DEVELOPING AN EVIDENCE SYNTHESIS SERVICE

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University of Illinois Chicago
AGENDA

- About me and UIC SR service
- Brief intro to Lippitt-Knoster Model
- Workshop through 5 elements
  - Vision
  - Skills
  - Incentives
  - Resources
  - Action Plan
Liaison to Medicine and Pharmacy (10Y)

Previous experience in laboratory based research data/project management (18Y)

Current exp in SR

R1 with 6 health science colleges & acad. medical center

SR service:
2 tiered
Working group
Ad hoc development

https://researchguides.uic.edu/SystematicReviews

Me

UIC
WHO ARE YOU?

SR experience
Project mgmt. experience
Roles
Types of institution
Solo vs dept
# Set Up for Success

(Lippitt-Knoster*)

## Model for Managing Complex Change

<table>
<thead>
<tr>
<th>Vision</th>
<th>Skills</th>
<th>Incentives</th>
<th>Resources</th>
<th>Action Plan</th>
<th>Outcome</th>
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TODAY: INVENTORY AND MAP

- Vision
- Skills
- Incentives
- Resources

Action Plan
MORE ACCURATELY...
MANAGING EXPECTATIONS

• Goal is to discover
• Cover comprehensively but at high level, not in depth
  – Move fast, don’t overthink
  – Identify areas to deep dive later
• Short, frequent activities
• Talk to your tablemates! Crowdsourced!
  – Be respectful, listen
  – Don’t hog conversation, encourage others to speak
  – No criticism/judgement. Spaghetti on the wall!
  – Personal info is kept confidential
WHAT MIGHT A SUCCESSFUL SR SERVICE LOOK LIKE (FOR YOU)?
WHO ARE THE SERVICE USERS

• Which departments are demand coming from?
• Which units are producing research already?
• What are the appointments? Status?
• Identify Personas
  – Resident/Fellow, 2 years, Family medicine, expected to publish
  – Asst. Professor, Tenure track, Pharmacy practice, demonstrate impact
  – Clinic director, grant writing, wants SR as rationale
  – Nursing student, on someone else’s SR, guideline development
• Select or create persona

• Note where you need to gather data/research
ALIGNMENT

Institution

Library

Hospital/Clinic

Job Description

Accreditation standards

Competency frameworks
• Identify which influences apply

• Note how this service serves the mission or values

• Note where you need more research/data gathering
WHAT SERVICES ARE INVOLVED IN SR WORK?
Using persona as a guide:

- List potential SR service activities and/or deliverables
  - (Google Systematic Review Service tiers for ideas)

- Sort into Advisory vs technical
- Note estimated time to complete

Activity:
10 min
SUCCESS DEFINITION

• What will you use to determine success?
  – Number of papers published
  – Authorship/acknowledgements
  – Number of consults provided
  – Service “name recognition”
  – Number of requests made

• How will it be communicated and to whom?
• How do you plan on assessing your services

• Note: who will this be shared with?

Activity: 5 min
WHAT SKILLS ARE REQUIRED TO PERFORM SR?
<table>
<thead>
<tr>
<th>Skill</th>
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</thead>
<tbody>
<tr>
<td>Search Design (which databases)</td>
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<tr>
<td>Excel or SR software knowledge</td>
</tr>
<tr>
<td>Document management</td>
</tr>
<tr>
<td>Database feature expertise (which ones)</td>
</tr>
<tr>
<td>Citation manager expertise (which ones)</td>
</tr>
<tr>
<td>Reporting guideline expertise (which ones)</td>
</tr>
<tr>
<td>Writing experience</td>
</tr>
<tr>
<td>Time management</td>
</tr>
<tr>
<td>Project management</td>
</tr>
<tr>
<td>Communication skills</td>
</tr>
<tr>
<td>Scholarly communication knowledge</td>
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<tr>
<td>Protocol registration/knowledge</td>
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<tr>
<td>Understanding review types/SR design</td>
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</table>
• Potential skills that needed to fill service vision

• For skills you have, indicate skill level
  • Beginner
  • Intermediate
  • Expert

Activity:
5 min
DEVELOPMENT AND PARTNERSHIP

Can you offer training?

Formal

Self-directed

None

Within unit

Within library

External

Who are your partners?
For the skills you don’t have:

• Indicate if you can develop or partner to get it

• Indicate
  • How you can train
  
or
  • Who you can partner with

Activity:
10 min
WHAT INCENTIVES ARE NEEDED/DESIRED?
DETERMINE INCENTIVES

- Promotion
- Recognition
- Bonus/pay
- Agency
- Independence
- Awards
- Collaboration

- Recognition
- Satisfaction
- Personal development
- Mastery
- Purpose
- Enjoyment
- Challenge

External

Internal
Activity Directions

Activity: 10 min

Brainstorm as a group

- Possible external incentives
  - What can I do to get them

- Possible internal incentives
  - Why could this matter to me?
WHAT RESOURCES ARE NEEDED FOR SR SERVICE

Resources

Created by Ahmad Roaayala in Noun Project
# DETERMINE RESOURCES

<table>
<thead>
<tr>
<th>Resource</th>
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<tbody>
<tr>
<td>Personnel</td>
</tr>
<tr>
<td>Expertise of others</td>
</tr>
<tr>
<td>Time</td>
</tr>
<tr>
<td>Money</td>
</tr>
<tr>
<td>Stakeholder support</td>
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<tr>
<td>User support</td>
</tr>
<tr>
<td>Web Design/Libguide</td>
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<tr>
<td>SR resources (books, training materials, other)</td>
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<tr>
<td>Authorship/writing resources</td>
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<tr>
<td>Software</td>
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<tr>
<td>Storage</td>
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</table>
Brainstorm as a group

- What resources are required
  - Note have vs need

- For needed resources
  - What is next step to get

Activity:
10 min
This is where we want to be.

Consider using project management software/tools:
• Gantt Charts in Excel
• Kanban boards
• Microsoft Project or Planner
• Monday.com, Asana.com
NOTE ON DECISION MAKING

• Is the decision easily reversible? Low risk?
  – Need maybe 50-75% info to decide and move on

• Is the decision *not* easily reversible? High Risk?
  – Need maybe 75% or more to decide, but don’t push to 100.

https://www.inc.com/jim-schleckser/75-of-the-information-is-all-you-need-to-make-a-decision.html
EASY WIN TO START

• What short term service task/goal can be offered now with the current skills, resources, incentives.
• Describe it
  – What is the service task/piece
  – Who needs to do it
  – What are the resources, skills and incentives already in place.
  – How much time to launch?

Activity: 5 min
CREATE A ROADMAP

• Task list/tracker
  – What is the task
  – What is its category
  – Who needs to do it
  – What are the dependencies
    • What is needed (resource or task) before it can start
  – When is the deadline

• Agency
  – What can I do?
  – What is out of my control? (Revise tasks to those under your control.)
• Pick a task (or a few) from today’s work
• Describe
  – What is the task
  – What category it’s from
  – Who needs to do it
  – What are the dependencies
    • What is needed (resource or task) before it can start
  – When is the deadline

Activity:
5 min
OTHER CONSIDERATIONS

• Marketing and communication strategy
  – Who is your audience
  – What do you want to say (who, what, where, when, why)
  – How will you communicate
  – When will you communicate

• Sustainability
  – Timeline for service implementation evaluation

https://www.yourthoughtpartner.com/blog/internal-communications-plan
Marketing & communication

- Who
- What
- When
- How

Activity:
5 min
WE MADE IT!

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Next Steps

- List incomplete data gathering
- Compile task list
- Organize tasks into timeline
- Set accountability markers
• Vision, Skills, Incentive, Resources and a plan are needed for a sustainable SR service

• Use information collected to map an action plan

• Implement in stages using map as a living document