadership can influence knowledge management. Sayaddi (2019) explored a framework upon which to develop a more comprehensive understanding of the relationships between transformational leadership, knowledge management, a firm's internal resources, and organizational performance. The study elaborates on how leaders can successfully contribute to knowledge management and subsequently improve organizational performance. Alzghoul, Elrehail, Emeagwali, & AlShboul (2018) provide additional insight into the existing theories of leadership and knowledge management by illustrating that when committed employees share knowledge, leaders find it easier to shape a work environment, which eventually motivates employees to perform and engage in creative activities.

Knowledge management is often tied to a common platform for communication. According to Moseley (n.d.), creating a single internal communications hub for an organization can drastically reduce the volume of "noise" employees must wade through to access and consume important information. A central hub can decrease the likelihood of employees missing out on updates while creating opportunities for more open, fluid discussion. Finally, the ability to track engagement and participation rates allows an organization to measure how information is consumed and acted upon. These elements of organizational communication, taken together, provide context for considering knowledge management as impactful to positive organizational communication.

Organizational Communication at CSU San Marcos Library

In June 2014, a new Library Dean led a Library-wide meeting on organizational communication at CSU San Marcos. The Dean wanted to understand the Library's current methods of communication and gather ideas from Library employees on what could be improved.

Each Library employee (comprised of staff and faculty librarians) was given a large index card and asked to list communication needs on one side. Employees then passed their cards to their neighbors, who were asked to brainstorm ideas or solutions that could help to meet those needs. The Dean then collected the cards for analysis and further reflection.

Primary organizational communication needs included, but were not limited to:

- Improving communication between Library staff and faculty librarians
- Improving communication between Library administration and employees
- Improving communication between Library units
- Developing the ability to share agendas and meeting notes
- Improving project management communication to include proactively informing any unit that may be impacted by a project

- Developing a decision-making process that fostered open communication
- Providing access to up-to-date and centralized documentation of Library operations and budget information
- Increasing the amount of information accessible to all Library employees
- Providing a common, one-stop shop for communication
- Increasing the number of updates from units
- Establishing communication norms
- Improving engagement with Library activities and initiatives
- Developing a stronger information-sharing culture

From that first meeting and ongoing discussion within the Library, the Dean set these priorities:

1. Build a culture of trust
2. Facilitate a stronger information-sharing culture
3. Attempt to create a common place for communications
4. Inform the Library as a whole, not as individual groups
5. Share abbreviated unit meeting agendas and minutes across the board

Framed as “guiding principles,” the Dean charged a seven-member Knowledge Management Task Force with recommending a knowledge sharing system that would meet the organizational communications outcomes articulated by Library employees. The Knowledge Management Task Force used as its framework Davenport’s (1994) definition of knowledge management [KM]: “the conscious process of defining, structuring, retaining, and sharing the knowledge and experience of employees within an organization.” The three main elements of KM are accumulating, storing, and sharing knowledge.

Background and Timeline of the Initiative

Prior to the KM initiative, the Library utilized an intranet established in 2000 that was primarily used to share meeting notes and organize policy documents. A more ambitious version launched in 2009 expanded the technical functionality to include web page editing, better access management, for groups within the Library, and file-sharing integration.

The 2009 implementation focused on matching new technical capabilities with potential use cases, but it did not incorporate an organizational business needs analysis of knowledge sharing and communication. Moreover, Library leadership did not prioritize KM, and the initiative lacked funding. As a result, the advantages offered by a centralized KM location were not well

communicated across the organization, and there was uneven support for adopting the system. Insufficient resources for ongoing development of this home-grown application further hindered adoption, as some aspects of the application's functionality fell short of expectations, and parts of the system were not user friendly. This led to divergent methods of KM within the organization, with some staff using the intranet while others used different systems, such as Windows network drives, Google Drive, and Box for storing and sharing information.

Analysis of the information gathered from the June 2014 Library-wide meeting on organizational communication revealed KM as a significant issue that was negatively impacting information sharing and communication. Based on this assessment, the Library Dean made knowledge sharing strategy a top priority for the organization. A coherent strategy offered the potential to improve collaboration, communication, and transparency. The scope of this knowledge sharing initiative was defined to include internal communication, document sharing, collaborative tools, and a central information repository to host Library documentation.

The Dean worked with the head of library technology to develop and implement a comprehensive two-phased initiative.

Phase One: Needs Analysis and Product Selection

The initial phase established the Knowledge Management Task Force (KMTF) to set priorities, assess needs, define technology system requirements, and recommend solutions. The Task Force, which included a representative from each major group in the Library, was charged with researching and proposing KM best practices for the Library to use. It would work with stakeholders to create a business needs analysis for the purpose of evaluating KM systems and recommending the most suitable for purchase. The Task Force was also charged with providing training sessions and creating self-help guides for users. The Task Force was comprised of representatives from each Library department and committee. The Task Force was asked to accomplish its goals within a twelve-month period.

The Task Force first distributed a questionnaire designed to gather information on strengths and weakness of KM systems used by each Library department and committee. The questions also sought more detailed business process information such as file locations used, types of content stored, KM-related roles, and systems that were not used and why.

Several themes emerged as the KMTF analyzed the data submitted in response to the questionnaire. Respondents described frustration with multiple, overlapping file storage locations and information repositories. Respondents found that groups used differing and inconsistent

methods to share documents and post meeting minutes. They also voiced concerns about information silos and the difficulties they encountered when searching for organizational information.

The Task Force developed a list of high-level requirements that would guide the selection and implementation of new KM systems and practices. The Task Force also defined a more detailed set of deliverables for each requirement to aid the evaluation process. The team's work to finalize the requirements and deliverables documents [Appendix A] required and benefited from ongoing communication with stakeholders. The Task Force used the requirements and deliverables documents as a framework for the evaluation of KM systems, leading to the final selection.

The Task Force compiled an extensive list of KM applications that was narrowed down to 15 that offered more comprehensive feature sets. This process included consulting with the main campus IT group on the availability of existing or planned KM systems at CSUSM. From those discussions, it was determined that campus IT did not have plans to implement a KM system in the foreseeable future. After a thorough analysis, the team chose six finalists based on desirable features, cost, and usability. They then performed an extensive series of tests using an agreed-upon set of use cases. The results informed the recommendation presented to stakeholders.

The Task Force determined that Confluence, a product from Atlassian, offered the best combination of features, flexibility, design, vendor support, system stability, and cost. The group found it to be a refined and full-featured product that offered the most user-friendly interface and a system architecture that allowed for extensibility. The Task Force noted that the system was widely used among other universities and organizations, and that the vendor was highly supportive of academic institutions in its pricing. In addition, Confluence had a well-established developer ecosystem, local and cloud hosting options, and an extensive user base.

Once Confluence was selected, Library employees nominated and voted on a Library-specific name for the tool, and "L-Space" was born.

Phase Two: Implementation of the KM System and Adoption of KM Practices

With the business needs analysis and product selection complete, the initiative entered the next phase of the plan: the implementation of the KM system, the adoption of KM practices, and change management. These tasks were assumed by a new cross-department group, the Knowledge Sharing Initiative Team. The Team would carry out its charge by working closely with all library groups to reorganize content, develop best practices for improving KM workflows,

provide training in the use of Confluence, and assess the ongoing state of KM within the Library. Communication was an integral part of the implementation process and took the form of presentations, biweekly team meetings, stakeholder meetings, post-training follow-up assessments, and anonymous feedback forms. Each of these events and opportunities was amplified by the Dean in weekly blog posts, follow up email messages, and in-person meetings.

Implementation of Content Management Strategy

Confluence groups content into spaces; these spaces would serve as the means by which the Library could organize its content in a meaningful way. Space blueprints are templates designed to help jumpstart the space creation process, and Confluence provides examples for documentation, team collaboration, and project management.

The Knowledge Sharing Initiative Team used feedback collected from the environmental scan and KM questionnaire to create team collaboration spaces for departments and committees. Major knowledge areas such as the unified library management system (ULMS), user experience, discovery, and professional development each received a documentation space, as did large-scale projects, such as the library website redesign and the CSU (California State University) systemwide ULMS implementation.

The Knowledge Sharing Initiative Team worked with stakeholders to migrate content from the previous system to their new spaces, develop a KM strategy, design navigation, and build home page dashboards that highlighted new or often-used content. The Team also provided insights on enhancing the design of content pages and adding useful Confluence functionality such as cross-referencing with other pages and dynamic content.

Implementation of KM Best Practices

In collaboration with each department and group, the Knowledge Sharing Initiative Team developed a set of best practices for KM and information sharing in the library. These best practices provide practical advice on using Confluence to accomplish KM tasks such as designing space navigation, building space dashboards, managing notifications, embedding metadata into content pages, and using descriptive tags to improve findability.

The KM practices also addressed challenges that had been identified in the environmental scan. The most significant need was to help users understand when to use external tools, such as Google Docs and Microsoft Excel, versus when to create a document in L-Space, as Confluence was now known in the Library.

In response to user preferences and to ease adoption of Confluence, the Knowledge Sharing Initiative Team incorporated the use of Google Docs and Microsoft Word as optional methods for creating new content meant to be shared within the organization. Working on a draft document outside of L-Space was not seen as having a negative impact on organizational KM if the document was eventually published within L-Space. The final guidelines for publishing new content stated that all Library documents would be shared in L-Space upon publication. The drafting process was recommended but not required to take place in L-Space.

A similar KM issue focused on integrating Microsoft Excel spreadsheets and Microsoft Word documents that required the use of templates and macros, such as official memos and human resources documents. How should the library store and organize files that were meant to be shared within the organization but were not suited for conversion into Confluence pages?

When the Library implemented Confluence in 2016, the University was utilizing Box (another content sharing and collaboration tool), as the file storage and file sharing system for employees and campus-affiliated groups. Most Word and Excel files owned by groups within the Library organization were already organized into folders within Box. Though Confluence offers user-friendly file attachment management and attachment editing, the Knowledge Sharing Initiative Team recognized that migrating thousands of Word and Excel documents already organized in Box folders over to L-Space (Confluence) as page attachments was not the best use of time and resources, especially given the lack of an automated migration process.

The Team asked Library groups to create links from L-Space (Confluence) to their existing folders in Box. However, going forward, the groups were asked to publish new content in L-Space. In most cases, users found they could replace the use of Microsoft Word with pages created in L-Space.

Implementation of Training

To promote adoption of the new system, the Knowledge Sharing Initiative Team worked with the Library Technology Initiatives and Development department to create FAQs, tutorials, how-to articles, and training sessions. These were designed to offer more specific and contextualized guidance for how the Library would practice KM and to extend, not replace, the excellent support documentation provided by the vendor.

For example, the Team created tutorials on using Confluence templates designed for creating meeting notes because that was a content type widely used in the Library. How-to articles were designed to help users with introductory topics and to access advanced functionality more

easily. These included guides on the use of Confluence macros, which add dynamic functionality to Confluence pages. For the guide on the use of macros, the Team created a curated list and provided examples of how macros might be useful, such as adding automated tables of contents, advanced table features, dynamic content, complex content designs, and much more.

For the in-person training sessions, the Team focused on six topic areas: content creation, content organization, L-space access management, notification management, content search, and use of special features such as page templates and tasks. The six training areas correlated with the business needs analysis and responses to the questionnaires distributed in Phase One of the KM initiative. Almost all members of the organization attended at least one training session, and the feedback gathered in post-training surveys was very encouraging. The findings from those surveys are discussed in the next section.

Implementation Assessment

A user satisfaction survey was distributed several months after the new KM workflows were implemented and the L-Space system went live. Many survey respondents found the system easy to use when creating content and for finding content belonging to their group. Highlights of the results of the survey, which was distributed to all 45 members of the organization, are shown below.

- 97% of survey respondents felt that L-Space met the needs of their unit (27 responses)
- 81% of survey respondents felt they had adequate training in the use of L-Space (26 responses)
- 84% of survey respondents felt they were able to collaborate effectively with other members of the organization (26 responses)
- 74% of survey respondents felt they were more knowledgeable of library activities and policies because they use L-Space (35 responses)

The survey also uncovered some challenges, where users needed more training or where further development was needed in the Library's KM practices. A significant number (30% of 31 respondents) indicated they found it challenging to attach documents located in Box. Approximately a third of respondents wanted to know more about using search features and needed more help with best practices for organizing content. Twenty-five percent found it difficult to find Library-wide policies and procedures.

The Knowledge Sharing Initiative Team wrapped up Phase Two with a project retrospective report that assessed the implementation status of each item in the Requirements, Measures, and Deliverables document [see Appendix B].

A key recommendation was the need for a permanent group, with representation from each Library department, to help build knowledge sharing sustainability and growth by fostering engagement and providing support. The primary roles for group members would be to provide recommendations to their department on organizing information and to serve as experts on L-Space functionality for their colleagues. The group would also work together to provide training sessions, update documentation, and review KM workflows. Library leadership approved the recommendation to form the new group and name it the Knowledge Sharing Champions in recognition of its advocacy role.

Another recommendation was to provide additional training focusing on the specific needs highlighted in the survey. The newly formed Knowledge Sharing Champions group addressed this by creating concise online tutorials in the topic areas where survey respondents indicated they needed more help. In-person training workshops were also offered on a quarterly basis during the 2016-17 academic year. Prior to each workshop, a call for topics was sent out to the Library to ensure each session was relevant to the attendees' KM needs. The interest and participation in these workshops have led to ongoing offerings each semester.

Responses to follow-up surveys conducted in Spring 2017, Fall 2017, and Fall 2019 revealed that individuals were generally more comfortable with using the features in L-Space. Users continued to have questions about when to use L-Space and when to use SharePoint, the campus file sharing system that replaced Box in 2017. Responses also revealed interest in more training on advanced search, user access management, and optimizing the findability of information. The top two training topic requests in the Fall 2019 survey were "how to organize a space" and "when to use L-Space, SharePoint, or another tool." A significant number of respondents also expressed interest in a refresher on L-Space basics and how to set permissions for specific pages.

Knowledge sharing continues to become more deeply rooted within the Library organization, and L-Space continues to assume its place as the central information hub. Analytics show continued growth each year in the number of pages in the system [see Appendix C], along with steady growth in pages edited. Virtually all content is placed into L-Space or linked from within the knowledge sharing system. As a result, there is now an expectation among all members of the organization that information they need should be available in L-Space.

Data collected from 2019 to present indicate consistent and engaged year over year use of L-Space by employees who work in the Library (not including student assistants). Analysis of usage data from that period shows an average of 250 pages views and 49 pages edited or created per business day (within an organization of approximately 50 full-time employees). That number represents significant engagement when considered in the context of the other applications that members of the Library organization use for their work. For example, most staff utilize Alma (a Unified Library Management System) for much of their day-to-day job responsibilities. Library faculty use LibGuides, online chat, Slack, research databases, and the Library website for teaching and research assistance. When considered alongside other types of work-related activities, the usage analytics for L-Space support the conclusion that L-Space is an integral part of each Library employee's day-to-day work life.

Another encouraging sign is the use of the more advanced and complex features within L-Space. Individuals in several departments have taken the lead in further customizing the design and functionality of the space dashboards utilized by their groups. Others are using advanced forms to improve business processes by replacing Word documents and spreadsheets. Some are using their personal spaces for creating weekly work logs, managing new document drafts, and tracking tasks.

Project management templates provided through L-Space have become an important part of the planning and communication process for many Library projects. These project planning templates have gained additional functionality with the implementation of a well-integrated project management system that extended further the usage of L-Space.

Challenges and Opportunities

A significant challenge of any knowledge management system is ensuring that content is findable and up to date. The rapid growth of L-Space has highlighted the need to periodically examine the organization of content within spaces. The Knowledge Sharing Champions Team is addressing this by providing content audit reports that list the last modification date, title, and owner of each page within the KM system. These reports allow content owners to quickly see which pages might need updating. In addition, the Team is now providing quarterly analytics reports to content owners. The analytics data helps content owners determine which pages are ready for archiving and which to retain.

A related challenge is the need to ensure organizational units incorporate time and processes for review and re-organization of content. The content audit reports, first generated in early 2021 four years after initial implementation, have shown that content upkeep needs to

become a higher priority within departments. The Knowledge Sharing Champions Team is working to help Library groups take a more structured and planned approach to content review. The team will encourage Library groups to set aside dedicated time between semesters to update their content in the KM system.

The integration of documents created outside L-Space, for example in Word or Excel, into the KM system still needs a more seamless and user-friendly solution. A recently implemented add-on allows for more easily embedding a SharePoint directory within an L-Space page. This may help improve integration between the two systems. It is a promising sign that Atlassian has expanded its commitment to provide greater integration between its products and those created by other software companies.

Conclusion

As the global pandemic of COVID-19 became a crisis affecting all levels of society in Spring 2020, libraries and universities began to close. At CSU San Marcos, a centralized KM system has been critical to ongoing and cohesive communication in the virtual environment. In this environment, L-Space has become even more important to our Library's functioning and collaboration, as we have undertaken new initiatives to meet the needs of our campus community and workflows have consequently shifted dramatically.

As underscored by consistent feedback from Library employees in the KM surveys over time, organizational communication must remain unfailingly "front of mind" for Library leadership. In a Library climate survey in January 2020, the ClimateQual scale for "informational justice" for the CSU San Marcos Library was 5.55 (on a scale of 1 to 7), while the score for peer benchmark institutions was 3.33. Informational justice refers to whether or not an employee has access to the information they need. This type of justice indicates that transparency—that is, supervisors being honest and open with employees—is imperative to an employee's sense of justice in the workplace (Association of Research Libraries, n.d.). While this peer comparison shows the Library is doing well compared to its peers, informational justice is a value to which Library leadership continues to be dedicated.

Our knowledge sharing initiative has directly and positively affected, or solved, four of the five organizational communication priorities identified back in 2014: 1. facilitating a stronger information sharing culture; 2. creating a common place for communications; 3. informing the Library as a whole, not as individual groups; and 4. sharing abbreviated unit meeting agendas and minutes across the board. That said, some of the themes that arose in the 2014 meeting on

organizational communication continue to persist, including a decision-making process that fosters open communication and the need for better communication between employee classifications in the Library (staff, faculty, and administration). These are areas that we continue to address as part of a holistic organizational communication ecosystem of which L-Space is an important part.

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Appendix A: Requirements, Measures, and Deliverables

	Requirements	Measures, and Deliverables
1	Share and provide information to groups and individuals as appropriate	<ul style="list-style-type: none"> • Transmitted notifications are clear and consistent in structure • Recipients can respond to notifications and post to KM system via email
2	Provide location for posting and finding unit-level operational documents such as policies, procedures, training materials, statistics	<ul style="list-style-type: none"> • Processes for adding and editing information are clear • Information is easily transferred from other systems • Create centralized location
3	Manage access to content based on individual's roles and groups	<ul style="list-style-type: none"> • Able to designate document as group-only or accessible to entire organization • Ability to designate content as publicly available • Integrated with campus login • Designate one point person for each group • Provide access management form per group owner
4	Provide collaborative content editing and management	<ul style="list-style-type: none"> • Editing privileges for documents can be distributed amongst a group

		<ul style="list-style-type: none"> ● Maintain history of content revisions ● Allow unmediated contributions within guidelines
5	Provide intuitive interface	<ul style="list-style-type: none"> ● Offer multiple pathways for finding content ● Interface is simple and straightforward ● Group owners can easily modify navigation and arrangement of content ● Content editor is easy to use
6	Organize and provide context for content placed within KM system	<ul style="list-style-type: none"> ● Create policies on describing what content must be placed into the KMS ● Allow for group-specific organizational schemes ● Offer ability for individuals to group content
7	Develop content standards and processes for content contribution and management	<ul style="list-style-type: none"> ● Provide examples, training, and designated point person to manage content style and naming. ● Specify consistent schema for content titles and categorization ● Submitted content lists author, revision date ● Meeting notes list attendee, agenda, date ● Process for finalizing a document is clearly understood ● Provide standardized form for sharing information

8	Determine content collection boundaries for organization-wide KM	<ul style="list-style-type: none"> ● Determine criteria for publishing content to KMS ● Setup workflow for content publication ● Designate KM person for each group ● Define historical versus active documents
9	Build searchable repository for content	<ul style="list-style-type: none"> ● Discovery tools are clearly understood ● Search context is clearly communicated ● Live search ● Autocomplete ● Full-text ● Fast ● Search can be limited by group or section ● Faceted search results
10	Integrate common communication workflows	<ul style="list-style-type: none"> ● Ability to post comments via email ● Relevant content from project issues is transferred to appropriate KM space
11	Integrate performance measurements for KM contributions, document management [DO], and upkeep	<ul style="list-style-type: none"> ● Data-supported analysis of the system ● Archiving policy (for upkeep)
12	Provide training for use of KM systems	<ul style="list-style-type: none"> ● Provide FAQ and forum for addressing KM system questions

		<ul style="list-style-type: none"> • Provide regular training on KM system, workflow, and processes • KM systems are highly rated via survey response
13	Provide a consistent method for associating files and images with content	<ul style="list-style-type: none"> • File and image upload process is well-defined and easy-to-use
14	System is easy to maintain, upgrade, enhance, and recover	<ul style="list-style-type: none"> • Regular backup of data, application, and environment • Process for recovery is well-defined • MOU's with IITS in-place as necessary

Appendix B: Project Assessment and Recommendations for Next Steps

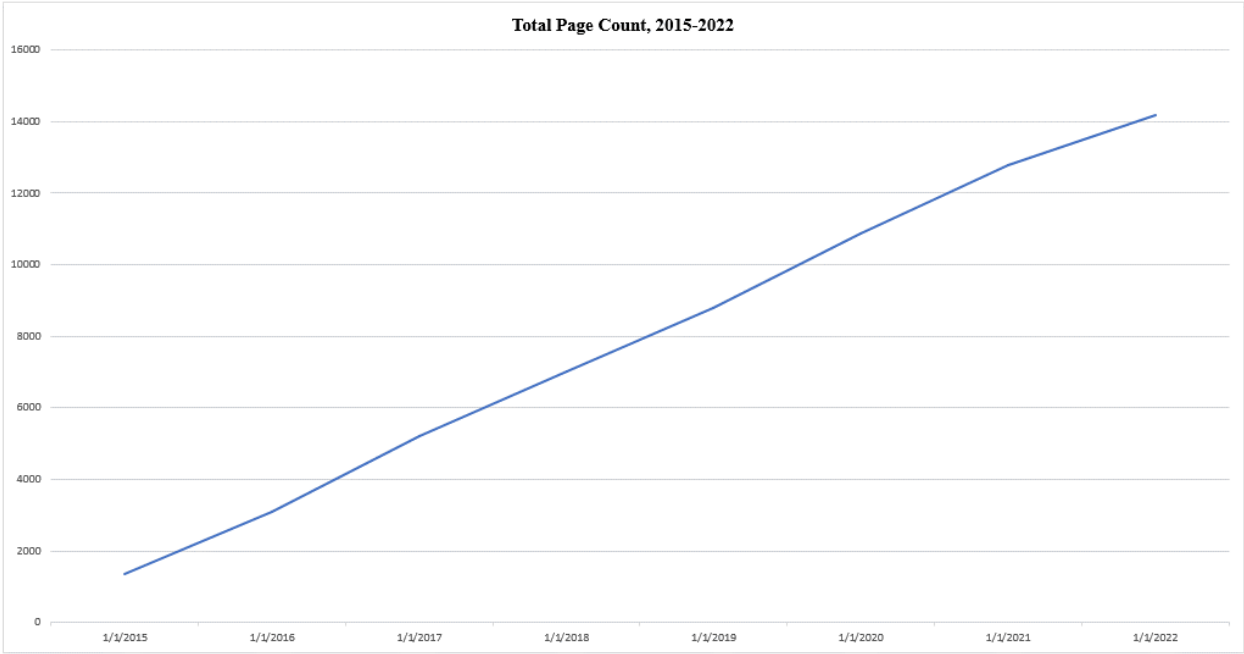
Requirement / Deliverables	Assessment	Recommendation	Timeline	Actions and Resources Needed
<p>Requirement 7: Develop content standards and processes for content contribution and management</p> <p>Deliverables</p> <ul style="list-style-type: none"> ▪ Provide examples, 	<p>1. Of 33 survey responses, less than 50% of library-wide survey respondents answered yes to the statement "do you feel you had adequate training to use L-Space."</p>	<p>To address the areas of need highlighted by the survey responses, selecting a person from each department to serve as the knowledge sharing champion (KSC) would help each department build familiarity with the</p>	<p>Selection of personnel and training completed by 19 Aug 2016</p>	<p>1. KSC designee will allocate two hours per week towards role and attend monthly meetings.</p> <p>2. LTID will provide training and technical support.</p> <p>3. LTID will develop</p>

<p>training, and designated point person to manage content style and naming</p> <ul style="list-style-type: none"> ▪ Specify consistent schema for content titles and categorization ▪ Submitted content lists author, revision date ▪ Meeting notes list attendee, agenda, date ▪ Process for finalizing a document is clearly understood ▪ Provide standardized form for sharing information 	<p>2. "Organizing pages and content in L-Space" and "choosing the appropriate template or tool to use when adding or editing in L-Space" each received 9 or more responses describing those processes as challenging (see info note on right for response options). For both process, 21 responded 'OK' or better. (see end of table for response options)</p> <p>3. While 28 responses rated 'OK' or better for choosing what content should or should not go into L-Space, 7 indicated that process was challenging or difficult.</p> <p>4. "Creating and using meeting notes" and "finding policies and procedures for my unit" both received</p>	<p>organization of content and the methods by which publish and update that content.</p> <p>A KSC in each department is beneficial because they will have much greater familiarity with the knowledge contributors and content.</p> <p>Roles for the KSC would include the following.</p> <ul style="list-style-type: none"> • Organize pages and content in L-Space for the department. • Assist members of their department determine the appropriate location and template to use when creating content. • Meet monthly with other KSC designees as part of the KSC team. • Build knowledge sharing sustainability and growth by fostering engagement and providing support. <p>A working group consisting of the departmental KSC and LTID representatives should meet</p>		<p>standardized onboarding training for incoming KSC. This will include a mix of online and in-person training, as appropriate to the KSC's experience level with L-Space/Box.</p> <ol style="list-style-type: none"> 4. The Head of LTID will coordinate meetings during the first year. 5. LTID will have one representative attend monthly meetings. 6. Librarian with UX role would attend monthly meetings. 7. Departmental leadership support and advocacy 8. LTID enhancement development process and resources (10 hours per semester) 9. In first 2 years, KSC role would rotate on 1-2 year basis. 10. After initial 2 years, each department determines
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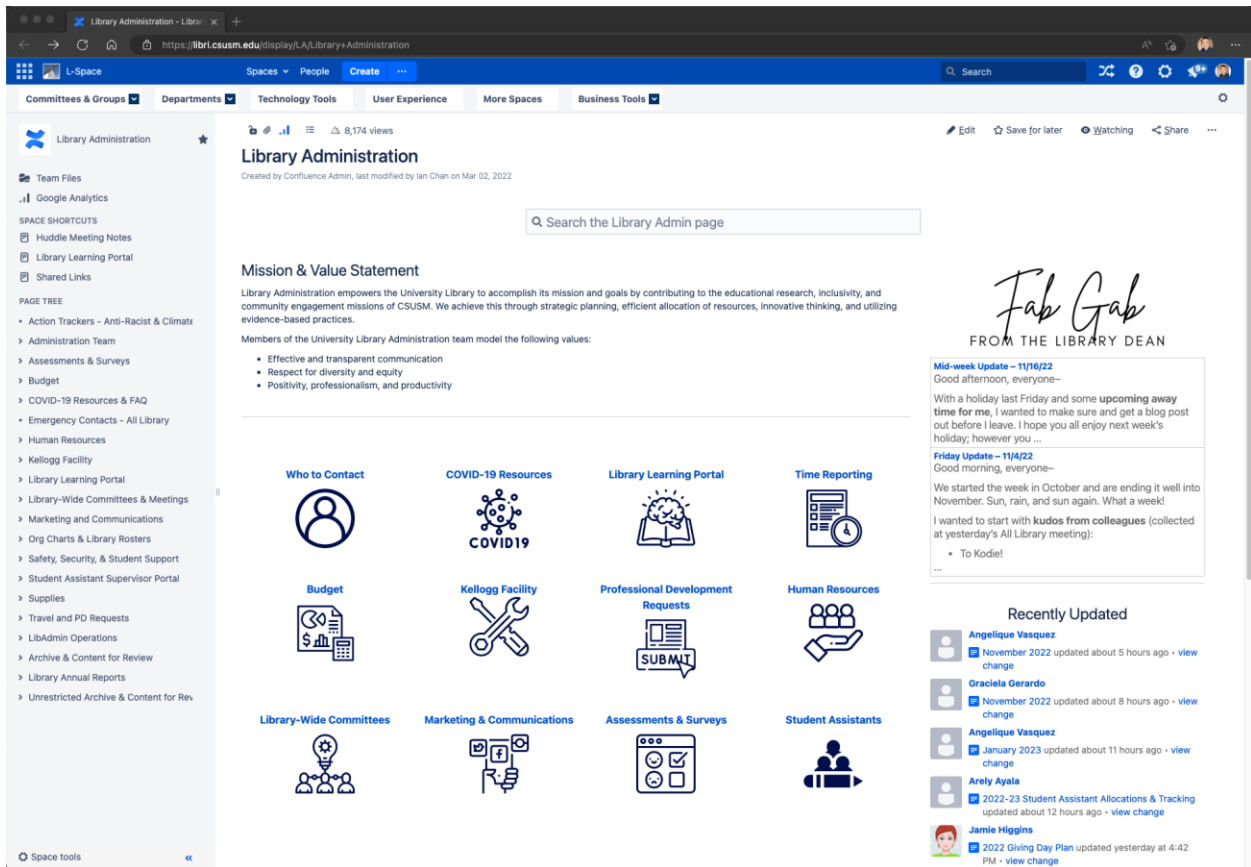
	<p>high ratings. However, while "finding library wide policies and procedures" 11 "just fine" and 14 "OK" responses, it also was marked as challenging by 7 respondents.</p>	<p>monthly to share insights and issues with the goal of collaboratively improving knowledge sharing within the organization. The Head of LTID will coordinate meetings during the first year. Please see KSC - purpose and scope</p>		<p>whether to continue with rotating KSC role or for one person to assume role as part of job description.</p>
<p>Requirement 8: Determine content collection boundaries for organization-wide KM</p> <p>Deliverables</p> <ul style="list-style-type: none"> • Determine criteria for publishing content to KMS • Setup workflow for content publication • Designate KM person for each group • Define historical versus active documents 	<p>While basic criteria and workflow for publishing content is in-use, these are not commonly understood or easily found. This is supported by responses from the KSI team and from the survey results (see 1 and 2 above).</p>	<p>The recommendation provided for requirement 7 would address needs in this as well. In addition, the KSCs would help write the policies for content publication and content archiving.</p>	<p>Complete initial version of documents for content publication policy, content workflow process, and content archiving process by 09 Dec 2016</p>	<p>2 meetings and 2 hours per KSC designee prior to Fall 2016 semester. Additional work included with time commitment described in #1 above.</p> <p>Librarian with UX role would contribute to developing policies</p>
<p>Requirement 12: Provide</p>	<p>As noted in item #1 of the assessment of requirement 7 (above), less than</p>	<p>Providing training in the form of workshops and online tutorials would help address</p>	<p>Provide 2 hours of training during the</p>	<p>4 hours to prepare and present August 2016 workshop.</p>

<p>training for use of KM systems</p> <p>Deliverables</p> <ul style="list-style-type: none"> • Provide FAQ and forum for addressing KM system questions • Provide regular training on KM system, workflow, and processes • KM systems are highly rated via survey response 	<p>50% of library-wide survey respondents answered yes to the statement "do you feel you had adequate training to use L-Space."</p> <p>8 respondents found that attaching Box and Google files into pages was a challenge, while 3 indicated that it was frustrating and difficult.</p> <p>Similarly, 15 found attaching files, images, videos, and other content into pages to be "OK" and 7 indicated it was "just fine", 6 found those types of actions to be challenging and 2 found it frustrating and difficult.</p>	<p>the needs in this area and requirement 7.</p> <p>Feedback provided by the team at KSI meetings also supports the need for more training. While adding, editing, and sharing content receives high marks (slides 8, 9, 10 of attached PowerPoint), close to 30% of survey respondents indicated they need more help in using features such as file attachments and embedding external documents.</p> <p>Training will increase the overall comfortable level with L-Space and help Library personnel understand how to use the system more effectively in support of their work.</p>	<p>week of 15 Aug 2016</p> <p>Provide 1 hour workshop during week of 24 Oct 2016</p> <p>Provide 1 hour workshop during week of 09 Jan 2017</p> <p>Provide 1 hour workshop during week of 27 Mar 2017</p> <p>Prepare additional online training materials prior to 15 Aug 2016.</p> <p>Periodically add training materials as necessary throughout the AY.</p>	<p>2.5 hours per additional 1-hour workshop.</p> <p>4 hours to prepare online training materials prior to 15 Aug 2016.</p> <p>12 additional hours during AY 2016-17 to continue to develop online training materials and help pages. Most of these hours would come from LTID with some contributions from the KSC from each department.</p> <p>Librarian with UX role will assist with providing training.</p>
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Appendix C: Growth in total number of L-Spaces pages, 2015-2022



Appendix D: Screenshots of Highlighted L-Space Pages



Action Trackers - Anti-Racist & Climate Priorities

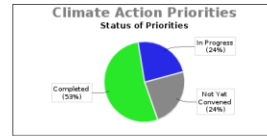
Created by Lily Sasinouan, last modified by Robert Sheehan on Jun 08, 2022

Anti-Racist Action Priorities

Mission	I	II	III	IV	V	VI	VII
<p>In response to ongoing anti-Black violence and widespread oppression of Black, Indigenous, and People of Color (BIPOC), in July of 2020 Cabinet developed a series of seven anti-racist action commitments in dialogue with Lalitha Nataraj and Dr. Toni Olivas (these commitments are also featured in the Black Lives Matter resource guide developed by Holly Hampton and Lalitha Nataraj).</p> <p>> Click here to expand...</p>							

Climate Action Priorities

Mission	I	II	III	IV	V
<p>These initial climate action priorities are informed by the Library's 2020 climate and racial justice assessments - they are not listed in priority order, and have a variety of implementation timelines. Jen and Char presented on these action priorities at the 10/21 All Library Meeting, and you can view a recording of that presentation.</p> <p>> Click here to expand...</p>					



Action Trackers

[Click Here to Submit an Action](#)

Form: [ClimateActionTracker](#)

Priority	Action Commitment	Convener	Status	Action Taken	Related L-Space Content	External Links	Additional Documents
Anti-Racist Action Priority	ARA 1. Examine the racial composition of our leadership team and identify methods...	All Library	COMPLETE	In response to feedback, Library Cabinet and Library Advisory Council sunsetted in January of 2021 and a new Library leadership group, the Library Leadership Team, was convened. This group includes one at-large faculty and one at-	LA : Library Leadership Team FY21/22 - Archive	https://microsites.csusm.edu/deans-blog/2021/04/02/friday-update-4-2-21/	...
Anti-Racist Action	ARA 2. Examine our recruitment and retention practices across...	Multiple Stakeholders	IN-PROGRESS	Library Faculty Council undertook a process to examine hiring practices to ensure greater			...

Library Technology Initiatives and Development

Dashboard | LTID Team

Search this space

Upcoming and Recent Meetings

- 2022-11-15 LTID Meeting
- 2022-11-08 LTID Meeting
- 2022-11-01 LTID Meeting
- 2022-10-25 LTID Meeting

Meeting action items

Description	Due date	Assignee	Task appears on
<input type="checkbox"/> @Amanda Dalgleish will suggest articles for next DEIA discussion by 28 Nov 2022.	28 Nov 2022	Amanda Dalgleish	2022-11-15 LTID Meeting

Active projects

Project	Overall Status
Confluence Cloud Migration	PLANNING
CSUSM MFA Implementation Support	IN-PROGRESS
Digital Preservation - Implementation of Technology Components	IN-PROGRESS
Discovery UX Assessment 2022-2023	BACKLOG
Improved Stacks Wayfinding	IN-PROGRESS
Indie Beer Podcast Archive - Technology Components Implementation	PLANNING
Jira Cloud Migration	PLANNING
Library Profiles Improvements	PLANNING
Library Room Scheduling System 2023	PLANNING
LibStaffer Implementation	PLANNING
Meescan Technology Services and Components	POSTPONED
Scanner Computer Upgrades	IN-PROGRESS
ScholarWorks Data Harvest Testing in Primo	PLANNING

Submit an LTID Support Ticket

More Support Options

Library Technology Outage and Maintenance Communication Plans

Recently updated (includes subspaces)

Ian Chan

- Library Technology Initiatives and Development updated less than a minute ago - view change
- 2022-11-15 LTID Meeting updated a minute ago - view change
- 2021-10-05 LTID Meeting updated 4 minutes ago - view change
- 2022-02-15 LTID Meeting updated 4 minutes ago - view change
- 2021-02-17 LTID Meeting updated 4 minutes ago - view change
- 2022-07-11 Meeting notes - Library Technology Asset Management updated 4 minutes ago - view change
- 2022-09-29 Confluence and Jira Migration Planning updated yesterday at 10:27 AM - view change
- 2022-08-16 LTID 2022 Annual Retreat Notes Draft updated yesterday at 10:26 AM - view change
- 2022-11-01 LTID Meeting commented Nov 15, 2022
- 2022-11-01 LTID Meeting commented Nov 15, 2022

Roger Delgado

- 2022-11-15 LTID Meeting updated Nov 15, 2022 - view change

Ian Chan

- LibStaffer Implementation created Nov 14, 2022
- Library Room Scheduling System 2023 updated Nov 14, 2022 - view change

Khuong Vu

- 2022-11-15 LTID Meeting commented Nov 14, 2022
- 2022-11-15 LTID Meeting updated Nov 14, 2022 - view change

Ian Chan

- LTID Schedules updated Nov 14, 2022 - view change

Steven Espinoza

- LibColdStorage Windows Server 2019 - Not Needed updated

LTID Support - LTID Support - x +
 https://libri.csusm.edu/display/LS

L-Space Spaces People Google Analytics Create

Committees & Groups Departments Technology Tools User Experience More Spaces Business Tools

LTID Support
 Get help with Library technology tools and services

Submit a Support Request

For Emergencies, call:
 760-750-4358 or
 760-683-4234

- LTID Support Channel in Teams
- Library Technology System Status
- LTID Support Hours and Response Times
- Reporting Process for Technology Issues
- Contacts for Library Technology
- LTID Change Notes and Upcoming Projects

Technology Tools Help

Expand all Collapse all

- Alma Central
- Discovery and Primo
- Drupal and the Library Website
- Email, Listservs, Mailboxes, Calendars
- Group Study Rooms - GSR
- Jira Service Desk and Jira Core
- Kellogg Building Systems
- LibGuides and LibAnswers
- Library Desktop Applications
- L-Space
- LTID Support
- Shared links
- SharePoint
- Team Password Manager - TPM

Open Support Desk Tickets

Please login to the LTID Support Site and checkmark **keep me logged in**.
 After you login, you should have access to the table below.

Looking for Development tickets?

Summary	Assignee	Key	Updated	Reporter
Add a new box to the Research and Course Guides page	Ian Chan	INTSUPPORT-7953	Nov 17, 2022	Virginia Velati Tirona
List of all email subscribers from Library Website	Danny Chung	INTSUPPORT-7945	Nov 16, 2022	Jamie Higgins
[Wordfence Alert] Problems found on microsites.csusm.edu	Roger Delgado	INTSUPPORT-7943	Nov 16, 2022	ltid-jira@csusm.edu
Page performance change alert on biblio.csusm.edu	Danny Chung	INTSUPPORT-7938	Nov 17, 2022	ltid-jira@csusm.edu

4 Issues Refresh

Libri CSUM.edu | Spaces | People | Google Analytics | Create | Search

Committees & Groups | Departments | Technology Tools | User Experience | More Spaces | Business Tools

Collections, Delivery and Access

Created by exec_admin2, last modified by Lauren Magnuson on Sep 22, 2022

4,893 views


partmental To support and facilitate innovative, student-centered teaching and learning at CSUSM, CDA staff provide value-added professional work in acquiring, organizing and delivering all formats of information resources.

Functional Area Mission Statement

Collections, Delivery and Access (CDA) connects the CSU San Marcos community with seamless access to the wealth of knowledge within and beyond our library collections. We focus on the acquisition, discovery, and delivery of information to support our users' teaching, scholarship, and learning needs while promoting the University's values of inclusiveness and social justice. Our services include interlibrary loan, document delivery, acquisitions, serials management, electronic resource management, licensing, collection analytics, cataloging and metadata work.

Revised 9/7/2018

Shared Values



Q

Recently updated

- Receiving and Processing Curriculum Material
Nov 10, 2022 - updated by Dasha Pavel - view change
- Natalya's leave documentation
Nov 08, 2022 - created by Natalya Serge Magazino
- 2022-11-08 CDA Meeting notes
Nov 08, 2022 - updated by Lauren Magnuson - view change
- 2022-10-25 CDA Meeting notes
Nov 08, 2022 - updated by Lauren Magnuson - view change
- VHS Replacement and Weeding (Media Library Project)
Nov 02, 2022 - updated by Shana Mendez - view change
- 2022-10-25 CDA Meeting notes
Oct 25, 2022 - updated by Natalya Serge Magazino - view change
- Cataloging Special Collections and University Archives
Oct 21, 2022 - updated by Elizabeth Rallos - view change
- Staff Original Thesis Work (ScholarWorks)
Oct 21, 2022 - updated by Elizabeth Rallos - view change
- Professional Tools
Oct 21, 2022 - updated by Elizabeth Rallos - view change

Contact CDA/Get CDA Help

- Collections Purchase Requests: Collections Purchase Request Forms
- All Other Issues: Email cda-issues@csusm.edu

Quick Links for CDA

- Zoom Instant Meeting Room Instructions
- Anonymous Feedback Form (for CDA Members)
- Listserv Management (e.g., for CDA-L)

CDA JIRA Management

- CDA Issues JIRA (for orders, tasks, etc.)
- CDA Issues My Open Issues
- JIRA Order Processing
- LINKRESOLV JIRA (for linking issues in Primo)
- CDA JIRA Projects
- Working with Tickets in JIRA

COVID and Remote Work

- Fall 2020 Readiness Roadmap
- COVID Checklist
- New COVID Workflows

Library Technology Initiatives and Development / Projects - Completed

History and Library Collaboration on CMS for Students

Created by Ian Chan, last modified on Oct 23, 2021

Overall Status: **COMPLETE**

Project Site: Jira Project Site

Project Pages

Omeka and Wordpress Support for the CSUSM History Master's Program - publicly accessible via L-Space

WordPress - Student CMS

Implementation Tasks

Key	Summary	T	Created	Updated	Due	Assignee	P	Status
SCMS-16	cURL connection problem from WP Network Admin pages	✓	Feb 26, 2021	Mar 03, 2021		Ian Chan	🔴	DONE
SCMS-15	Update Student Wordpress Settings, Themes, and Plugins	✓	Feb 04, 2021	Mar 20, 2021		Ian Chan	🔴	DONE
SCMS-14	libwpprod1: Deploy Student Wordpress into Production	✓	Oct 06, 2020	Feb 26, 2021		Roger Delgado	🔴	DONE
SCMS-13	libwpdev1: Create Student Wordpress Instance for development server	✓	Oct 06, 2020	Feb 26, 2021		Roger Delgado	🔴	DONE
SCMS-12	Wordpress Core and Themes updated	✓	Aug 17, 2020	Aug 17, 2020		Ian Chan	🔴	DONE
SCMS-11	Test Jetpack's Global Settings	✓	Apr 02, 2020	Feb 26, 2021		Jerry Compton	🔴	DONE
SCMS-10	Login page	✓	Mar 27, 2020	Feb 26, 2021	Mar 30, 2020	Jerry Compton	🔴	DONE
SCMS-9	"Per Page Sidebars" plugin abandoned	✓	Mar 24, 2020	Feb 26, 2021		Jerry Compton	🔴	DONE
SCMS-8	Test Ldap alternatives	✓	Feb 12, 2020	Feb 26, 2021		Jerry Compton	🔴	DONE
SCMS-7	Switch to new Ldap plugin for WordPress	✓	Feb 12, 2020	Feb 26, 2021		Amanda Dalgleish	🔴	DONE
SCMS-6	Create dev instance	✓	Feb 12, 2020	Feb 26, 2021		Roger Delgado	🔴	DONE
SCMS-5	Replace the "Wordpress Social Login" plugin	✓	Oct 04, 2019	Feb 26, 2021		Amanda Dalgleish	🔴	DONE
SCMS-4	Adding features	✓	Jun 03, 2019	Feb 26, 2021		Jerry Compton	🔴	DONE

Project Team

Project Lead: @Ian Chan, @Sean Visintainer

Team Members: @Amanda Dalgleish, @Khuong Vu, @Roger Delgado, @Steven Espinoza

Informed / Other Stakeholders: @Jennifer Fabbi, @Carmen Mitchell, @Judith Downie

Project Resources and Supporting Documentation

- https://wordpress.org
- https://omeka.org
- https://wp.csusm.edu
- https://omeka-classic.csusm.edu
- https://omeka.csusm.edu

Project Pages

Why are we doing this?

The University Library at CSUSM would like to partner with the CSUSM Department of History in pilot project to provide the technological infrastructure required by the specialized content management systems (CMS) that History Master's degree students utilize for their final thesis projects. The main outcome of this partnership is to better facilitate archiving of master's projects, give the History students more stable and persistent web hosting, and set up scalable workflows to accommodate program growth.

Goals and Scope

Must Have

- Provide initial setup of Omeka or Wordpress websites on CSUSM Library web servers for History Master's degree students to utilize for their final thesis projects
- Facilitate the creation and deactivation of user accounts for History Master's degree students on Omeka and Wordpress
- Ensure the stability and security of the Omeka and Wordpress applications
- Provide Omeka and Wordpress themes and

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