

School of Information – Spotlight Process

SI 501, Contextual Inquiry and Project
Management | Project Report

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Executive Summary

The University of Michigan's School of Information Media Services department is in charge of all media relations and public relations for the School of Information (SI). This department maintains the School of Information's website, among many other responsibilities, and is responsible for posting fresh content, including a collection of profiles called "Spotlights", which highlight key alumni, donors, faculty, and other members of the SI community. Multiple departments identify profile subjects, and the work of collecting profile information, writing profiles, and posting them on the website is performed by multiple people in three different departments: Media Services, Development & Alumni Relations, and Student Affairs. The launching of a new website last summer provided our group with the opportunity to look into the Spotlight profile creation process and identify areas where the process could be improved upon, using contextual inquiry and analysis.

To this end, we interviewed seven individuals connected with the Spotlight process in some way. These interview subjects came from all three departments that are involved in the Spotlight profile creation process, and had varying levels of personal involvement with Spotlight profile creation. Interviews were followed by group interpretation sessions dedicated to identifying the key insights, ideas, and breakdowns that were brought to light during the course of each interview. These analysis sessions allowed us to create "affinity notes", as well as various models of the work flow, that we later used to identify overarching issues and to brainstorm recommendations for improving the process. We were able to identify four major findings through our inquiry process:

Finding 1: There is no central repository for information concerning the process

The existing materials concerning the spotlight process, including instructional handbook pages, tracking documents, profile survey information, and profile subject photos, can take an unnecessary amount of time to track down in their current, scattered locations. These resources would be more utilized if they were centralized in a single location in a logical order, accessible by those involved in the process. This would allow easy reference, increase understanding of the process, a more comprehensive record of data regarding the process, and make information collected by all parties more available.

Finding 2: There is a need for standardized forms and tracking methods

While satisfaction with the final profiles has been universally expressed, people participating in the process also seem dissatisfied over the lack of a standard method of collecting information to compose the profiles. The lack of a standard questionnaire or web form means that profile writers sometimes need to do additional research on profile subjects in order to flesh out the profile, using valuable time and resources. The process also suffers from the lack of a single tracking spreadsheet. With many different people involved in creating a single profile, a method for tracking each profile's progress would alleviate the need for case-by-case check-ins, decrease uncertainty as to who is performing each step and how far the profile has progressed, and improve flow between departments. We recommend that SI create a single folder on their shared drive containing all pertinent information, including a single shared spreadsheet to be used to track profiles through each step of the process.

Finding 3: People are dissatisfied with using JIRA for collaboration on this process.

The profile process in its current form requires profile questionnaire answers to be uploaded as a PDF to a newly opened JIRA ticket. This step has resulted in multiple issues:



communication of text information requires an extra set for PDF conversion, departments were forced to share photos via a folder on a shared drive outside of the ticketing system (this problem has been resolved), notifications for Media Services regarding the ticket are indistinguishable from unrelated or irrelevant JIRA messages, and the system's interface is so overcomplicated that faculty members prefer to conduct transactions via email whenever possible. Because JIRA's role in this process is simply to transfer spotlight questionnaire results, replacing the system with any other method of text and photo information handoff or communication, such as email or a shared filing system, along with a policy or automatic system for activity notification, would solve most of the JIRA-related complaints.

Finding 4: The process is in need of set time lines and points at which stakeholders are notified of progress

The process of creating Spotlight profiles is so new at this point that a natural timeline has not had time to work itself out. Since the creation of Spotlight profiles for the website needs to be ongoing in order to keep content fresh, putting together a concrete timeline to use as a guide for setting deadlines when creating new profiles would give targets for each step of the process, something that will help reduce confusion and aid work flow between departments. A standard timeline would also create logical points at which notifications should be sent to the other stakeholders. Standardizing these notifications points would allow the people responsible for updating other members of the process to set reminders for themselves, increasing the probability that notifications would be sent and received.



Background

The UM School of Information is a University of Michigan graduate program dedicated to information science research and the education of information professionals. This academic institute offers a full course list for both master's and doctoral students, in addition to providing resources meant to aid students in securing a job. In the administrative departments, staff members work to assist students with degrees, internships, and employment, to promote the school and recruit applicants, and to maintain alumni and donor relations.

In the summer of 2011, the School of Information (SI) launched a new website. While the new site includes most of the data available through the previous version, a collection of profiles of students, alumni, faculty, and donors was not transferred due to the collection's age and lack of maintenance over time. A process was developed and used to generate a new collection of profiles, called Spotlights, in time for the launch of the new site, but it remains an unfinished system with much room for development.

The Spotlight process begins with a meeting of interested departments' content managers. These staff members compare lists of potential profile subjects in order to prevent repeated Spotlight information requests, which could strain the subject's relationship with the school. Once all duplicates have been resolved, each department begins to request information from those stakeholders on their lists.

Most interactions between staff members and profile subjects are conducted via email. Subjects are usually asked to fill a questionnaire (authored by department members) out and to provide an appropriate photo for the Spotlight. Completed questionnaires are uploaded to new tickets on the school's administrative ticketing system, JIRA, but photos required the use of a separate folder on a shared server. Media Services then retrieves these components, creates the profile, and posts the final product to the website.

Our project called for analysis of the Spotlight process' flow and information tracking methods. We found that, while a set of Spotlights has been successfully created, each staff member involved in the process came across issues which they did not have the power to rectify. Some staff members found material related to the process to be difficult to locate, some found themselves waiting on responses from other stakeholders for an excessive amount of time, and some were frustrated by the complexity of JIRA. Our findings in this report address these issues in collaboration between Media Services and profile subject contacts, communication among all stakeholders including profile subjects, and organization of Spotlight process materials. Along with our four major findings, we present our recommendations, both short and long-term, which can be implemented to whatever degree the SI staff is most comfortable with. Each recommendation should be able to stand alone, and each would serve to improve the involved SI staff members' experience with the Spotlight process in a meaningful way.



Methodology

Data Collection

Our formal introduction to the School of Information's Media Services department came through an initial meeting with the Director of Media Services. This gave all members of our team a chance to sit down with the client and learn more about the department's internal workings, as well as learn more about the Spotlight profile creation process. This initial meeting also provided us with useful information for refining our interview protocols, and insight into how each department performed its role in the process. The interview also led us to include two additional interview subjects in our inquiry, in order to capture data from everyone involved in the process.

Following our initial meeting with the client, we conducted seven interviews with the stakeholders in the Spotlight process, a group that included members of the Media Services, Development & Alumni Relations, and Student Affairs departments. In these interviews, we asked a series of questions about the interview subject's role in the Spotlight profile creation process, what technology and tools they used while performing their role, and solicited their feedback about which parts of the process worked well, and where they felt the most improvement was needed. The interviews we conducted allowed us to get a comprehensive view of where breakdowns were occurring, and how communication between those involved in the process could be improved. We also used these interviews as an opportunity to collect artifacts from the process, including spreadsheets, guidelines, and emails.

Data Analysis

After each interview, we convened as a group to review the interview notes, highlight key issues the interview brought to light or provided further details on, and distill all this information into "affinity notes", documenting key steps in the process, issues, quotes, breakdowns, and ideas from each interview. We also used these opportunities to construct models of the data we had collected, which we used to gain a clearer understanding of the Spotlight profile creation process from the point of view of each interview subject.

Once models and affinity notes had been constructed, we spent several sessions diagramming the notes, assembling them into logical groupings and then articulating the higher-level information about the process, such as key issues and design ideas, that each group of notes described. We also consolidated the individual models we had created, in order to form a clearer picture of the process as a whole. The affinity note diagram and the consolidated models together provided us with several insights into where communication was breaking down, and into key issues that were preventing the process from flowing smoothly.



Key findings and Recommendations

Finding 1: There is no central repository for information concerning the process

Evidence

During our interviews, we found that, when asked to print out artifacts for our investigation, our interview subjects would often take an extended amount of time to locate the material. Not only are many different resources scattered among multiple shared file spaces and inboxes, but the filepaths are apparently unintuitive. Communications with profile subjects had to be searched for in an email account, and we watched many of our interview subjects click through several folders in search of a spreadsheet or PDF.

With resources stored in so many locations and without a list or guide to find them, it seems that department members felt discouraged from using the materials intended to define and track the process. We learned that there are a few pages in the Media Services handbook (“Website Manual for Content Managers & Website Processes/Procedures”) dedicated to the Spotlight process, but finding these pages required our interview subject to check one or two locations before finding and downloading the PDF. Even after opening the file, picking the page and a half that is relevant to our investigation out of the sixty-page document made it clear why we had only heard about the resource in two of our interviews.

Short-Term Recommendations

The most basic solution to a scattered collection of electronic resources is to gather them into a single location easily accessible by all staff members involved in the process. This folder would include any tracking documents, including the current spreadsheet created by Media Services, the relevant pages from the handbook, and all profile information, including release forms, photos, questionnaire/survey replies, and relevant information obtained outside of the standardized Spotlight process methods. With only one place to look for Spotlight process material, looking up information or updating tracking documents would be simplified.

While many files involved in the process are subject to updates, informational documents, such as the handbook, should be ensured against movement or alteration. With the process clearly defined and in a reliable location, the many players in the Spotlight creation process will have an easier time keeping the process running smoothly.

Long-Term Recommendations

Once a central repository is in place, it can be improved simply by establishing logical, consistent naming conventions for its files and folders. As long as these conventions are followed, information can be stored and retrieved quickly and efficiently.

Once all Spotlight material is well organized and maintained, it can be made more widely accessible by creating a front-end interface for its contents. The School of Information is



already familiar with the SharePoint platform, but there are many document and content management systems that would work just as well, and perhaps even a few members of SI who would be willing to construct a custom interface for the school. This would allow smoother access and management of the profiles, and actions such as updating information on profiles in progress or publishing completed profiles could trigger notifications to be sent to relevant stakeholders automatically.

Finding 2: There is a need for standardized forms and tracking methods

Evidence

While satisfaction with the final profiles that are posted on the website has been universally expressed, users have also lamented the lack of a standard method of collecting information to collect the profiles. Members of multiple departments pointed to this as an issue in the process, citing the lack of a standard questionnaire for collecting profile information, including photos, as creating additional work for profile writers, who are sometimes forced to do additional research or contact the profile subject again in order to gather enough information to fill out the standard Media Services Spotlight profile template. This issue arises partially from the fact that both Development & Alumni Relations and Student Affairs profile significantly different subjects, and has different long-term goals for the profiles they generate, but problems also arise as a result of profile subjects submitting improperly formatted photos. When a profile subject submits a photo that does not meet the formatting specifications, it becomes necessary for the person who is initiating the profile process to follow up with them. This is a time-consuming activity and involved multiple emails to resolve the issue in the past. Virtually everyone involved in the Spotlight profile creation process mentioned profile photos as an area where breakdowns in the flow of work frequently occur.

Problems also arise from the lack of a single standard tracking method for profiles that are in process, or have been completed. With many different people involved in creating a single profile, the lack of a single method of tracking each profile's progress leads to uncertainty about how quickly the work is progressing, or when the people involved in the creation of the profile should be moving forward with their next steps. A number of our interview subjects expressed their frustration with the fact that even when shared documents do exist to help track the process they are not being used by everyone involved in the process.

Short-Term Recommendations

To ensure that the people responsible for writing the profiles have the information they need to create profiles based on the format used by Media Services, we recommend the creation of one standard questionnaire to be used by all departments. Since multiple team members from the Development & Alumni Relations and Student Affairs departments have mentioned that they use the information they collect from their profile subjects for a variety of additional purposes, we also recommend that departments be able to add questions based on their end



goals and audiences. A single standard form for gathering information from the Spotlight profile subjects would eliminate the possibility that profile writers would have to spend valuable time following up with profile subjects, and allowing departments to add customized questions would ensure that each department is able to gather the additional information it needs.

In the same vein of standardization, creating a central method for tracking each profile's progress as it moves through the process would alleviate the need for case-by-case check-ins, decrease uncertainty as to who is performing each step and where the profile is in the process, and improve flow between departments. We recommend that Media Services create a single spreadsheet for tracking the profile creation process from start to finish. This spreadsheet would include the person responsible for initially identifying and contacting the profile subject, as well as the status of the profile, and the dates on which key steps have been accomplished. This will improve transparency in the work flow between departments, and eliminate the need for frequent emails checking on where each profile is in the creation process.

Long-Term Recommendations

An ideal solution to the problem of standardization is the creation of a customizable web form. This would ensure that profile writers receive answers to all of their questions, and would still allow departments to add their own questions. This would also simplify communications with potential profile subjects by enabling departments to send a link, rather than a lengthy email containing the questions. Including a field that required a profile subject to attach a photo of a certain file size and resolution would also eliminate the frustrations arising from having to follow up with profile subjects multiple times before receiving a properly-formatted photograph.

Finding 3: People are dissatisfied with using JIRA for collaboration on the process

Evidence

It has been noted in most of our earlier interviews with department members that passing completed questionnaire data on to Media Services required saving the text into a PDF, opening a new ticket in JIRA, uploading the PDF to JIRA, and then, often, not hearing anything about the profile's completion or publication. On the opposite end, Media Services would then have to download the PDF from JIRA in order to use it, and any subsequent information additions or updates created an even larger number of excessive steps in profile collaboration, not to mention the extra step of sharing photos via a shared folder due to complications with JIRA. In our last few interviews, we learned just how much of a hassle JIRA creates for those using it for Spotlight collaboration, not to mention other SI administrative projects.



The root of the problem is that JIRA is not actually a collaboration tool; it is a ticketing/tracking system originally implemented at SI by the technical department that has made its way into the administrative offices, perhaps simply because it was already in use. While JIRA is a robust system for issue tracking and resolution, it is not a practical tool for the Spotlight process' needs. Our process requires only a solution for sharing profile material between Spotlight subject contact and Spotlight writer/publisher, but JIRA's plentiful features and alerts are overwhelming enough that staff would rather email about a ticket than log in and use the on-ticket commenting feature, and ticket closing has been delayed simply because of the layers that must be sorted through to find the "close ticket" option.

Short-Term Recommendations

As mentioned in our first finding, a central repository would greatly benefit the Spotlight process in multiple ways. With profile information stored in a standardized folder structure, a profile's JIRA ticket would need only a link or file address, eliminating the need for excessive conversion, downloading, and duplication. Each profile would be gathered with its questionnaire answers, any additional information, and relevant images and video files in a single folder, organized by primary contact department. This would reduce the additional steps that arise in the process with JIRA as a collaboration tool and create a unified method of information sharing rather than breaking information into multiple pieces and spreading them across locations.

Long-Term Recommendations

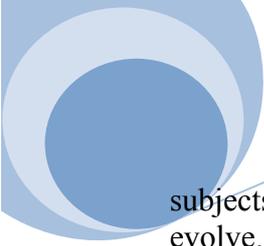
Depending on what customizations JIRA offers, we strongly suggest attempting to simplify the interface used by non-technical SI staff and faculty. Unnecessary features and tabs should be hidden, to reduce the difficulty of finding useful features, and the notification system should be adjusted. A JIRA notification email should make its subject clear, perhaps with a label, and should only be sent to relevant stakeholders, to avoid inbox flooding and risking alert devaluation. The ticket itself could also include a label, declaring which phase its profile is currently waiting: collection, writing, or development.

While we understand that SI administration has come to use JIRA for many projects, the best solution to these JIRA-related complications is to switch to a tool actually designed for the collaborative needs of the Spotlight process. While Media Services has reportedly had trouble using CTools and Google collaboration tools, there are many systems available that are designated as project management tools, such as Basecamp, that would be much more appropriate for not only the Spotlight process, but many other aspects and projects on the SI administrative departments.

Finding 4: The process is in need of set timelines and points at which stakeholders are notified of progress

Evidence

The process of creating Spotlight profiles is extremely new, as many of our interview



subjects emphasized, and a natural timeline for Spotlight profile creation has not had time to evolve. As one person involved in the process told us, “We have only done it once, and we did it in a single batch.” As a result, no concrete timeline for Spotlight profile creation exists, making it difficult to impose deadlines on each part of the process. The lack of deadlines also leads to breakdowns in the flow of work between departments: with no set timeline for finishing one step of the process, the person handling the next step cannot be certain when they will be receiving the profile-in-progress. This uncertainty can lead to friction between departments, and slows down the completion of the work.

The lack of a set timeline for the process also results in a deficiency of logical handoff and notification points for key stakeholders. Several of our interview subjects mentioned the lack of notifications as a source of frustration, and were particularly desirous of receiving notifications when profiles have been written, in order to allow the profile subjects to approve the final profiles for posting, and also when the final version of the profiles have been posted on the website.

Short-Term Recommendations

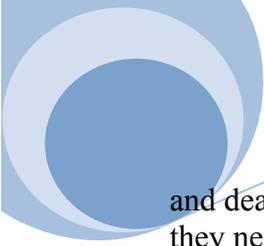
Creating a timeline to serve as a general guide for implementing deadlines in the profile creation process will eliminate uncertainty surrounding when work should be progressing from one step to the next. This timeline would also suggest logical points at which key stakeholders should be notified when a step in the process is complete, and when reminders might need to be sent by the person responsible for the next step. A single timeline to act as a guideline for those involved in the Spotlight profile creation process would also give profile subjects more certainty as to when they could expect to see their profile on the website. Since profile subjects are often key donors and alumni, being able to provide them with an expected date for when their profile will be posted would strengthen the relationship between the School of Information and profile subjects.

In addition to an internal timeline, we also recommend that the person initiating contact with profile subjects ask them to submit their answers for the Spotlight profile questionnaire within a specific time period. This would prevent profile contacts from having to send continual reminders, and would also prevent potential profile subjects from getting lost in the shuffle when more pressing work arises, as a few of the team members we interviewed mentioned can happen. This will also ensure that fresh content is being gathered in a timely fashion, so that the website can continue to be updated with new profiles.

Long-Term Recommendations

Once a timeline for the process has been created, we recommend implementing an automatic notification system for reminding stakeholders when deadlines are approaching, and for alerting other stakeholders when steps have been completed. This would eliminate frustration arising from the current inconsistency in notifications when profiles have been written and posted, and would facilitate work flow between departments. An automatic notification system would also reduce the need for stakeholders in the process to check on profiles in progress, which can sometimes lead to friction between departments or an interruption of work flow.

We also recommend setting target dates for rolling out fresh content. While in an ideal world new profiles would be created on an on-going basis, it simply isn't realistic to assume that departments will have time to continually be developing new Spotlight profiles. Instead, having two or three major “releases” for new profiles would give departments concrete dates



and deadlines, and would also ensure that Media Services is receiving the amount of content they need for the profiles to continue being updated on a regular basis.

Conclusion

The SI administrative staff does an admirable job juggling many tasks among multiple departments in order to help students, keep the school running, and promote the program. But with so much going on all day, every day, a project involving so much collaboration with others who have much to do can be frustrating without a process that takes these factors into consideration. The Spotlight process was developed with an approaching deadline already on the horizon, but we have conducted our investigation carefully and with stakeholders' interests and other commitments in mind. With a centralized and accessible repository for all Spotlight materials, staff could avoid unnecessary hunts for documents and communications, and adding standardized questionnaire forms and tracking documents to this repository would allow profile subject contacts to provide Media Services with adequate profile material and to more easily track the progress of their Spotlights. JIRA can be customized to avoid discouraging attention to its tickets due to its currently overcomplicated interface, though it could also be replaced with a more appropriate content management system. And set time lines and progress notifications would ease the minds of stakeholders waiting on word of profiles passed on for others to complete. With the implementation of our recommendations, we hope the Spotlight process will see an increase in efficiency and a decrease in stress and frustration, an important improvement in the workload of our school's dedicated administrative staff.