

Viewfinder

Case Study

Organizational values inventory

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Project page for Viewfinder:
www.lib.montana.edu/responsible-ai/

Abstract

The Colgate University Libraries leadership team piloted the Viewfinder Exercise as a foundation for building shared organizational values around AI integration and informing the libraries' strategic plan. Working through scenario-based prompts and stakeholder perspectives, participants surfaced core values such as trust, human-centeredness, and service quality, while also confronting difficult questions about institutional statements, role-based assumptions, and where the libraries may need to stand firm as AI reshapes the field. The exercise proved most valuable not as a decision-making instrument but as a generative conversation starter, revealing unspoken assumptions and tensions that rarely surface in routine project planning. Key lessons included the importance of early-stage implementation, non-supervisory facilitation of discussions, and treating Viewfinder's value bank as a living, organization-specific resource rather than a fixed menu.

Project details and background

Colgate University's approach to AI has always been rooted in a philosophy of critical engagement anchored in the core principles that guide the use (and non-use) of AI in the curriculum and the institution. Any engagement with AI must be rooted in our educational mission, reflecting the values of ethical engagement, critical inquiry, and disciplinary depth rather than mere convenience. Also, Colgate University recognizes that the liberal arts are uniquely positioned to respond to this moment because AI is not simply a technical tool but a social, philosophical, environmental, political, and creative phenomenon; understanding its implications requires synthesis, not just technical proficiency. Though guided by these principles, the libraries has never conducted a broad conversation about our individual and collective values related to AI use, adoption, or integration.

The libraries' leadership team identified the Viewfinder exercise as a structured way to facilitate a shared conversation about AI values across the library organization. The exercise walks participants through selecting an AI scenario, identifying their own top three values, then adopting a different stakeholder's perspective and identifying that stakeholder's values, before working through reflection prompts on alignment, bias, accountability, and scope. The core appeal for this group is using that structure to surface where staff values converge and diverge around AI integration, and to build shared vocabulary for a strategic plan.

Viewfinder was seen as a lightweight, generative way to engage staff in values reflection without requiring software or technical expertise. The PDF output — capturing both your own values and a stakeholder's values — could serve as a values inventory across the organization. The ability to write custom scenarios was particularly valued, since it would allow the library to move from generic AI scenarios toward Colgate-specific situations over time. The exercise was also seen as useful beyond AI specifically, with precedent from the JSTOR migration as a comparable use case.

The main concern was uneven staff engagement: many staff are not yet actively using AI tools, and some have no current AI integration in their workflows. This could make Step 1 (choosing a scenario) difficult. The group recognized that meaningful participation would require participants to think about values at the organizational and university level, not just from a day-to-day vantage point. There was also discussion about whether to complete the exercise with the leadership team first before bringing it to all staff, but the consensus leaned toward doing it together simultaneously, since values are not role-exclusive and the anonymous PDF format makes collective analysis straightforward.

The group settled on a facilitated, in-person model using breakout groups led by department heads both for consistency and trust. We intentionally ensured that department heads facilitated breakout groups with no direct reports. Participants would complete the scenario during the session, with facilitators guiding the process and fielding questions. Results were then collated into a holistic values inventory to share at an all-staff meeting. The ITHAKA AI into Action Initiative, of which the libraries joined in the summer of 2026, was identified as a timely entry point for beginning this work, as it offers a natural opportunity to surface and communicate the library's values and purpose during a workflow re-evaluation.

Viewfinder exercise

In the breakout rooms, library faculty and staff split into small groups and worked to identify the three values that mattered most to that stakeholder group when evaluating a potential library AI chatbot service. In addition, each group chose a different stakeholder and discussed their perceived values. Coming back together for a group discussion, nearly everyone identified trust as a top value, making it

the single most consistent thread across all the stakeholder lenses. Human-centeredness was almost as widespread, with multiple groups insisting that any chatbot preserve real human interaction with students rather than fully automating service points. Service quality and education followed closely and were often discussed together: a wrong answer from the bot was seen as simultaneously bad service and a trust violation, and several groups noted that creating shortcuts in students' research and writing could undermine the library's educational mission. Social responsibility came up repeatedly too, sometimes framed around environmental and bias concerns about AI systems, and sometimes around whether the library was doing students a disservice by smoothing away the productive "friction" of research and writing. Stakeholder-specific themes emerged as well: the university-administrator lens introduced fiscal responsibility, including worry about AI being used to justify staffing cuts; the library faculty lens raised alignment with the field's existing commitment to patron privacy; and a faculty lens flagged accessibility, accountability, and the open question of which department, such as Access Services, would actually own the chatbot's outputs.

The shift to whole-group discussion focused on what made the exercise difficult and what it revealed. Several participants said narrowing a long list of values down to just three per stakeholder was genuinely hard, and that imagining themselves into a student's or administrator's mindset took real effort. Faculty concerns about plagiarism echoed older debates over exam proctoring, suggesting AI is reviving rather than inventing these tensions. People were struck that the step of explicitly naming shared values often gets skipped, and several found it reassuring that human-centeredness emerged as a near-universal priority, even while acknowledging how hard it will be to uphold given competitive pressure from AI tools and the absence of clear institutional policy. Ultimately, the group discussed the importance of deliberately designing friction into research and service workflows so AI doesn't shortcut learning, while also flagging long-term dependency on AI as a risk worth monitoring.

Discussion and outcomes

Key takeaways

Viewfinder prompted our team to think more deliberately about the values underlying AI implementation decisions, rather than jumping straight to technical

or operational questions. By working through scenarios like potential chatbot tools, we found ourselves asking not just "would this work?" but "does this align with what we care about?" The exercise surfaced values like trust, care for knowledge, and human-centeredness as criteria that should shape how AI tools are evaluated and deployed.

Perhaps most significantly, Viewfinder shifted our attention toward stakeholders we might otherwise overlook. Thinking through how university administrators, faculty, and students each conceptualize a given project helped reveal assumptions in our usual departmental workflow perspective. This reframing, considering external perceptions alongside internal ones, gave us a richer picture of what's actually at stake when we introduce AI into library services.

Viewfinder also made visible a tension we often avoid confronting directly: we cannot keep doing everything at once, and resource allocation demands real choices. By naming values explicitly, we gained a more honest framework for discussing what to prioritize, and, critically, what to stop doing, as AI changes what's possible and what's expected of library staff.

One key lesson learned was that selecting values for stakeholders other than yourself is genuinely difficult. Library staff noted feeling like they were making assumptions when imagining a stakeholder's priorities, and that discomfort turned out to be productive because it highlighted how rarely we formally consider other people's perspectives during project planning. The difficulty wasn't a flaw in the exercise; it was the exercise working as intended.

Another lesson was that individual values tended to remain fairly consistent across different scenarios, while values attributed to different stakeholders diverged more significantly. This suggests the tool is particularly effective at revealing interpersonal and inter-role tensions rather than just personal bias. It also points to the value of doing this exercise collaboratively rather than in isolation.

The group also recognized that limiting the exercise to one stakeholder and three values, while useful for a first pass, may be too narrow for real-world implementations. Projects affecting faculty, students, and library staff simultaneously would benefit from expanding the stakeholder pool. The exercise is best understood as a starting point for conversation rather than a complete decision-making framework.

Open questions

Several important questions remain open. The group discussed whether certain values like job security, accessibility, and professional development belong explicitly in Viewfinder's value bank, but no firm decisions were made. Similarly, the question of which scenario to anchor a broader all-staff exercise around was raised but not resolved. These choices will significantly shape how the conversation resonates with staff, and they deserve careful deliberation.

There is also an unresolved question about how to represent university administrator perspectives without reducing real people to caricatures of professional roles. Showing the organizational chart as an educational tool was floated, and listing specific administrator roles was suggested to avoid vagueness, but the line between useful framing and unhelpful stereotyping still needs to be worked out. How we invite staff to think about stakeholders who aren't in the room is a delicate facilitation challenge.

Finally, the broader question of scope remains open: is Viewfinder most useful for AI-specific implementations, or is it applicable to any major project or change initiative? The group suggested it could work for either, but adapting it thoughtfully for different contexts — and knowing when it's the right tool versus when something else is needed — will require more experience using it in practice.

Recommendations

One recommendation we came to consensus on was possibly using Viewfinder early in the project planning process, before positions harden and decisions feel already made. The most valuable function it serves is surfacing assumptions and tension points while there is still room to act on them. Waiting until a project is underway reduces it to a retrospective exercise rather than a generative one. Pairing it with actual documentation goals, as one participant noted, working through the values exercise could directly inform project documentation and stakeholder communication plans.

Facilitating the exercise with someone who doesn't hold direct supervisory authority over participants is crucial. This lowers the stakes enough for honest conversation, particularly around uncomfortable topics like job security and the anxiety of discontinuing certain programs. Consider using small breakout groups that mix roles (pairing library faculty with staff, for example) to break down the

usual silos and generate richer dialogue. A skilled facilitator can help the group move back and forth between abstract values to concrete implications without letting the conversation stay too comfortable.

Finally, treat the value bank as a living resource rather than a fixed list. Your institutional context, mission, strategic framework, and specific community should shape which values are surfaced and how they are defined. Invite participants to add their own values and definitions rather than only selecting from a preset menu. The goal is genuine reflection, and that requires enough flexibility for people to name what actually matters to them in their own words.