Making Change, Increasing Value: Reorganizing Your Access Services Department

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A Quick Poll

• https://pollev.com/timhackman369
Background

Resource Sharing & Access Services

- New department head, October 2012
- Originally 5 units: Circulation & Reserves, Interlibrary Loan, Stacks, Late Night, Billing
- Added 2 units: Information Services, Terrapin Learning Commons
- 24 x 5 service at 2 desks
- 31.5 FTE, 100+ students
- Lots of new staff & services
Reorganization Goals

• General:
  • Improve efficiency of operations
  • Increase staff engagement
  • Improve the user experience

• Specific:
  • Integrate staff and services from TLC and Information Services units
  • Ensure work is shared equitably and efficiently
  • Ensure consistent staffing across two service desks
  • Identify and eliminate redundancies in our work
  • Assess staffing needs and make the most of existing staff
  • Allow and encourage staff to learn new tasks and build skills
Kotter’s Eight Stage Change Process

1. Establish a sense of urgency
2. Create the guiding coalition
3. Develop a vision and strategy
4. Generate short-term wins
5. Empower employees for broad-based action
6. Communicate the change vision
7. Consolidate gains and produce more change
8. Anchor new approaches in the culture

Reorganization Process Timeline

- Guiding Coalition Formed: 10/15/2014
- Kick Off Meeting: 11/12/2014
- Staff Retreat: 1/16/2015
- Card Sorting Exercise: 4/21/2015
- Task Groups report to staff: 7/30/2015
- Reorganization Effective Date: 9/20/2015

Time Log Analysis: 1/19/2015 - 4/3/2015
Org Chart Drafts & Revisions: 4/22/2015 - 6/15/2015
Rewriting Job Descriptions: 6/15/2015 - 8/14/2015
Task Groups: 6/15/2015 - 7/29/2015
Retrieval and Scanning: Before

**ILL**
- Print ILL pull slips
- Pull ILL & DD slips
- Scan for ILL & DD
- Save files to network
- Batch send files
- Print ILL pull slips
- Pull ILL & DD slips
- Scan for ILL & DD
- Save files to network
- Batch send files

**Circulation**
- AM:
  - Print holds list
  - Pull holds list
- PM:
  - Print holds list
  - Pull holds list

**Reserves**
- Print Reserves pull slips
- Pull Reserves pull slips
- Update status, set aside
- Scan for Reserves
- Save files to USB
- Add coversheet
- Perform quality control
- Upload file to ELMS

**Late Night Study**
- Print and pull holds list
- Print and pull ILL slips

**Billing**
- Print and pull as needed to resolve billing inquiries
Retrieval and Scanning: After

Integrated Scanning Workflow
For Interlibrary Loan, Document Delivery, & E-Reserves

1. Print Slips
   - By RSR/LNS Staff
   - From ILLiad & Ares
   - Expedited with Auto Hot Key

2. Pull Items
   - By CMR/LNS Staff
   - By Floor & Shelving Location

3. Scan & Save
   - By RSR Students
   - Specs on slips
   - QC while scanning
   - Save files to RSR (S:) Share

4. Deliver or Upload
   - Deliver with ILLiad’s EDU (auto-mode)
   - Batch Item Upload by RSR staff in Ares

REPEATED 3 TIMES DAILY

Billing
Prints and pulls as needed to resolve billing inquiries

Integrated Retrieval Workflow

12:00-2:00 AM
Print and pull holds list + unmediated RSR slips
Late Night Study

7:30 AM
Begin processing mediated requests
Resource Sharing & Reserves

9:00 AM
Print and pull holds list
Collection Maintenance & Retrieval

10:30 AM
Print RSR slips
Resource Sharing & Reserves

11:00 AM
Pull RSR slips
Collection Maintenance & Retrieval

1:30 PM
Print RSR slips
Resource Sharing & Reserves

2:00 PM
Pull RSR slips (open shelving only)
Collection Maintenance & Retrieval

3:00 PM
Mark loan requests found
Resource Sharing & Reserves
Pack items for UPS Logistics & Periodicals

3:00 PM
Print and pull holds list
Collection Maintenance & Retrieval

4:00 PM
UPS pick up

4:30 PM
Print RSR slips
Resource Sharing & Reserves

5:00 PM
Pull RSR slips (compact shelving only)
Collection Maintenance & Retrieval

7:00 PM
Scanning & Processing Finished
Resource Sharing & Reserves
Shipping and Receiving: Before

**ILL**
- AM: Unpack:
  - USPS mail (ILL)
  - UPS mail (ILL)
  - Blue bin (ILL/PPH)
- PM: Unpack:
  - USPS mail (ILL)
  - FedEx (ILL)
  - Pack:
  - Blue bin (ILL)
  - UPS mail (ILL)

**Periodicals**
- AM:
  - Retrieve newspapers from mail room and physically process
- PM:
  - Retrieve journals from Acquisitions and physically process

**Circulation**
- AM: Pack:
  - Dept. Delivery (PPH)
- ??? Unpack:
  - Gray bins (PPH/ILL)
  - Green bins (PPH/ILL)
  - Red bins (PPH/ILL)
  - UPS mail (PPH)
- Late PM: Pack:
  - Red bins (PPH/ILL)
  - Green bins (PPH/ILL)
  - UPS (PPH)
Shipping and Receiving: After
Desk Scheduling: Before

• No reliable method for backup and shift coverage
• Questions of fairness arose in break room conversation
Desk Scheduling: After

- 3 Tiered backup system
- Equitable distribution of Desk Hours based on Job description
- Shift trade hierarchy
- Unit Supervisors have input for desk schedule
Student Supervision: Before

- Circ & Reserves
  - Hiring
  - Training
  - Pay Scales
  - Scheduling

- Late Night
  - Hiring
  - Training
  - Pay Scales
  - Scheduling

- ILL
  - Hiring
  - Training
  - Pay Scales
  - Scheduling

- Stacks
  - Hiring
  - Training
  - Pay Scales
  - Scheduling

- TLC
  - Hiring
  - Training
  - Pay Scales
  - Scheduling
Student Supervision: After
Assessment

3 General Goals:

• Improve efficiency of operations
• Increase staff engagement
• Improve the user experience
## Assessment – Goal 1

<table>
<thead>
<tr>
<th>Labor &amp; Assistance Requests</th>
<th>FY2016</th>
<th>FY2017</th>
<th>% Change</th>
</tr>
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<tbody>
<tr>
<td>Total Funds Requested</td>
<td>$524,462</td>
<td>$508,414</td>
<td>- 3.06%</td>
</tr>
<tr>
<td>Total Hours Requested</td>
<td>49,932</td>
<td>49,012</td>
<td>- 1.84%</td>
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<tr>
<td>Learning Commons</td>
<td>9,984</td>
<td>10,780</td>
<td>+ 7.97%</td>
</tr>
<tr>
<td>Stacks</td>
<td>7,050</td>
<td>6,240</td>
<td>- 11.49%</td>
</tr>
<tr>
<td>Late Night</td>
<td>6,336</td>
<td>6,840</td>
<td>+ 7.95%</td>
</tr>
<tr>
<td>Interlibrary Loan</td>
<td>9,282</td>
<td>9,408</td>
<td>+ 1.36%</td>
</tr>
<tr>
<td>Library Services Desk</td>
<td>17,280</td>
<td>15,744</td>
<td>- 8.89%</td>
</tr>
</tbody>
</table>
Assessment – Goals 1 - 3

1. I feel that I accomplish more in my workday than I did before the reorganization.

2. I feel that my ideas have more of an impact on the USRS department than they did before the reorganization.

3. I feel that I am helping the USRS department better accomplish its strategic goals than before the reorganization.

4. I feel that library users are generally more satisfied with the services provided by the USRS department than they were before the reorganization.
Assessment – Goals 1 & 3

Course Reserves Fulfillment

- For UMD users (Request to Receipt): 5 hours saved
- For Big Ten (Request to Ship): 12 hours saved
- For RapidILL (Request to Ship): 16 hours saved
- For All Libraries (Request to Ship): 12 hours saved

Average Turnaround Time for Lending & Document Delivery

- For UMD users (Request to Receipt): 12 hours saved
- For Big Ten (Request to Receipt): 5 hours saved
- For All Libraries (Request to Receipt): 16 hours saved

% Filled Within Timeframe

- 0-1 days
- 0-3 days
- 0-7 days
- 0-14 days
Assessment – Goals 1 & 3

Average Turnaround Time for Lending by Month

Turnaround Time in Days

August  September  October  November  December  January  February  March  April  May  June

FY2015  FY2016
Lessons Learned

• Job descriptions matter!
• Involve Human Resources early in the process
• Provide many and varied opportunities for communication/feedback
• It will take longer than you think
• Everything will not go as planned
• Plan to assess from the start
• Use it to your advantage!
Questions?

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