



Collaborative Workflows

in Hybrid Environments

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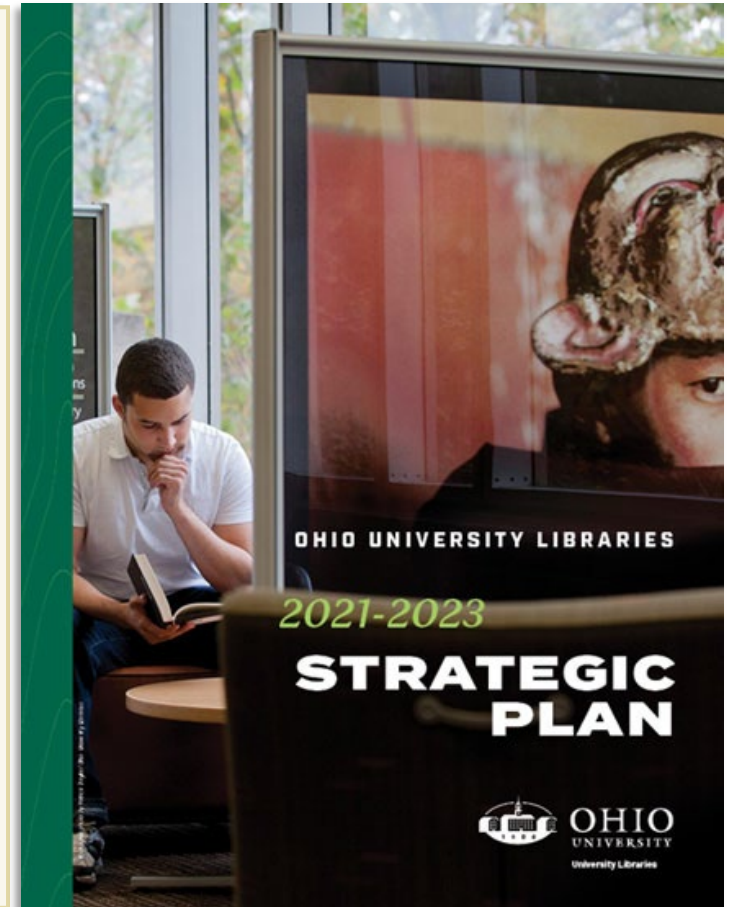


Organizing, Communicating, and Instilling Ownership

*Techniques and observations from
the pandemic and beyond.*

Introduction

- ▶ Both pre- & post-pandemic hybrid experience
- ▶ Pandemic-era strategic planning project
Primary inspiration
- ▶ Watch for the hybrid focus icon
This is where we will step back and examine how a topic deserves special consideration for hybrid environments



Overview

Three separate & interconnected aspects of maintaining strong collaboration:

- ▶ **Organizing**
Documents, working group structure, and timeline
- ▶ **Communicating**
Accessibility, interactivity, and beyond the meeting
- ▶ **Instilling Ownership**
Team Leadership approach, participation, and tying it all together

Organizing

Document Structure

▶ Why be rigid?

Accessible “in the moment”
Structure = Transparency
Structure = Freedom

▶ Establish a **README** guide

Place in all major root folders
Make directories clickable

...but how much? Our approach:

- Parent directory (OneDrive)
- Subgroup working docs kept within subgroup folder
- Preestablish folder for sharing docs with broader institution
- Minutes & agendas filenames prefixed with date i.e., YYYY-MM-DD (ISO, n.d.)

Organizing

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📁 [Document Library](#)

Access via [Teams](#) and [SharePoint/OneDrive](#)

All subdirectories accessible from these two access points have permissions inherited

Root accessible by everyone in the following groups:

- SPCC Committee Owners
- SPCC Committee Members (includes EC)

This is a guide to the SPCC's group OneDrive folder structure. Subdirectories will likely expand as we begin to pull findings together for the final report.

📁 [SPCC ALL Staff Shared Folder](#)

Accessible via [Teams](#), [SharePoint/OneDrive](#) & [SPCC Portal Page](#)

Accessible by members of the following groups:

- SPCC Committee Members (includes EC)
- All Library Staff
- Regional Campus Libraries Interest Group

Purpose: Single point of entry for All Staff to browse strategic planning docs. When sharing from folder, create link and set for “people with existing access”. Same existing access applies to subfolders referenced in this folder ([SPCC Meeting Notes & Agendas](#) and [Subcommittees](#)).

All Other Subdirectories

Other directories in Document Library inherently accessible by:

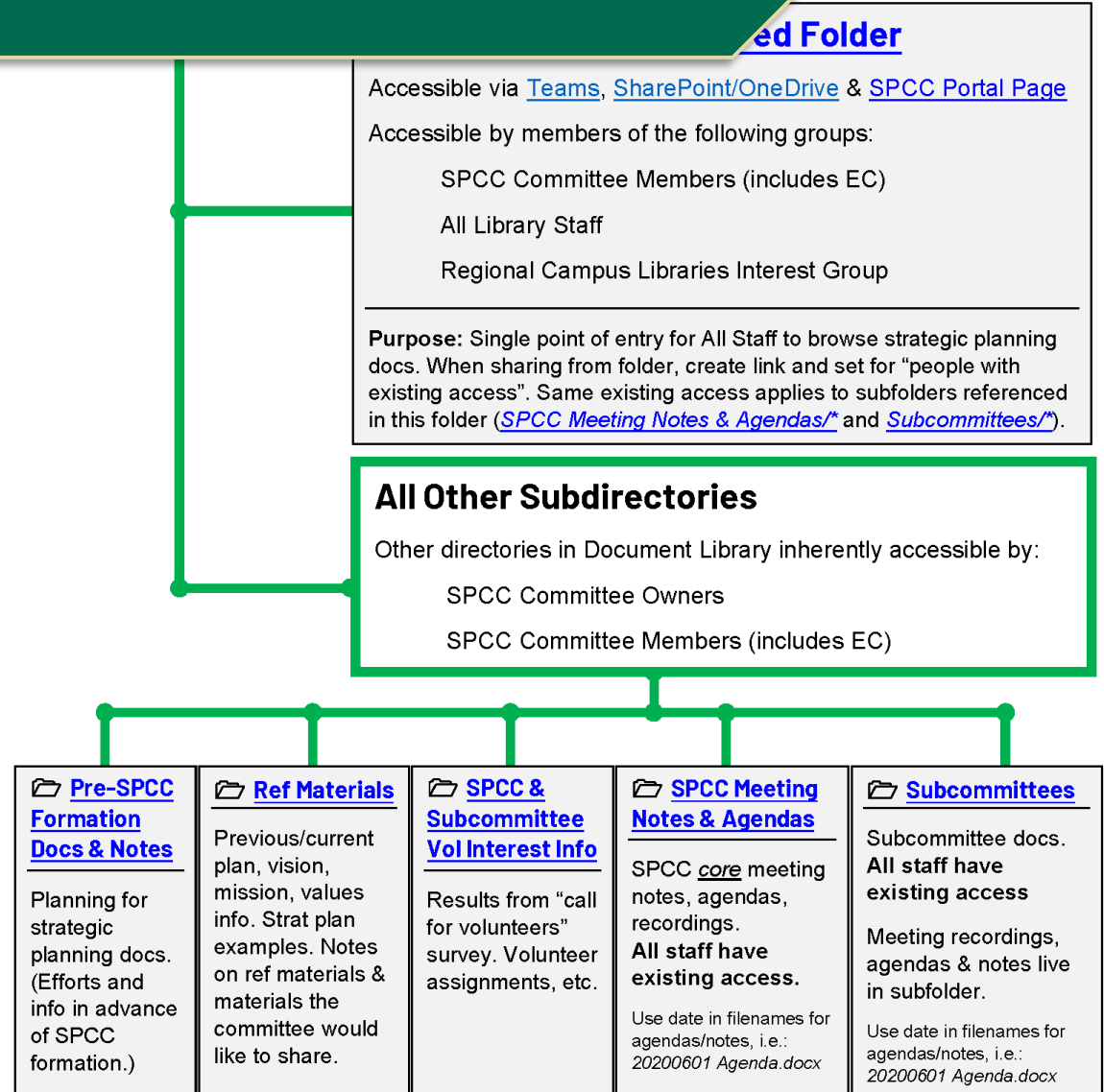
- SPCC Committee Owners
- SPCC Committee Members (includes EC)

Organizing Document Structure

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group OneDrive folder structure. Subdirectories will likely expand as we begin to pull findings together for the final report.

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Organizing Document Structure

- ▶ **Why be rigid?**
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Structure = Freedom
- ▶ **Establish a README guide**
Place in all major root folders
Make directories clickable
- ▶ **Mind those file permissions!**



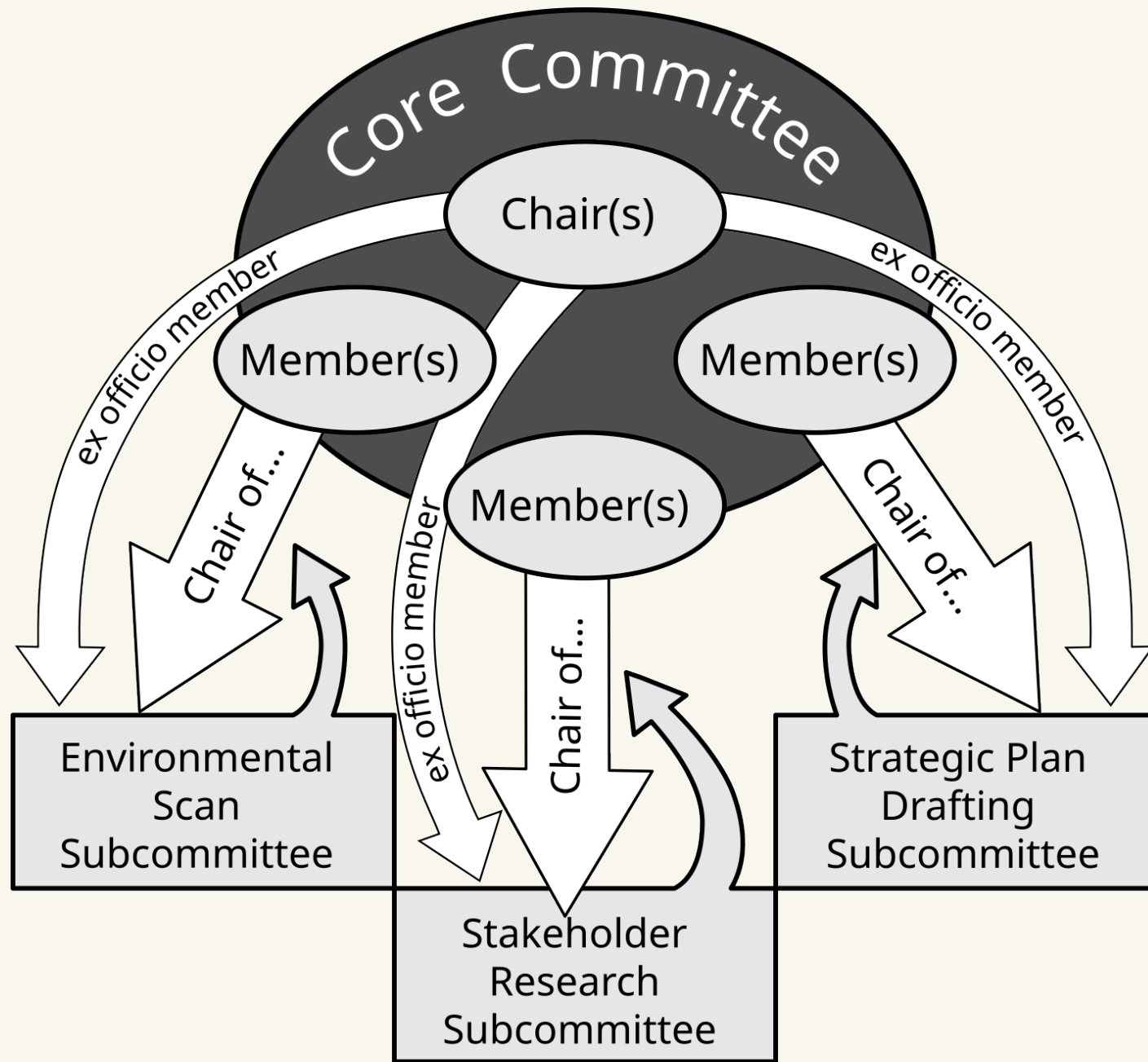
Note. Image credit (Confetti, 2019)

Organizing

Document Structure



- ▶ **Minimize Disadvantages / Equalize Access**
Days of relying on someone dropping by for a hard copy are long gone
- ▶ **Practice, Practice, Practice**
Even those typically in-person will benefit



Note. Illustration credit (Mathuews & Spellman, 2023)

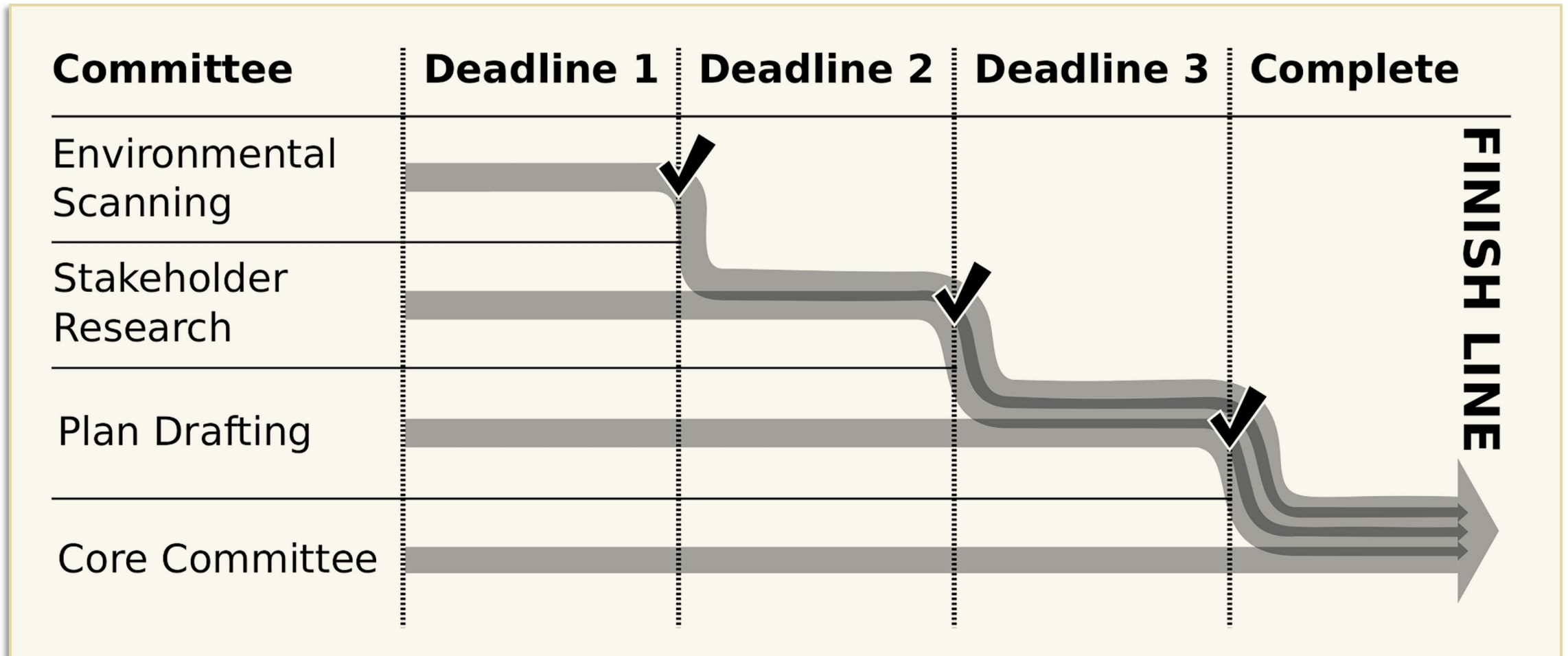
Organizing

Working Groups



- ▶ **Co-chair leadership**
Eases cognitive load
More access for all members to a holistic view
- ▶ **Subgroups divide & conquer large projects freely**
Leaders can pull in any members, or even staff with other specialties for one-off consults, without geographical barriers
- ▶ **Not barriers, more like playing fields**

Organizing Timeline



Note. Illustration credit (Mathuews & Spellman, 2023)

Communication Plan

During Meetings

- ▶ Read all questions aloud
- ▶ Keep an eye on contrast
- ▶ Record meetings
- ▶ Real-time captions & auto transcriptions
Fantastic tools, *but still have a notetaker!*
- ▶ Decide, as a group, on standards
Cameras on or off? Raise hand each time? When to use chat?

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Note. Credit (Rintel et al., 2021)

Communication Plan During Meetings

Chat

Hand Raising

Agenda

Recording

Moderator

Support

CHARMS

FOR REMOTE AND HYBRID MEETINGS

Hybrid Focus

CHARMS

Chat

How should we use chat, and is everyone joined on their own device to use it?



CHARMS

Hand Raising

Should remote and local people take turns using the hand-raising control or just jump in?



CHARMS

Agenda

What are the goals and agenda, and have people had time to prepare?



CHARMS

Recording

Should we record, has everyone agreed, and where will shared notes be?



CHARMS

Moderator

Who will moderate the agenda, introductions, and questions, and champion remoteness and accessibility needs?



CHARMS

Support

How are we supporting one another? Have we included time for check-ins? Have we ensured room devices are on from beginning to end?



Note. Credit (Rintel et al., 2021)

Communication Plan Interactivity

Hybrid
Focus

Brainstorming Concepts

- ▶ Opportunities for fun
- ▶ Google Jamboards
Great way to conduct breakout sessions & gather feedback

Sustainability

How can we sustain relationships with users through outreach and communication?

If we had more clear policies, guidelines, and workflows within library - we could be more sustainable with our time and efforts.(connection with each others-units)

better communication between staff helps us survive as an organization

Maintaining/creating connection during Covid while we don't have as much in person presence

our community is aware of our incredible recycling efforts, we are a point of pride for our green building and practices.

Sustainability = efficiency, retention, re-use, save \$\$.
Through connection, OhioLINK, other libraries, other units on campus, each other (dont reinvent wheels)

Improved interdepartmental communication - sometimes I feel so disconnected from the work being done elsewhere in the library, particularly while working remotely.

Create an outreach campaign that sustains relationships with users throughout their academic careers/Time at OU.

Discoverability

patrons know that we exist, and what our purpose is

promotion of collections and services.

anyone can find out what we have in our collections without a payroll.

building relationships with faculty to meet students' needs & share resources

Finding community partners to increase the reach of our programming & local resources

Discoverability= awareness, outreach (both passive/active).
Through connection: HUCE! e-resources working well within each other, relationships, consistent message

Reimagine liaison services to build connections with users.

Create an outreach campaign to help new students, faculty, and staff connect with/discover the library.

Space

How can we design space to help users connect with our resources?

have many different kinds of spaces for many different kinds of uses, spaces that can change for need.

have spaces faculty and students can use to meet

A HUGE screen (mini viewing space) that is interactive
<https://library.auraria.edu/discoverywall>

Versatile space that can accommodate the changing needs of researchers

How do we help users make connections with collections, each other, and us in our virtual space (web pages, etc)

Communication Plan Interactivity



Providing Input on Drafts

- ▶ Opportunities for fun
- ▶ Google Jamboards
Great way to conduct breakout sessions & gather feedback

al bias and structural racism to make
ctions, equitable policies, and

the community through the intentional
aces, experiences, and resources for
from library and higher education

olve approaches and modalities to
fy the critical and creative inquiry
n environments to nurture life-long

munities by celebrating, sharing, and
ges of our campuses.

nice! clear and important.

what's a modality?

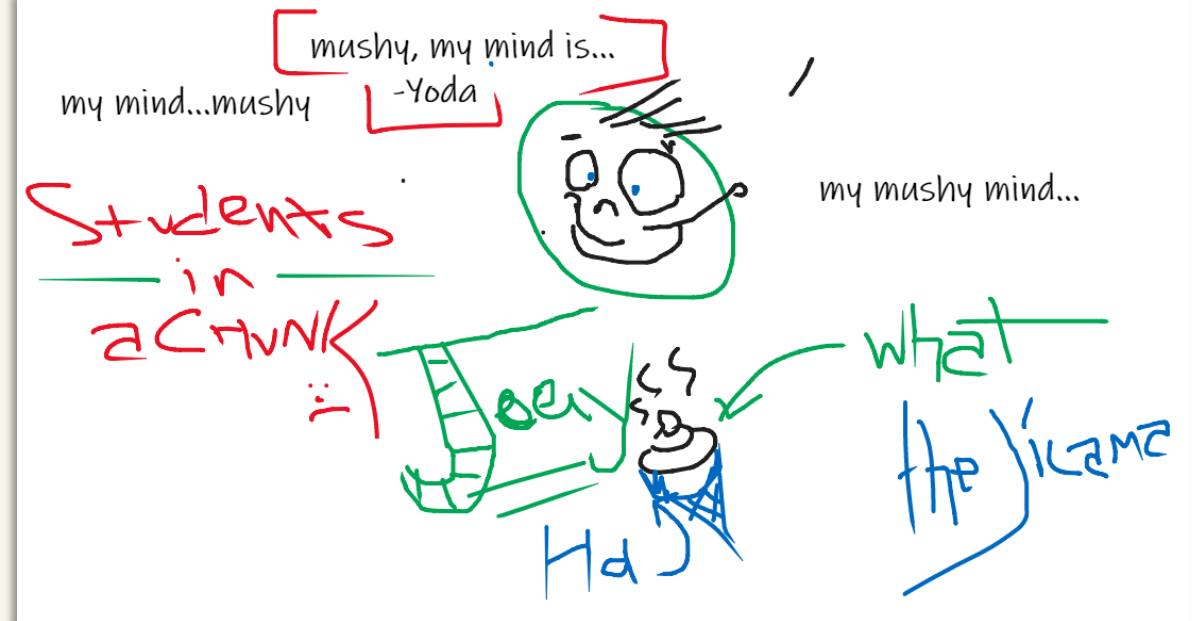
interesting, discuss why not use "appalachia" in this language? Or does 'cultural heritage' make that point.

Preserve, collecting, cultivating, sharing, etc.(last bullet)
Seems like so much is missing.

Communication Plan Interactivity

Hybrid
Focus

- ▶ **Opportunities for fun**
- ▶ **Google Jamboards**
Great way to conduct breakout sessions & gather feedback
- ▶ **Microsoft Teams Whiteboards**
Not as robust as Jamboards
Nice for jotting down ideas & sketching



Communication Plan **Beyond Meetings**

- ▶ **Establish an asynchronous repository of “updates”**
In our case, this was a simple “private” LibGuide Blog
Mirror communications, announcements, and post about new content
- ▶ **Create a page to tie it all together** (utilized a “private” LibGuide)
List working group members, timeline, links to documentation, and
a permanent anonymous feedback opportunity
- ▶ **Reference the point(s) of access frequently**
We mentioned it at all staff meetings and internal communications

Ownership

Agendas & Prework

- ▶ **Always have an agenda**

In our case, we established a routine agenda that was largely the same each meeting with small additions

- ▶ **All discussion items should be presented beforehand**

Opportunity for meeting “prework”

- ▶ **Avoid introducing topics staff are unprepared for**

Without generating their own ideas beforehand, others might latch onto a single voice for the sake of harmony, narrowing the decision framework.

(Larrick, 2009)



Hybrid
Focus

Ownership

Team Leadership

- ▶ Interdependent members who work to achieve a common goal
- ▶ All members take turns leading
- ▶ Locating a leader in remote/in-person environments for continuity

A Team Leadership approach can be especially effective for complex tasks in virtual or remote environments.

*(Hoch & Kozlowski, 2014;
Muethel et al., 2012)*



Ownership Opportunities Throughout

- ▶ Establish a strong structure that keeps the project on the rails while allowing freedom in the actual work
- ▶ Decide, as a group, on your meeting protocols C. H. A. R. M. S.
- ▶ Find interactive approaches to communication and project work that everyone can equally participate in
- ▶ Team Leadership Approach
- ▶ Many tidbits of good advice and best practices are applicable regardless of the work environment

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Conclusion

Thank you!

Want to continue the discussion?
Reach out to us!

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