

Grace Simons and Cathy Mayer

Deploying Microsoft Teams

Support for onsite, hybrid, and remote staff

The COVID-19 pandemic forced employers to embrace telecommuting. Now, as the pandemic subsides to a degree, employers continue to experiment with hybrid and remote work as a means of sustaining flexibility for employees. Many higher education institutions and academic libraries are in the process of providing guidance for hybrid and remote work by refining telecommuting policies.

According to the Society for Human Resources Management (SHRM), the world's largest professional society dedicated to human resources, telecommuting policies typically include a stated objective, procedures for approval, eligibility, equipment supplied, security expectations, safety expectations, time worked, and any ad hoc arrangements.¹ These elements focus on the place and provisional requirements for remote or hybrid work to be done with the underlying assertion that "arrangements are made on a case-by-case basis, focusing first on the business needs of the organization." Yet high-performing workplace consultant Sue Bingham asserts that organizations "need to start paying more attention to process and, most important, people."² To successfully support hybrid and remote work arrangements, academic libraries should reflect on the tools available for adapting to the needs of employees at distributed work locations.

A variety of applications and platforms, with varying price points, are available to support team communication, collaboration, and organization. When working in an academic library setting, it is important to consider the support of the college or university's IT department before deploying a tool. For provision of sustainable support and data security, institutional IT may designate expectations for using specific resources within a defined platform.

Initial adoption of Microsoft Teams

In March 2020, a statewide stay-at-home order required the North Park University campus community, located in Chicago, to embrace the institution's license for Microsoft Teams. The platform was used to provide remote learning and conduct campus business. Brandel Library staff were largely unfamiliar with Teams, primarily relying on email and face-to-face communication for day-to-day operations before the pandemic. However, the staff was accustomed to sharing some files via Microsoft's OneDrive cloud storage service, though these files were not integrated into Teams.

Grace Simons is electronic resources and cataloging librarian at North Park University, email: gmnsimons@northpark.edu, and Cathy Mayer is a former visiting instruction librarian at North Park University; email: cbmayer@northpark.edu.

Brandel's initial rapid adoption of Teams focused on the platform's chat function. A newly created "Brandel Staff Chat" fostered conversation for work-related questions and conversation. Additionally, 1:1 chat threads were created by staff as needed to foster rapid collaboration. The group also grew accustomed to using audio and video conference tools within the platform for meetings. Video conferencing also enabled reference librarians to connect with students for virtual reference appointments. The inertia of basic workflows using Teams were sustained upon returning to campus beginning in July 2020 because pandemic precautions kept the staff socially distanced.

Strategic expanded deployment of Microsoft Teams

Brandel's use of Teams expanded in January 2022 when Cathy Mayer joined the group as a visiting instruction librarian. Mayer's use of Teams at a previous institution prompted conversation with the library director and staff about opportunities to more extensively leverage the platform to reimagine workflows and better share information. Grace Simons, electronic resources librarian, partnered with Mayer to explore how Teams could be further integrated into the workflows of the library staff. Shortly after their work began, Simons moved out of state and transitioned to full-time remote employment, amplifying the importance of their task.

Simons and Mayer identified three needs and subsequent goals for expanded deployment of Teams. First, the pandemic dampened camaraderie among library staff who were no longer able to engage in spontaneous interactions. To address this culture change, identifying ways to foster community through the Teams platform became an explicit goal. Staff camaraderie was not the only loss induced by the pandemic. Turnover on the team disrupted access to files and information previously stored on OneDrive storage spaces of individual librarians. Some files were lost or became prohibitively time-consuming to access by remaining Brandel and institutional IT staff. Thus, the second goal was to foster improved access to files and information. Similarly, fostering improved navigation for storing and training new staff onboarded by the library was identified as a final goal for the project.

Professional staff who embraced these goals and implemented workflows outlined in the following sections included five full-time in-person librarians, one remote full-time librarian, and two part-time after-hours librarians. Except for one part-time student employee who fulfills the role of office manager for the library, student workers were not enfolded into the Brandel Library Teams platform.

Community

As previously noted, Brandel staff began using chat at the start of the pandemic with the goal of facilitating work questions and casual conversations. With the addition of a designated Brandel Team, the original chat thread transitioned to focus solely on social interaction. To convey the purpose of the chat space, staff discussed updating the name to Brandel Social or Brandel Water Cooler. Ultimately, the group settled on Brandel Fika, which is a nod to North Park University's Swedish heritage and practice of observing *fika*, a custom of taking a break to enjoy coffee with friends.

One unexpected benefit of the Brandel Fika chat thread how it has facilitated community-building among the entire staff. Previously, after-hours staff lacked opportunities to see and

interact with colleagues who worked daytime shifts. Now evening librarians and daytime librarians can engage in time-delayed conversations, building stronger familiarity among the entire team regardless of scheduled work hours.

Navigation

To set up the platform, Simons and Mayer conferred with North Park's IT department to link the Brandel Library group in OneDrive to a team that automatically included the same files, members, and privacy settings. OneDrive files were initially linked to the team and accessible on the platform via a channel labeled General. Additional channels were created for administration, collections, electronic resources, instruction, professional development, public services, and reference (figure 1). These channel names corresponded with existing OneDrive folders, automatically linking the files to the channel. This access point enhances navigation to the files and connects them to a space for focused conversation and discussion within the channel's chat feature.

To avoid creating an overwhelming number of channels, we opted to frame our channel needs in three distinct categories: time-limited work, functional areas, and focused information. Time-limited work channels have not yet been deployed but are anticipated for short-term projects and management of information related to open positions. Functional areas provide space for files and dialog members among specific departments, including Administration, Collections, Instruction, and Public Services. Focused information channels—which include Reference, Electronic Resources, and Professional Development—use the chat feature actively to share questions and issues in need of attention. All professional library staff have enabled channel notifications to draw attention to the focused information chat threads (figure 2).

Teams allows for customization for each channel. There are options to see all notifications, mentions only, or further customization of when a notification will pop up on screen and audibly ping. Regardless of notification preferences, when a chat thread in a channel has new content, it will appear bolded in the list. Channels can also be made private so that the conversations and files are only accessible to specified members. Brandel staff anticipate this feature being most useful for committee work related to candidate searches in reviewing application materials.

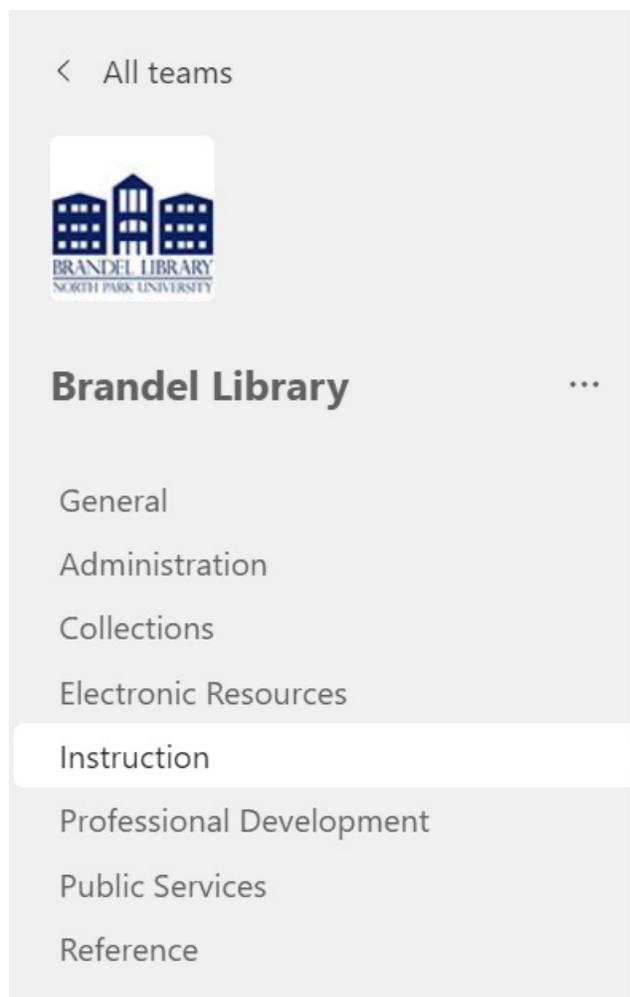


Figure 1. Channels in Brandel Library's Microsoft Teams platform.

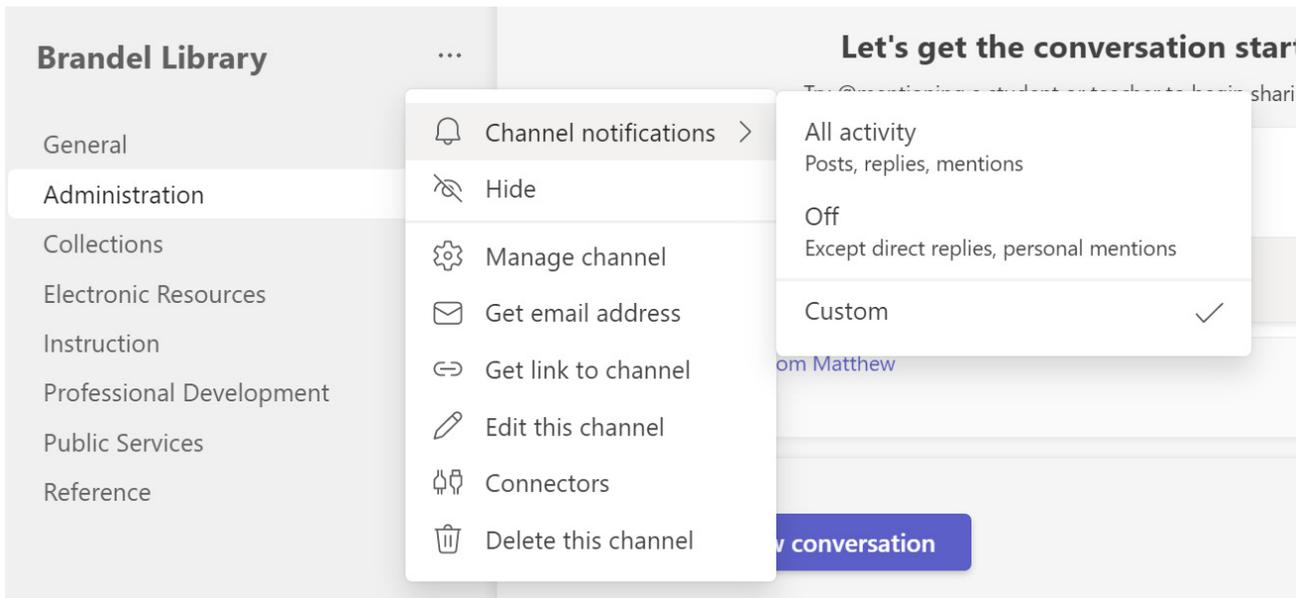


Figure 2. Channel notifications options.

A navigation bar at the top of each channel provides access to useful features, including Posts, Files, and a “+” symbol (figure 3). The Brandel staff uses Posts as a chat thread and space to log ideas or issues connected to that area of work. Content in Posts is searchable or can be browsed via scrolling, making it a useful place for notating filing decisions. The Files feature links to the corresponding OneDrive folder, so all the files can be accessed from within Teams. The files are automatically shared with all members of the channel. Finally, the “+” in the navigation bar allows users to add additional apps, available from Microsoft and external parties, to the channel.



Figure 3. Electronic Resources channel navigation bar.

Many library staff members are also part of other teams within the broader institution. Users can view and access their full list of teams via the left navigation bar by clicking on the Teams icon (figure 4).

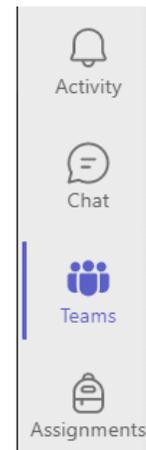


Figure 4. Left navigation bar snapshot.

Onboarding

Libraries often underestimate the value of institutional knowledge and shared documentation for sustaining services, especially when staffing is lean due to turnover or unexpected absences caused by illness or emergencies. For Brandel Library, deploying Teams has centralized files and provided space for recording conversations and decisions that can be referenced by current and future staff. The process of adopting the tool has also prompted us to think critically about our document organization and archiving strategies. With Teams linking to OneDrive, we are in the process of evaluating naming conventions as well as sorting and eliminating unnecessary files to streamline navigation for ourselves and future staff members.

Recommendations

Communicating expectations for use of features within Teams is a key responsibility of library administrators. Specifically, leaders should explicitly identify how they want to see staff use the platform and model expected behaviors. For example, some Teams users intuitively use the status message feature while others remain unaware of how and why the circle on their profile name or photo in the upper right corner of the platform changes colors (figure 5). If administrators want to use the status feature to gauge availability for conversations with staff, they must explain the function and how the team should expect to interact with it.

For groups that want to explore expanded use of Teams—whether a full library staff or a department—it is important to recognize that the platform is not a one-size-fits-all solution. After proposing a high-level structure, engaging staff in iterative feedback is vital for the effective reimagination and adoption of sustainable workflows. Without opportunity to test and refine the platform, users are more likely to replicate existing idiosyncrasies and bad practices instead of creatively envisioning improved ways of working. 🚫

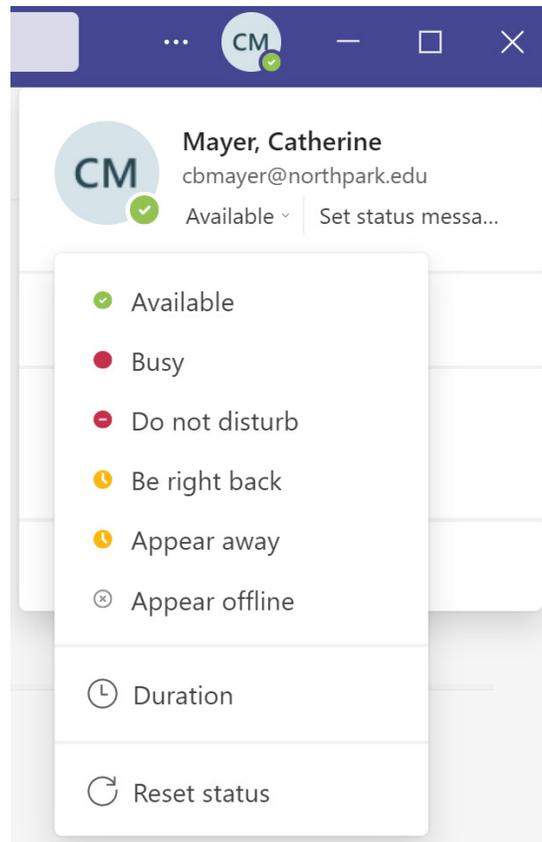


Figure 5. Teams status message options.

Notes

1. Society for Human Resources Management, “Telecommuting Policy and Procedure,” August 19, 2021, https://www.shrm.org/resourcesandtools/tools-and-samples/policies/pages/telecommuting_policy.aspx.
2. Sue Bingham, “To Make Hybrid Work, Solicit Employees’ Input,” *Harvard Business Review*, July 29, 2021, <https://hbr.org/2021/07/to-make-hybrid-work-solicit-employees-input>.