


Fall 2012

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Recommended Citation

Dunn, Melanie J. (2012) "Wikis: The Perfect Platform for Library Policies and Procedures," *The Southeastern Librarian*: Vol. 60 : Iss. 3 , Article 3.

Available at: <https://digitalcommons.kennesaw.edu/seln/vol60/iss3/3>

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Wikis: The Perfect Platform for Library Policies and Procedures

Melanie J. Dunn

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Introduction

The University of Tennessee at Chattanooga (UTC) is a public university serving a population of approximately 11,400 students that offers degree programs through the doctoral level. UTC's Lupton Library provides for the research needs of the institution through a wide array of resources and services ranging from bibliographic instruction classes and video tutorials through research guides and interlibrary loan. As the Library's services continue to multiply and expand, adapting to the needs of its users, library personnel require easily accessible, in-house documentation to navigate this tide of change and stay current with updates in workflow, procedures, and processes. From instructions on how to handle cash transactions at the circulation desk, to detailed scanning procedures for interlibrary loan, transparent documentation can ensure consistent performance of duties, reduce time-consuming questions on the order of "how did we do this last time?," and mitigate the impact on productivity when experienced staff leave.

WIKI: or What I Know Is...

The term wiki, derived from the Hawaiian adjective "wiki wiki" meaning quick or fast, was coined by Ward Cunningham who created the original WikiWikiWeb for the Portland Pattern Repository (Leuf, 2001, 15). Touted by Cunningham as "the simplest online database that could possibly work" (Cunningham, 2002, June 27) "wiki" is alternately used to refer to both a wiki website and the software used to create and maintain it and was designed to allow multiple users to collaborate in its development (Klobas 2006, 3). Wikipedia is perhaps one of the best examples, as well as the most recognized, of wikis. The website, created in 2001 as an encyclopedic reference source, includes more than 21,000,000 articles in 280 languages and has more than 85,000 current contributors (Wikipedia, 2012, Wikipedia:About). Wikis provide a collaborative space for many people to contribute and edit information, thus serving as an ideal repository for a library's manuals and guides which require continual revision.

In *Web 2.0 for Librarians and Information Professionals* (2008), Kroski describes wiki features and software, and how libraries are adapting wikis for their purpose. She includes the Library Success Wiki (www.libsuccess.org) as

an example of a participatory wiki where libraries share their collective knowledge about successful programs and other innovative ideas useful to the library community at large.

Literature Review

Two exploratory studies of wikis in libraries are provided by Bejune (2007) and Chu (2009). Bejune illustrates the variety of wiki usage in libraries, developing a framework for classifying wikis using Computer Supported Cooperative Work (2007, 27), an area of computer science research that examines how computer technology can support collaborative work. Using examples of wikis collected from three resources – Library and Information Science literature, Library Success wiki, and three professional listservs – he classified them into four distinct categories: one, collaboration among libraries; two, collaboration among library staff; three, collaboration among library staff and patrons; and four, collaboration among patrons. Of these, nearly 80% of the examples were included in categories one and two. Examining the reasons why wikis are predominantly used in these two categories, Bejune concludes that two factors might be in play: a strong history of collaboration and cooperation within libraries, and the service orientation of the profession itself (2007, 32). He suggests three possible reasons why wikis are used less in the library community to collaborate with patrons and for patron to patron collaboration: one, historically and ongoing, the librarian patron relationship has been one-way only, with the librarian serving as gatekeeper and facilitator – not a true cooperative partnership; two, library concerns about authority and liability issues; and three, wikis as a tool perhaps support the purpose of categories one (collaboration among libraries) and two (collaboration among library staff) a little better (2007, 33,34).

Chu's study was based on two surveys; one set for libraries using wikis and the other for libraries that were not. Sixty libraries were surveyed with a response rate of 80% (48 libraries). Twenty libraries were currently using wikis, thirteen were planning to implement and fifteen had no imminent intention of using a wiki. Of the libraries currently using wikis, the highest rated response for using was "To enhance information sharing among librarians" (Chu 172). Among the responses for difficulties encountered implementing wikis, "Low participation rate" scored highest, while "User's lack of knowledge about wiki", "Managing transition from one software to the

other”, “Others”, and “Difficulty in promoting new technology” came in 4, 4, 4 and 3 respectively (Chu 173).

Current library literature also provides examples of libraries that have implemented wikis to host departmental documentation. Two such are “Putting Wikis to Work in Libraries” by Nancy T. Lombardo, Allyson Mower and Mary M. McFarland and “Not Just a Policies and Procedures Manual Anymore: The University of Houston Music Library Manual Wiki” by Tammy Ravas. Lombardo describes four ways wikis have been used at the Spencer S. Eccles Health Sciences Library at the University of Utah: strategic planning, collaboration on a grant proposal, public service policies and procedures, and campus committee work. Regarding the creation of the Public Services department manual on the wiki, the authors relate how the original manual was first copied and pasted from a Word document into the wiki, a table of contents was inserted and then supervisors were adjured to collaborate, review and edit as necessary (Lombardo 139). One difficulty that arose related to supervisors’ unfamiliarity with formatting and editing. The authors conclude that wikis can be a helpful collaborative tool, but staff need time for training and experimentation with the technology in order to achieve a comfort level in contributing to the wiki (Lombardo 144).

The case study by Ravas describes how the University of Houston Music Library’s intent in implementing a wiki was fourfold: one, to house and improve their current policies and procedures manual; two, to serve as a conduit for training materials; three, to create a record of problem issues in daily operations; and four, to serve as a data collection form for statistics such as gate-count. Their wiki, originally implemented to host the library’s policies and procedures manual, burgeoned into a tool that also included a discussion log to record problems relating to library services such as the copy machine and as a way to document student assistant progress.

Background

The University of Tennessee at Chattanooga’s Lupton Library wiki was implemented by the Head of Instructional Technology (IT), Jason Griffey, as a web tool to host documentation for the new library building project, which is slated to be completed in the Fall of 2013.



Figure 1. Visual presence of the wiki on UTC Lupton Library’s homepage.

The site expanded from there to include committee and taskforce meeting minutes, department documentation, standard forms, and project updates. Originally skeptical of the wiki’s utility, the author became a believer after witnessing how effectively the wiki permitted efficient maintenance of department documentation that is in constant need of updating. Policies and procedures manuals, process guides, even those handy little instruction sheets, can be saved here and are available to any employee with a question. The primary appeal of a wiki as a content management tool is its simplicity; very little, if any, formatting is necessary; the focus is on text and enhancement options are minimal.

Training

One essential aspect is to have an IT staff member available to provide basic training on the use of the wiki. From the fundamentals of logging in, navigating around and editing the wiki, to creating outlines for organizing information and inserting links to other documents, a knowledgeable IT staff member serves an essential role in allaying any concerns of wiki neophytes. Lupton Library’s Staff Development Committee sponsored an in-house session on wiki basics, giving library employees an opportunity to become familiar with the fundamentals of this application. For staff members who understand the rudiments, but still need some guidance, Lupton Library’s Reference Department maintains a “How Do I Contribute to this Wiki?” section on their pages.



Figure 2 Navigation toolbar with search option on Lupton Library’s wiki.

Once initial training has been provided, either through training sessions or one-on-one assistance, staff members have access to post their documents and edit their pages as

needed. In most institutions, the wiki is set up so that anyone with access can log in and add or edit pages. Libraries challenged by the disparate technological skills of their staff often discover that wikis level the playing field, enabling everyone in the organization to provide input on content. This ability to contribute empowers staff and benefits any library that wishes to reflect the collective knowledge of its employees (Farkas 2007, 67). Wikis generally include a Recent Changes page where recent edits are listed, so additions and other changes can be tracked on entries.

Editors can also view previous versions of pages they've modified using the History tab and can restore if necessary. If the senior leadership recognizes the merits of social software such as blogs and wikis, and are active contributors, most employees will be motivated to give it a try.

What To Include

What types of documentation should be added to a Wiki? From someone who was initially reluctant to post material that had previously been primarily internal, the author came to embrace the Wiki's transparency. In the Interlibrary Loan unit, the project required staff to review the ILL manual and select that content worth transferring. After deciding what to include, an IT staff member then assisted by creating a simple outline with headers to organize the material. The author was then able to post ILL policies and scanning instructions, which was followed by other procedures such as processing and packaging mail, handling overdues and lost book invoices, as well as including links to corporate proprietary software documentation. As with all organization documentation, this continues to be a work in progress.

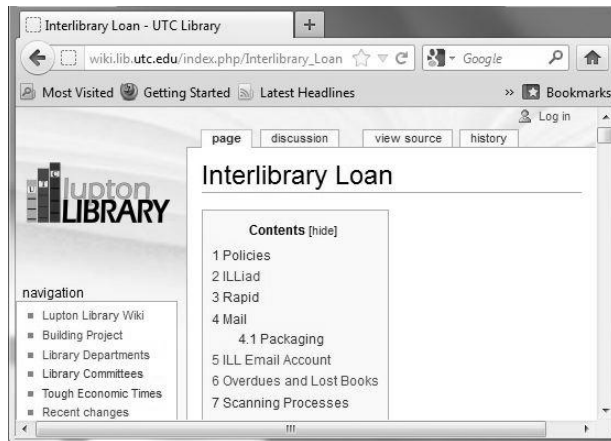


Figure 3 Lupton Library's Interlibrary Loan wiki page with content outline.

Some examples of other library wikis that include policies or procedures are listed below:

- Albany County Public Library, Laramie, Wyoming
<http://albystaff.pbworks.com/w/page/1693188/FrontPage>
- Antioch University, Keene, New Hampshire
http://www.seedwiki.com/?wiki=antioch_university_new_england_library_staff_training_and_support_wiki&page=
- North Metro Technical College, Acworth, Georgia
<http://nmtclibrary.pbworks.com/w/page/5615545/FrontPage>
- University of Connecticut, Storrs, Connecticut
http://wiki.lib.uconn.edu/index.php/Main_Page

Circulation desk procedures also lend themselves well as prime material for the wiki. Many library staff members outside the Access Department are required to assist at the circulation desk and questions commonly arise about circulation procedures when a supervisor is not available. In this situation, the wiki is always an option for consultation. Building operations, reserves, money and billing, and patron policies are just some of the responsibilities covered under Access. Each library department at UTC-Access, Administrative Office, Information Technology, Reference and Instruction, Materials Processing and Special Collections-has posted documentation relevant to their needs.

Wikis can also serve as a knowledge base for frequently asked questions about common problems such as printing in the library, laptop issues, and computer applications. It also serves as the site for the library's emergency plan. Any documentation that ensures productivity and continuity should always be considered for inclusion. It is apparent that there is a recognized demand for such library documentation. On the ILL-L listserv for November 9, 2011, there was a post requesting examples of Interlibrary Loan training guides from other libraries. The post received fifty responses that same day, most of them seeking examples of training guides themselves.

One helpful approach to the decision of what to include is to view it as an online instruction manual for a new employee. A library needs to identify and disseminate all repeatable tasks that are integral to its operations. This way when experienced employees leave, their expertise does not walk out the door with them. The ideal goal should be that if everyone in the department were to depart, those who come behind would be able to carry on based on the documentation available of processes and procedures. Of course, sensitive information such as passwords and contact numbers should not be generally available. In Lupton Library's wiki, it is possible to link to a secure internal network which can include such information, but is only available to those individuals with login privileges.

When creating the department manual from scratch, the wiki is the perfect place to begin. Consider the guidelines

below when drafting the different processes in the department workflow:

- Describe the process and its purpose
- Delineate the steps involved; the more detail, the better
- Relate this process to others, if necessary.

Don't be too concerned about how polished the material is; typos as well as grammar and punctuation can always be corrected. It's much more important that the material added comes from the acknowledged expert in a particular department. For example, in the Lupton Library, the Circulation Supervisor is, hands down, the authority on cash register transactions. He created the original instructions, posted them to the wiki, and updates them when necessary. While the Dean and department heads set policy and review procedures, front line staff are in a much better position to recognize when established routines should be incorporated into a reference manual to serve as accepted protocol.

Utilization

A wiki that is not used is, of course, a wasted effort. Thus, the challenge is getting everyone to use the wiki for reference. When staff ask questions about routine processes that are not performed on a regular basis, supervisors should refer them first to the wiki. Encouraging coworkers to consult wiki documentation before interrupting others in their work will save time and promote job skill acquisition. When department heads question a policy or procedure, refer them to the wiki and request their feedback. As a collaborative tool, the wiki can't be beat. One of the great benefits is the ease with which information can be updated.

Because the wiki serves as an online repository of commonly used information, it must be consistently monitored for inaccuracies and necessary updating. This requires commitment from the entire department to

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maintain its relevancy. A useful check for inconsistencies is to assign portions of the documentation to staff specialists and have them follow the outlined steps. They then become responsible for reviewing these sections as a job duty. Outdated information is usually identified pretty quickly and suggested changes forwarded to the supervisors. Identifying processes and procedures that could benefit from clarification, i.e. pinpointing errors and omissions, appoint staff with similar skills to trade sections, thus allowing a fresh set of eyes to review it. Another staff member can often spot issues others have missed and provide a different perspective.

One of the best training assignments for a new manager is to review and edit an existing manual (or to create one, if necessary) after the initial orientation to the department. Trying to follow sometimes outdated written instructions and to buttonhole staff and department heads to obtain explanations of established precedence on processes can be an incredible learning experience, immersing them in the department as nothing else can. Having personally undergone this trial by fire, the author heartily recommends it as a way to become the resident expert in your area.

Conclusion

Peter Drucker, late renowned authority on management, once noted "Knowledge has to be improved, challenged and increased constantly, or it vanishes;" perfectly expressing the transience of institutional knowledge and the necessity for continually revising and updating organizational content. A wiki is the perfect platform to share a department's documentation, and can be a huge timesaver for a library. It's a communication tool that adds value to the library by allowing those with expertise in a given area to share their knowledge and avoid having to continually "reinvent the wheel." Train staff on how to use the wiki, organize the documentation with a simple outline, lead by example in contributing and utilizing the wiki, and reap the benefits.

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