# Leading the Way: Evolving Knowledge Practices in a Multi-Platform Library Environment

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McGill University Libraries

McGill Libraries Bibliothèques

# Establishing a Knowledge Management Strategy for McGill Libraries

- Problem
  - Knowledge spread across multiple systems and platforms
  - Limited visibility into staff documentation and information-sharing practices
  - Inconsistent workflows and knowledge and document management processes
- Opportunity
  - Develop a strategy to improve access, collaboration, efficiency, and knowledge retention across McGill Libraries



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# What are we going to talk about?

- Importance of good document and knowledge management
- Establishing a knowledge management strategy for McGill Libraries – how we did it
- Implementing the strategy



# Knowledge management



- Knowledge creation, storage, and sharing
- Knowledge as organizational asset
- Enabled by technology, but a product of human processes
- Best if embedded in all organizational processes
- Never done!

# Why is knowledge management valuable?



- Supports better decision making
- Supports organizational efficiency
- Supports preservation of organizational knowledge
- Supports employee empowerment and growth

# What capacities support good knowledge management?

- Employees understand the purpose of different file creation, collaboration, and storage tools
- Employees understand how to name, place, organize, and share files to ensure findability



# What capacities support good knowledge management?



- Employees know how to establish and collaborate on authoritative versions
- Employees understand the responsibilities of file ownership

# Establishing a Knowledge Management Strategy for McGill Libraries

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# Objectives

- Ensure effective management of organizational knowledge
- Enable effective communication within the Libraries and information sharing within and across units, by differentiating between knowledge bases, communication platforms, collaboration platforms, and document storage platforms
- Recommend a strategy to maintain the KM strategy post-project



# Project team

- Project Sponsor
- Project Lead
- Project Advisory & Working Group
- Coordinator, Library Technology & Web Services
- Communications Office



# Scope of the project

- In scope
  - Review knowledge-sharing tools and platforms
  - Library-wide consultation
  - Operational and committee documentation only
  - Assess practices using existing access permissions



- Out of scope
  - Records management policy development
  - Cleanup or large-scale content reorganization by Project Lead
  - Procurement of new knowledge-sharing tools
  - Prescribing documentation requirements
  - Internal communications and non-library work
  - Full implementation beyond training and awareness

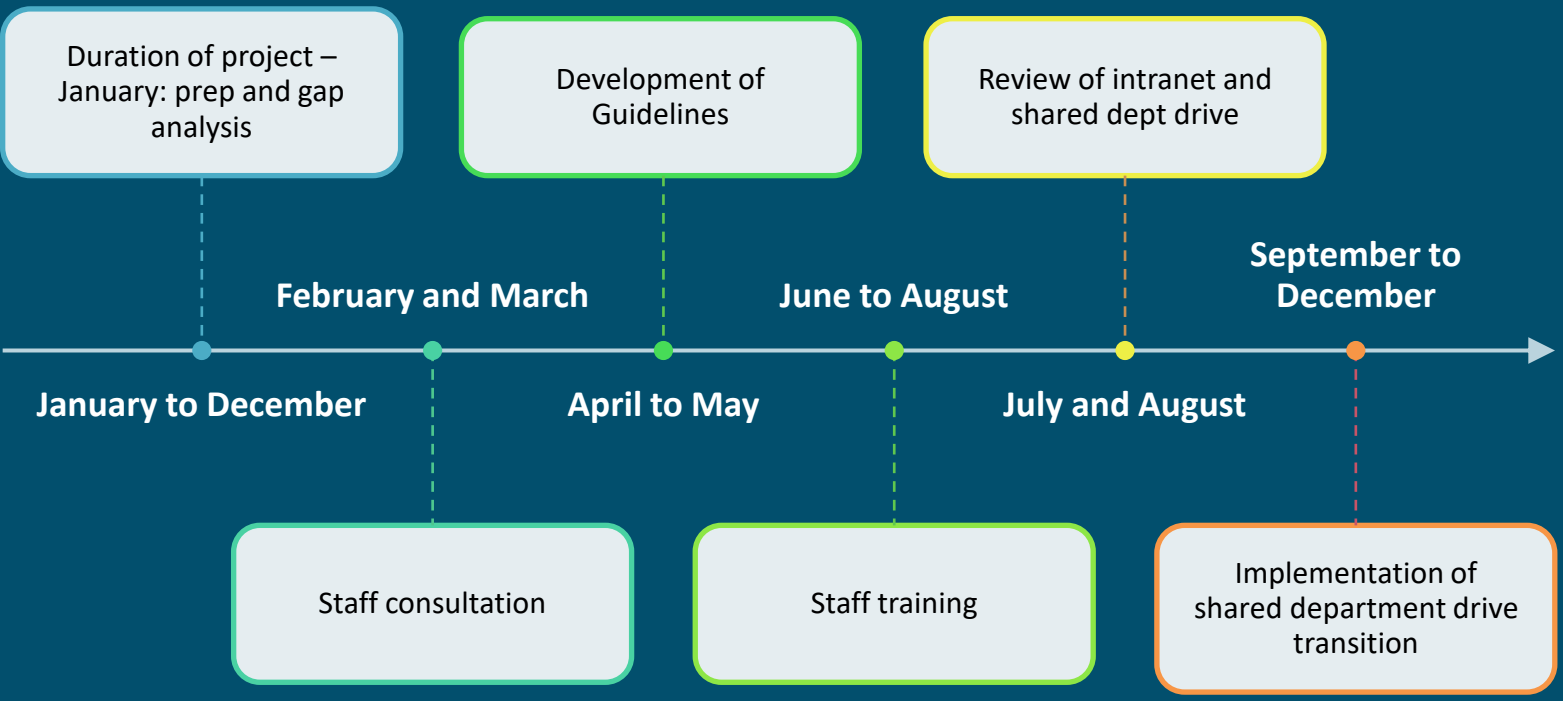
# Key deliverables

- Assess current knowledge and document management practices
  - Analyze the tools we use and how we use them
  - Consult with all staff about their current practices



- Develop guidelines for the selection and use of knowledge and document management tools along with a post-project maintenance recommendation
- Build staff capacity with training sessions
- Support transition from a shared department drive to SharePoint, Teams, and OneDrive

# Timeline

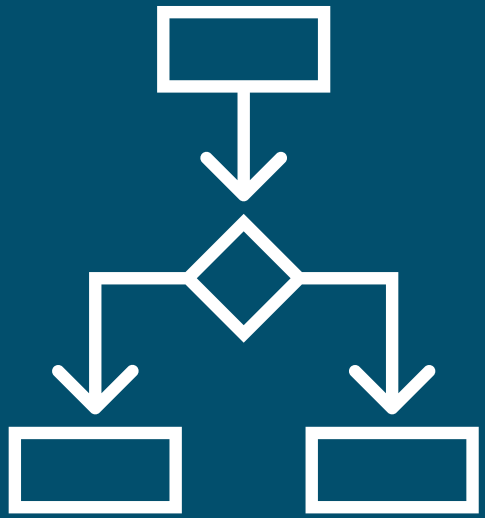

Duration of project – January: prep and gap analysis
Development of Guidelines
Review of intranet and shared dept drive
September to December
February and March
June to August
January to December
April to May
July and August
Staff consultation
Staff training
Implementation of shared department drive transition

# Guidelines for Staff Knowledge and Document Management

- Overview
  - Purpose and scope
  - Platform purpose
  - Placing and organizing files for shared work
  - Ownership, access, and stewardship
  - Version control and collaborative work practices
  - Work completion and transition
  - Appendix: Document types and retention obligations



# Purpose and scope



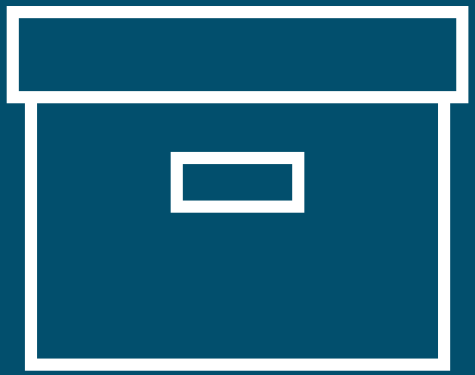
- Support consistent, sustainable decision-making about how documents are created, organized, shared, and maintained
- Establish shared principles for using OneDrive, Teams, the Intranet, and SharePoint
- These are guidelines, not rules
  - there are no document police

# Platform purpose

- This section supports intentional file placement decisions and helps establish shared expectations about ownership, collaboration, and continuity

**Platform summary:**

- OneDrive: a personal workspace
- Teams: a shared workspace
- Intranet: up-to-date, unit-wide and library-wide information
- SharePoint: ongoing access rather than active collaboration



# Placing and organizing files for shared work



- This section focuses on how placement and organization decisions affect findability over time

**Key takeaways:**

- A file must have one authoritative location
- Use descriptive, consistent file names
- Write for future colleagues

# Ownership, access, and stewardship

- This section is focused on who is responsible for shared work, how access is managed, and how content is cared for over time

**Key takeaway:**

- All files, folders, and Teams required for collaborative work, or that need to be consulted by more than one person, should have at least two owners



# Version control and collaborative work practices



- This section explains how to collaborate effectively while ensuring there is always one clear, authoritative version of a document

**Key takeaways**:

- Edit in place and avoid downloading shared files
- Establish an authoritative version for every collaborative document

# Work completion and transition

- This section is about decisions made at transition points, namely, what to keep, where it should live, and who is responsible for it



**Key takeaways**:

- Move finalized materials to appropriate long-term locations
- When a role changes or ends: ensure files are transferred and stored in appropriate shared locations
- When a project or committee ends: assign a steward who will be responsible for the files going forward

# Appendix: document types and retention obligations



- Highlights document types that may be subject to institutional retention requirements
- Meant to support keep or delete decisions
- Formal retention requirements are defined through The McGill University Records Retention Schedule (MURRS) and the MUA Classification Guide and must be followed where applicable

# Where are we today?

- Individual teams and units are implementing the guidelines in different ways
- This is a period of transition away from network drives hosted on a McGill server, to cloud storage (M365)
- The guidelines are designed to help staff make informed decisions about moving files to new storage locations
- Communication is key!

# Questions?

- Thank you! Any questions?

