Best Practices for Social Software in Libraries

We've revisited some older tools and looked at some newer ones. In concluding, instead of a list of best practices for each specific tool, I thought it would be useful to focus on broader best practices in a 2.0 world. Use these as a guide to move forward with a library blog, an IM reference service, a wiki, or any of the other tools covered here or those we haven't even heard of yet.

These tips seem a lot different than when I started in libraries and nothing like I was taught in library school. With societal change, however, come new thinking and new ways of looking at old problems. Web 2.0 tools won't solve all of your problems, but you may find some solutions that will make your work life easier. You might also find more time to engage with your users than ever before.

Remember Your Mission and Vision

We're not 2.0 for the sake of 2.0. We're not blogging because all the cool libraries down the street are doing so. We're implementing carefully chosen social tools that further the mission and vision of the library. Not only does this principle ground your technology planning correctly, it paves the way for buy-in at all levels. Moraine Valley Community College's posted podcast policies are a good example of how to connect the use of a 2.0 technology back to the mission and vision of the library. As librarians plan and create new methods of delivering services, this is an important idea to keep in mind. Note that each point in the Moraine Valley example supports the mission or key values of the library: enhancing the classroom experience,

participating in library events, and keeping an archive of what has happened at the library:

> The Library Event PodCasts are intended to be a flexible, portable record of the events held within the Moraine Valley Library. As such, they are intended to enhance library programs and the larger Moraine Valley curriculum in the following ways:
>
> - They fulfill the library's mission by "providing information literacy instruction and support across the curriculum" and "collaborating with faculty and others to develop innovative services and programs."
>
> - They enhance the classroom experience by providing expert views on challenging and timely subjects.
>
> - They provide an opportunity for students and community members to participate in library events even though they may not be able to visit the events in person.
>
> - They act as an ongoing record of library events for future use.
>
> - These events are hosted by the library in the spirit of public discussion, open debate, and intellectual growth. The views expressed by panel members, lecturers, or audience members are their own and are not necessarily the official views of the

Moraine Valley Community College board of trustees, staff, faculty, or administration.[1]

Be Selective

The choices for social tools, as evidenced by the coverage in both this report and last year's, can be overwhelming. The same can be said for attending workshops and conference presentations about Web 2.0. It's easy to think your library should suddenly take on every tool and every new service that blogging librarians and conference speakers are discussing. That should not be the case!

From all the tools available, choose those that might best serve the needs of your users and that fit your library's mission for technology. Beware of technolust (see below)—it's an easy trap to fall into as we hear about all of the wonderful things social software can do. It's more important to plan and stage projects wisely, not try to start a blog, open a library branch in Second Life, and build a wiki for your users all at the same time.

Create a 2.0 project timeline featuring the tool or tools you'd most like implement. Make it short but detailed: research, exploration, protyping, testing, implementation. Follow the rest of the best practices in this chapter. Create an emerging technology committee or tech trend team to monitor the trends detailed in chapter 3 as well. Have good meetings—without endless agendas that lack action plans and deliverables. Make solid decisions based on evidence. Use the Reading List in chapter 9 to find out more and explore. Mine the biblioblogosphere for even more useful evidence and "in the trenches" thinking.

Balanced planning, short project timelines, and evidence-based decisions will create a practically fool-proof implementation strategy for your social library.

Create a Prototype

Want to sell your social software project to your boss, your director or dean or governing body? Start with a prototype. Brian Mathews said it well at Designing Better Libraries:

> When I speak with librarians who are excited about new social technology, they often mention the roadblocks they encounter. The best advice I can give is to use prototyping. Build a proof-of-concept, test it with a few users, and then present it to the powers-that-be. Instead of giving them the chance to shoot down your idea, let them see it first hand, educate them about it, and show them see how it can be adapted. The secret is user needs—if you can demonstrate how your idea addresses a patron (or staff) need then you'll have greater chance of success.[2]

Many of the tools in this report are free to use for experimentation and discovery. Within minutes, you might create a prototype Ning network or embedded Meebo Me widget to show off at the next big meeting. Mathews's points are solid: educate the powers that be and demonstrate how users benefit from the prototype. And administrators–trust your staff to point the right way. Listen to them.

Encourage Conversation

Make sure comments are enabled wherever possible. As discussed in the section on conversations in chapter 2, this is a hallmark of any social experience. People want to talk to each other.

Moderate commenting if you must, and establish guidelines for sure, but let the conversation flow openly and as humanly as possible. Participate in those conversations as well, every chance you get. Not only will the experience help you understand social networking, virtual communities, and the technology itself, you'll be learning.

Traditional marketing channels, by their very nature, were highly controlled, one-way messages—created by the library and directed at the consumer. With Web 2.0, you don't control the message—everyone can create and shape the message. The nature of social media is profoundly different from standard channels such as print, radio, and TV. Web 2.0 channels might be better seen as marketing "engines" rather than "channels"—"engines" can energize and add power to your message and spread it in a viral fashion. "Word-of-mouth" marketing is amplified online where it's easy to pass on a message to hundreds of contacts and friends around the world in a fraction of a second.

Darlene Fichter, "Seven Strategies for Marketing in a Web 2.0 World," **MLS: Marketing Library Services** 21, no. 2 (March/April 2007), www.infotoday.com/mls/mar07/Fichter.shtml.

Invite Participation

This is a key element to successful implementation of a social tool in libraries. David Lee King, Virtual Branch manager at Topeka Shawnee Library and blogger at david leeking.com, wrote a series of outstanding posts on inviting participation. He encourages libraries to try both passive and active invitations:

- Passive: Allow commenting, offer RSS feeds, be encouraging and friendly.
- Active: Ask your users to do something–click a link, comment, fill out a form, or visit the library.[3]

Participation also carries your message forward. Invite your users to help craft the message of the library. Have them help you tell the story. Involve them in as many creative ways as you can. The library will benefit. Your users will benefit.

Learn the Tools / Teach the Tools

For starters, take a look at the Learning 2.0 course sponsored by the Public Library of Charlotte & Mecklenburg County. (See the Resources box at the end of this chapter.) Any library can adapt this free program, or we could learn from it ourselves individually. Do the course for your library, your consortium, all the libraries in your area, or on a statewide level. For more, see the sidebar by Sean Robinson on Learning 2.0 at the Allen County Public Library.

Try the same for hardware. Have staff bring their newest gadget to a "technology encounter session" staff meeting. Do things first, because staff should be comfortable with tools and technologies early on. Kyle Cook, Nashville Public Library, agreed: "Make sure you spend adequate time with staff so they understand how to use the tools."[4]

Then, be a "Technology Learning Leader" for your users–teaching them about tools and technologies. Make the library the place to be for cutting-edge technology and knowledgeable, savvy staff instruction. Teach blogging, Flickr, MySpace, Facebook, Twitter, and the next tool. I'm reminded of Princeton Public Library's "Gadget Garage"–a cabinet housing gadgets for hands-on play in the library's training room.

For more on training and learning in libraries, don't miss Sarah Houghton-Jan's Library Technology Report "Technology Competencies and Training for Libraries."[5]

Many libraries are teaching social technologies now as part of their user instruction programs. One leader in the field are the trainers at Princeton Public Library in Princeton, New Jersey. I asked librarian and trainer Janie Hermann to share some of her insights about the program.

Teaching 2.0

Princeton Public Library (NJ) has offered computer classes to the public since 1996. They now have an extensive and innovative technology training program with over 25 different classes on a wide range of topics that are taught on a rotating basis. The basics are still covered every month, but classes on the latest Web 2.0 trends and applications have been successful incorporated since the spring of 2006.

In the winter of 2006 the staff of the Technology Training Center, which consists of one full-time librarian and 5 part-time Technology Aides, decided to make teaching Web 2.0 a priority for the next 12 months. The first step was the creation of the Fantastic Freebies program—a demonstration that incorporated many 2.0 sites. This program was created to be a jumping off point for 2.0 training and was initially delivered as a Tuesday Technology Talk in June 2006 and is now offered regularly as a class.

Shortly thereafter we had our first RSS classes and from there we moved on to offering multi-session courses in blogging and flickr in the late summer and early fall of 2006. Over the next 12 months we successfully offered 4–6 sessions on each of these topics and in the summer of 2007 we added podcasting to our class repertoire with plans to add screencasting before the end of the year.

I have spoken with several librarians over the course of the last year who have not been so successful in implementing 2.0 classes and this has led me to ponder the reasons behind our success.

We have had great success with this our Teaching 2.0 initiative for several reasons, one being that we have solid base of classes to build upon and a reputation in the community via our series such as the Tuesday Technology Talks (where we also have had talks on Wikis and other 2.0 technologies to heighten awareness and increase interest in classes).

We also have a very effective PR strategy to promote our sessions, including designing and distributing eye-catching flyers for new classes and having the local press give in-depth coverage of our efforts.

For many years we have had a "take the show on the road" attitude and do outreach to local computer users' groups, the chamber of commerce, job-seeking groups, etc. We offer to come speak on a tech topic of the group's choosing (databases, job-seeking resources, etc) and while we are there we promote our training program. I can not stress enough that the success of Teaching 2.0 has been all about promotion, promotion, promotion and having laid a foundation to allow for this to succeed.

One other initiative that allowed for our success is that we launched our Learn Together campaign at the same time we started our Teaching 2.0 initiative. Many of our staff members were curious about Web 2.0 and wanted to learn more. Our tech center staff is stretched to the limits with our public training program (250+ sessions per year with close to 2400 people receiving training), but

we wanted to find a way to offer 2.0 training to staff. We decided that since much of Library 2.0 is about transparency we should train the public and our staff together in the same sessions.

This has worked much better than we could have ever anticipated and I gave a poster session on this topic at ALA Annual. We regularly have classes where there are 5–6 members of the public with 4–5 members of staff learning together about blogs, RSS and Flickr. Learn Together is meant to supplement staff development and our managers have all been on board with this concept from the time it was introduced. The public love having a chance to chat with staff in a class environment where everyone is equal and learning together and the staff (especially those who work behind the scenes) find it beneficial to talk with our customers during class. (Janie Hermann, Tech Training Librarian, Princeton Public Library, e-mail message to the author, July 13, 2007)

We learned our staff are willing and able to understand the new technologies that our patrons are using. We also learned some specific lessons about presenting this sort of training experience. Next time, we will include the Life Long Learners portion of the PLCMC program—a tutorial that explains the "7 & 1/2 habits" of lifelong learners to help our staff get into the spirit of being self-taught and self-motivated. We will also offer live question-and-answer sessions at least monthly, if not weekly, to help staff understand difficult concepts in person

We received requests to do traditional classroom training on some of the new tools. For example, staff would like to get to know Flickr better now that they are familiar with what the photo-sharing application does. We are planning to schedule instruction on this when people branch off to learn more about their favorite tools.

Robin Hastings, "Journey to Library 2.0," *Library Journal* (April 15, 2007), www.libraryjournal.com/article/CA6431957.html

Give Real World Services a Virtual Space

Use the social tools to give your real-world services a virtual presence. Give each book discussion group a blog. Build a wiki for reader's advisory. Embed a librarian Meebo widget on your "Contact Us" page. Record a podcast tour of your library, or ask your teen group to help make the recording.

Creating an extension of the real world library online can engage users that might only be looking for the library in those spaces. Or the user might not even know the library is even there and that sense of discovery may surprise them. "Hey—I didn't know the library used IM!"

Replace or Improve Outdated Methods

What processes might a social technology replace? Are you building the Librarian's Links page you've had since 1996 by hand? It might be time to automate that page via tagging and RSS. Look at your processes and ponder what might be more efficiently done with technology. Free your time to interact with your users.

Be Mindful of Technolust

Don't let "Oh Shiny!" catch you. As I wrote in *Library Journal*: "The flip side of such mindfulness is technolust. We have all seen it. A librarian returns from a conference, high on the possibilities of that oh so hot technology. Twelve months later, that expensive new technology sits on a dusty virtual shelf. Or a trustee hears of a technology that has changed the workflow of well-known retail establishments and decides the library must have it as well."[6]

Implement technology as a means to serve users, not for coolness. Be wary of a massive purchase of technology as a means to improve workflows, staff productivity and even morale. Purchasing, for example, 15 of the latest and greatest PDA phone for the entire library management group sounds good but do they all need it? Will it help their jobs? Implement well-planned technologies after careful consideration of use, unintended consequences and need.

Tell Stories

Use the social tools to tell the real, human story of the library. A good story is worth its weight in gold in my book—especially those that describe how the library changed someone, how the library improved someone's life, or how the library encouraged a heart. These are the stories that may make or break some libraries in times of budget crunches, or perceptions that libraries aren't that useful anymore. What story can your library teeeeell??? What tools might you use?

Use Flickr to tell a visual story. Use your library blog and as many blog authors as you can to create the voice of the library—a sharing voice that is always present with a new story of what might be happening at the library.

Learning 2.0 at the Allen County Public Library

I've been watching Allen County Public Library in Fort Wayne, Indiana for some time, through the implementation of blogs, wikis, videos on YouTube, and more. I asked Sean Robinson, head of information technology at ACPL, to tell me about his experiences with Learning 2.0 and creating staff participation with social tools. Here's what Sean had to say:

How do you start a revolution? This is a question that I seem to ask myself every time I return from a library conference. I always return having the feeling of being sixty percent inspired and forty percent frustrated. Computers in Libraries 2007 left me with the same feeling. I seem to focus my energy in the inverse order, voicing my frustrations to other coworkers and then doing very little. I realized that this time the revolution had to occur from within and that I was far happier focusing on innovation and strategizing on how to be a successful agent of change. So this is where Learning 2.0 actually got started at the ACPL. Helene Blowers gave her talk about Learning 2.0 at CIL 2007. I listened, got inspired, and ignored my frustrations.

First I needed to educate as many people as possible at the ACPL about Learning 2.0. I talked with our Executive staff about these concepts and the need to expand our existing training programs. I had open forums for staff and talked about Life Long Learning and Learning 2.0. I talked to our Branch Managers and Digital Collaborative Group. (This committee is responsible for all web development.) I blogged Learning 2.0 and the positive impact it was having at other libraries. After this education process was complete I returned to our Executive staff and recommended that we start a Learning 2.0 program and that the Digital Collaborative, with the help of the Training and Human Resource Managers, coordinate and develop this initiative. I suggested that we copy the successful Charlotte Mecklenburg model. The organization agreed and it was now time to move to the planning phase.

The plan was very simple. Steal from as many resources as we could and copy their content and then reap the rich rewards of a highly trained technical staff. The Digital Collaborative Group created a shared online space to organize our thoughts. We brainstormed and created a list of 21 things we thought staff needed to know about. The goal was to make each of these topics a 20-minute lesson. We decided the program would be voluntary and online. Then we each started creating online tutorials for what we believed were the most popular topics.

One of the questions that I hear repeatedly is how we are going to allow staff time to complete these lessons. I started off thinking this was a very important element of the programs success. I have completely changed my mind. Just as the revolution happened for me internally, I believe that same will occur with staff. Staff that are inspired and motivated will find time in their schedule and

those that aren't, won't! This program is about discovery, learning and exploration. What more do you need?

We also talked about promotional ideas for selling the Learning 2.0 idea to staff. During the brainstorming we came up with the idea of buttons that could be collected each time you completed a course. Kay Gregg just took this idea and ran with it. She created Cubical Bling, Learning 2.0 icons that represented the various courses we were planning on offering. Kay and I talked again and thought that these icons of Learning 2.0 would look great on a T-shirt. Kay did some mockups that we have placed on the web.

The next issue that was personally important to me was to figure out how I could add value to Learning 2.0. There are two technologies that I am particularly interested in, videos and screencasting. Just as a screenshot is a picture of a user's screen, a screencast is essentially a movie of what a user sees on their monitor, often with narration and text.

I used Windows Movie Maker for the videocasting and Wink for the screencasting. Wink is a freeware screen-capture and tutorial-creation program. The built-in microphone on my laptop works for the audio portion. One item I did need to purchase was a small USB camera that clips on my laptop. This was under $50. The goal of the screencast is to make it just the right speed for absorbing the information. Not too fast so the viewer gets confused, and not too slow so they get bored.

Overall I think the response from staff has been varied. Learning 2.0 was not heralded as the savior for all our technical training needs, as I had hoped and envisioned it would be. Some staff has been very enthusiastic, while others have been much more cautious—like "when a stranger rides into town on a dark horse" kind of cautious. For some actual staff comments, see the comments under my Learning 2.0 blog.

I have learned that programs like these are very organic in nature. You start with a seed of an idea, and sometimes it grows and sometimes it doesn't. I can see that Learning 2.0 is starting to grow at the ACPL. Another unforeseen result of this program is that it has really helped us identify people who are early adopters and staff that love technology and are excited about learning.

How do you start a revolution?

Step One: Take personal responsibility and do something.

Step Two: Identify other revolutionaries.

Step Three: Make a declaration: "Viva la Revolution!"

[Note: URLs for some of ACPL's Web pages related to Learning 2.0 are found in the Resources box at the end of this chapter.]

Be Creative & Innovate

Start a think tank. Look for creative solutions. Think out loud. Look for ways to innovate in your libraries for your users. With 2.0 technologies, it's easy to make something rather cool. "This is the great thing about all these web 2.0 tools—you don't have to be a website genius. There are tools out there for the rest of us to use," said Kyle Cook, Nashville Public Library, in our discussions about creativity and planning the NPL site.[7]

Have Presence

Jenny Levine said it best at our most recent Roadshow: "Libraries are all about presence within their physical communities—we're so good at this. Now the next step is to take that presence online and offer the same sense of community, vibrancy, expertise, connections, and conversation in a rich and rewarding experience, both on our sites and where our users are."[8]

How can you have presence, librarian? What social tool excites you the most? Start with that one. Find a way to use it to be present in the lives of your colleagues and your users.

Be the Change You Want to Be

I spoke with Kyle Cook about implementing 2.0 tools on the Nashville Public Library Teen Web. His advice is valuable for all of us initiating change with social tools.

> We decided to use Flickr for our pictures. We wanted something that would allow the librarians and add their own pictures without having to go through the web team. Also, the librarians were already familiar with Flickr, so it wasn't too intimidating. Like, del.icio.us, flickr lets the teen staff create their own sets of items—they're controlling the content. It also lets the teens to go in and make comments and maybe link their own photo collections.
>
> We created a prototype to demonstrate our ideas. This prototype showed what we were after and it didn't take long to build—just paste in two pieces of code. Use someone else's flickr photos for the badge. You can use your own del.icio.us account for the link example.
>
> When we pitched the changes to our library managers, we had a rationale for each. That's important. We chose del.icio.us and flickr because they offered a solution to link maintenance and the addition of photos. At the same time, they made maintenance of the site easier. These were problems we had for some time. Showing

your reasons behind changing course and trying something new tells your managers that you aren't just doing something to be cool. Your changes need to have a purpose.

Demonstrate how the tools work—if you don't have access to a webserver, set up a blog that resembles your website. Add the tools to the blog. It is often helpful to show any other libraries that have done similar things. We had lists of other libraries to back us up—but we didn't need them.[9]

Make Time for 2.0

Phil Bradley, Internet trainer, blogger, and author of *How to Use Web 2.0 in your Library*, recently posted a series of questions he's asked when he does 2.0 talks for librarians. Many of us addressing these topics have probably heard these before. His answer to the "How do I make time for these things?" is spot on!

> Yes, actually you do have time. You have the time for several reasons—a lot of these things don't take long to learn—they're designed for people who don't know what they're doing. They're designed so that you can look at it, poke around for a bit and then get on with it. Once you start to use one, you'll be saving time. Put that to good use. Secondly, you have time if you stop doing something else. Nothing stays the same, or at least it shouldn't. If you have repetitive tasks, look around and see what Web 2.0 resource will do the job for you. Repeating searches? Do the search once more, get the RSS feed, end of story. Keep checking email to see if you've got anything? Use a widget to check it instead. Finally, and this will be a shock to the jobsworths out there, but if you have a computer at home, try some of this stuff there. I use my startpage for work/home/hobby; it's useful for everything.[10]

Experience & Play!

Dive in. Explore. Try something out just because. In my talks, I urge librarians to experiment with each tool just to try it out. They might never use it again, but at least they've had the experience. Take the chance to play. Smart Mobs blog recently linked to a report concerning the attitudes of people who participate in online communities:

> Your "Out There" people are the ones who are:
> - Fast followers
> - More flexible
> - Open communicators

- Aspire to greatness

- Looking for new, innovative ideas

- In short—your future leaders[11]

How are you encouraging these folks in your organization? Are there outlets, teams, projects, and work groups that can make use of these attitudes while also acquainting them with your seasoned folk for knowledge transfer? Are you hyperlinked?

Brenda Hough, writing at the NEKLS Technology Blog, illustrates this point well:

> In the last week, I've joined two social software sites . . . Twitter and the Library 2.0 network Bill Drew started on Ning. I have spent a little bit of time playing with each of them. The dollar investment was $0.00 and the time investment was small, too. I'm not sure if either of them will become a part of my regular routine, but I do think it's important to try a new thing now and then.[12]

Participate

Finally, the most important thing I might impart here is for curious librarians to participate. This is the crux of the whole thing: Participation and all those "yous"—those Persons of the Year—are coming together in varying and exponentially increasing numbers around a million+ topics to play out part of their lives online. How will these social connections look after 5 more years of innovation, rapid technological change, faster broadband and more internet access? Will the library be there? I think the social library will. The transparent, hyperlinked library will meet the needs of users at the point of need—in spaces and places we might not yet have even considered. The first steps: Discovery. Play. Participation.

I'd encourage everyone reading who hasn't yet, to experiment with Web 2.0 tools and to think about the future we might build on the concepts of an open, participatory world. I look forward to further conversation. I see great promise for social libraries and the librarians that create help create them.

Resources

ACPL Digital Collaborative
http://acpldc.pbwiki.com

ACPL's Learning 2.0 Bling
http://blog.acpl.lib.in.us/blog/?p=149
http://acpldc.pbwiki.com/incentives

ACPL's 21 Things
http://blog.acpl.lib.in.us/blog/?p=148

Blog Posts on Learning 2.0 at ACPL
http://blog.acpl.lib.in.us/blog/?cat=17

David Lee King on Inviting Participation
www.davidleeking.com/2007/01/03/inviting
-participation-in-web-20

Learning 2.0
plcmclearning.blogspot.com

*Princeton Public Library Tech Classes:
Press Coverage*
www.towntopics.com/aug0906/other1.html

Sean Robinson's Blog Tutorial
http://acpldc.pbwiki.com/Sean's+Blog+Tutorial

Notes

1. "Library PodCast Policies," Moraine Valley Community College Library/Learning Resources Center Web site, http://www2.morainevalley.edu/default.asp?SiteId=10&PageId=1496 (accessed July 12, 2007).
2. Brian Mathews, "Applied Prototyping: Desinging for Buy-in," Designing Better Libraries, July 3, 2007, http://dbl.lishost.org/blog/2007/07/03/applied-prototyping-designing-for-buy-in (accessed July 12, 2007).
3. David Lee King, "Inviting Participation in Web 2.0," David Lee King blog, Jan. 3, 2007, www.davidleeking.com/2007/01/03/inviting-participation-in-web-20 (accessed July 12, 2007).
4. Kyle Cook, e-mail interview by the author, July 3, 2007.
5. Sarah Houghton-Jan, "Technology Competencies and Training for Libraries," *Library Technology Reports* 43, no. 2 (March/April 2007).
6. Michael Stephens, "Technoplans vs. Technolust," *Library Journal*, Nov. 1 2004, available online at www.libraryjournal.com/article/CA474999.html (accessed July 30, 2007).
7. Cook, e-mail interview.

8. Jenny Levine, Social Tools and Libraries Roadshow, Illinois State University, June 6, 2007.

9. Cook, e-mail interview.

10. Phil Bradley, "Web 2.0 Questions I'm Most Often Asked," Phil Bradley's Weblog, June 29, 2007, http://philbradley .typepad.com/phil_bradleys_weblog/2007/06/web-20 -question.html (accessed July 12, 2007).

11. Attention Company, "Out There," Nov. 2006, presentation online at www.attnco.com/outthere/Out%20There %20Presentation.pdf (accessed July 12, 2007); cited in Marshall Sponder, "Characteristics of People Who Participate in Online Communities," Smart Mobs, Dec. 7, 2006, www.smartmobs.com/2006/12/07/characterisitics-of -people-who-participate-in-online-communities- (accessed July 27, 2007).

12. Brenda Hough, "2.0 Continues to Grow," NEKLS Technology Weblog, March 14, 2007, http://blog.nekls .org/index.php/archives/320 (accessed July 12, 2007).