

Delphi technique: the methods behind the Horizon Report

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Abstract

At the EAHIL Workshop in Edinburgh Guus van den Brekel and Rudolf Mumenthaler have presented the Delphi method, which is used for the Horizon Report (<http://www.nmc.org/nmc-horizon/>). The workshop session was titled *Delphi technique: The methods behind the Horizon Report Library Edition* and was held on Thursday the 11th of June. The authors of this report, as session leaders, ran through a smaller version of a Delphi process, although they actually had little time, the result was nevertheless very interesting.

Key words: libraries; trend analysis; Delphi method.

The course of the workshop – the mini-Delphi study

First, I have to admit that the workshop session was really fun. The workshop variant of a Delphi study is also called mini-Delphi. If you want to carry it out seriously, more time is needed. I think with about 2 hours you can play through each stage correctly, 3 hours would be more appropriate. We proceeded as follows: first, we introduced the method, as used in the Horizon Report. Then we carried out the various stages with about 25 participants (*Figure 1*).



Figure 1. Participants at the workshop session on the Delphi technique

We wanted to answer the following questions: what are the most important trends and challenges for medical libraries? So our aim was a kind of a Horizon Report Medical Libraries Edition, created by the attending experts. And this was the course of the workshop:

- short presentation of the topics of the Horizon Report Library Edition;
- statements on relevant issues by the participants (short presentation);
- detecting the issues on flipchart;
- first round voting and selection: each participant had three coloured dots to stick on to his favourite subjects on the flipchart;
- the seven themes with the most points (more than two) were written on a card and each assigned a table;
- the topics were discussed in groups at the tables (ideal here would be a World-café where you have about 60 minutes to discuss each 15 or 20 minutes at a table. The results are displayed on cards/flipchart/tablecloths);
- brief summary of the discussions in plenary;
- second vote: each participant receives two points, which he can stick on the flipchart with the topics discussed;
- and the winner is

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The result of the workshop

In our workshop the new topics have already been discussed lively, the list included quickly 10 issues. Surprisingly then one of the new themes – Strategic Thinking – managed to get the second place in the first round voting. Several proposals could be subsumed under an existing topic. This process (summarizing related topics, separating different aspects) is an important task of the editors also for the “real” Horizon Report. This represents a certain procedure which is important for subsequent review – though not all experts may be in complete agreement with the editorial reworking. In our workshop topics were mentioned several times that we subsumed under the title “Rethinking Roles and skills of librarians”. This subject got in the first round and most votes.

Subsequently, the issues were discussed in groups, especially lively, the two already mentioned: “strategic thinking” and “new roles for librarians”. An intended effect of the Delphi method is that the opinions of the experts can change and consolidate during these discussions. And this effect occurred indeed: the group that dealt with strategic thinking argued convincingly. A strategic approach is very important for libraries (not only medical). One must be able to convince funding bodies and stakeholders. And this can only be achieved if you have a clear strategy. Strategic thinking means also that you deal with future developments and that the library is prepared for changes (as much as possible).

One must, for example, follow developments in the field of publication systems and research policy in order to possibly point the researchers to new requirements or changes in these areas.

And this was the final result of our mini-Delphi study (Figure 2):

1. Strategic thinking
2. New roles and skills for librarians
3. Collaboration/Interoperability
4. Radical change
5. Accessibility/Visibility
6. Economic situation (as a general challenge)
7. Open science

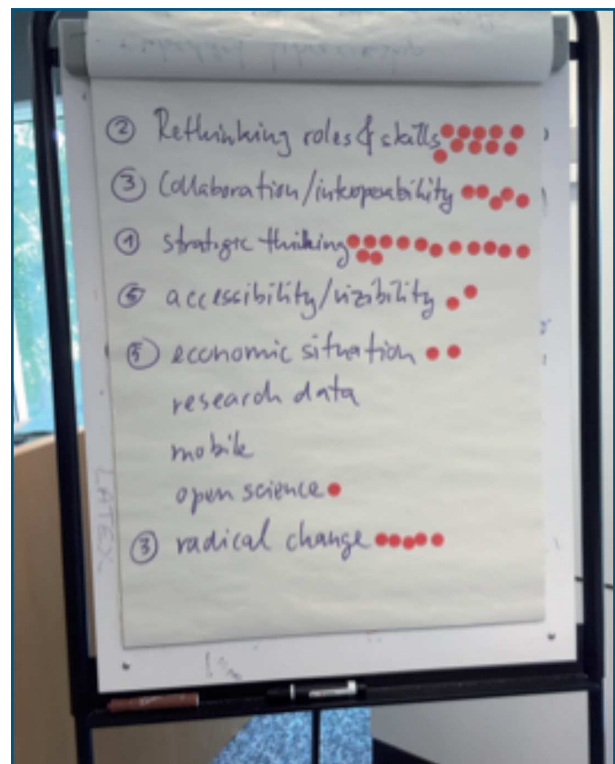


Figure 2. Final results of the mini-Delphi study