**NoWAL Critical Friend Pilot Review**

**Background**

The previous NoWAL Plan identified Critical Friend as an approach that NoWAL libraries could find useful when reviewing or developing their services. A pilot was established to explore the Digital Presence and Service Delivery at University of Cumbria with Angela Walker from University of Salford as the Critical Friend. Angela undertook a desktop review of the library webpages and a day visit with a brief to look at what was currently available and to identify good practice and areas where changes could be introduced. Angela produced a written report in which she identified 5 key areas, she reported on Good Practice and Further Developments for each of these areas and a set of Further Recommendations were provided at the end of the report. The report was provided to Margaret Weaver, Head of Library and Student Services at Cumbria.

The following review is based on feedback provided by Angela, Margaret and colleagues from Cumbria who met with Angela on the visit.

**Setting up the Pilot**

Once the pilot project had been established Cumbria completed the Critical Friend request form and this was circulated to NoWAL Directors to ask for expressions of interest. This initial proposal was to review quite a substantial area so it was originally hoped that we could recruit 2 Critical Friends to work on the project together. Unfortunately, only Angela had the necessary expertise, time and was available at the time the project was running. This did lead to the remit having to be revisited and it became more focussed on the library web pages. Some members advised that they did not have staff with the skills set that would be required for the pilot. Several Directors fed back that they did have staff with the expertise but either the time requirement of the project or the timing of the pilot and workloads at their institutions meant that they did not have the capacity to contribute to the pilot.

*3 potential barriers to being able to meet the requirements of a critical friend request that could be encountered in the future were identified:
1. No staff within NoWAL with the skill set required to act as a Critical Friend
2. Timing of the project clashing with requirements at home institution
3. The time requirement for the project too great. It may be possible to deal with this is there was more than one Critical Friend available and the nature of the project allowed it to be undertaken by more than one person.*

**Feedback from the Critical Friend**

Angela described her role as providing a fresh perspective for the team at Cumbria by looking at a distance at their web pages and being able to see opportunities that they could explore and develop. She found communication with the Head of Service key as this clarified the brief and expectations from the review.

Angela identified some helpful advice on ways in which the process and form could be enhanced:

* A clearly defined brief of the project and what it would involve
* The opportunity for a potential Critical Friend to have a no commitment conversation with the Director to ensure they had the opportunity to explore and question what was required to help them to decide if they have right skills to undertake the review and to prepare how they would approach the project to achieve these aims
* The form would benefit from a section in which the Director is able to provide the context for the project, why they want the review to take place and details about timescale including any deadlines
* Any potential issues should be identified in advance so solutions can be put in place. For example
* Top Tips provided for Directors and Critical Friends

On a personal level Angela found that this was a rewarding experience and that sharing experience with Cumbria enabled her to reflect on her own and her institution’s practice and was to identify some good practice from Cumbria to explore. She also felt that she developed her report writing and organisational/structuring skills.

**Feedback from the Director**

The Critical Friend pilot at Cumbria supported the team in reviewing capacity for develop their digital presence which was an aim in the service’s Business Plan.

**Key points of feedback were:**

* Institutions being already known to each other through NoWAL helped establish rapport especially with the short timescale
* Objectivity and distance of Critical Friend
* Template form helped to define brief with supplementary information and access to materials provided once Critical Friend was identified
* Ensure your own team are prepared and agree with this approach. The NoWAL badge helped with this
* Adjustments may need to be made, for example 2 days for project visit amended to 1 day for visit and 1 day to write report. During the visit the lunch was a good opportunity to discuss the project outside the timetabled sessions and for any clarification to be provided
* Initial feedback was provided at end of visit
* Report was very helpful with constructive feedback. Use of examples and screenshots and sharing of good practice enhanced the recommendations
* The Cumbria team have been able to identify several areas for improvement including the working relationship with another section of the University. Actions have been identified and put into place

**Learning Points:**

* Build trust and establish the call to action internally first.
* Be prepared to negotiate on the format of the visit and agreed time for the visit and following this any report writing.
* Agree in advance how the recommendations will be used. In our case, the report has informed the new student hub project.

**Feedback from other staff at Cumbria**

Senior staff at Cumbria were asked for their feedback on their experience of this process. Respondents all felt that their expectations had been met. One response said, “we now have a useful report that points out key areas of development. In many ways, the report confirms the areas we need to do more work on and I hope that verification by an external contributor will add weight to internal discussions. It is also pleasing to see recognition for all the good practice that already takes place.” It was felt the written report was a useful format and again the use of screenshots was praised. There was a suggestion that there should be an opportunity to seek qualification of any points that were unclear. All respondents found this a useful format and would consider using it again; one of the key benefits identified was “to gain the insight of someone working in the same field and doing the same things we do but perhaps differently or for longer.”

**Actions and Improvements to Documentation and Processes**

Form updated

Produce a Flow chart/process map

Top tips for Critical Friend & Director (these should be ‘live’ documents so they can be added to as further projects undertaken in other contexts e.g. .space, staffing etc.)

**Recommendation**

The Board endorses Critical Friend Reviews as a mechanism facilitated by NoWAL to support its member libraries.