OLAQ

Volume 25 , Number 1 *Future Organization of Things* | Pages 25 - 29

8-14-2019

# From Selection to Shelf: A Process Improvement Experience

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Vik, L. (2019). From Selection to Shelf: A Process Improvement Experience. *OLA Quarterly, 25*(1), 25-29. https://doi.org/10.7710/1093-7374.1972

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*OLA Quarterly* is an official publication of the Oregon Library Association | ISSN 1093-7374

# From Selection to Shelf:
## A Process Improvement Experience

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Lorie Vik is the Access and Technology Librarian Supervisor at Hillsboro Public Library. Her work life is focused on the role technology plays in our lives and how it can create a better library experience. One of her best early career decisions was getting involved in committee leadership at the state level because it connected her to people with great ideas and experiences to share. When she's not on a dance floor, you may find her on the couch watching reality TV dance shows.

**Abstract**

*After Hillsboro Public Library (HPL) used design thinking to build a collaborative service model on the public floor, we wanted to extend it behind the scenes. How could we achieve our goal of getting items from door to floor in under 48 hours? How could we improve the workflow with selection, acquisitions, cataloging, and processing to create a 7-day-a-week operation? The library teamed up with the City's Eureka! Project to use process improvement tools to analyze our systems and workflow. We involved non-library staff on the team to get an outsider's perspective, and we asked the staff doing the work lots and lots of questions. After three days we identified short, medium, and long-term action items to meet our goals and ultimately provide better service to patrons.*

### Service Evolution and the Collaborative Service Model

Several years ago, Hillsboro Public Library (HPL) used design thinking, a human-centered approach to innovation, to change its public service model. We identified two main goals: improve the patron experience and bring more value to staff. That led to our collaborative service model by merging traditional reference and circulation service points and cross-training staff to be able to answer most questions.

We also realized our department names (e.g., public services, technical services, circulation) no longer fully described the work and services we provided because we all provide *public* service. So we changed our department language to reflect the experiences we want patrons to feel (connect, explore, cultivate and innovate) and to solidify the notion that public service extends to all that we do, including essential back-of-the-house operations.

It was now time to reexamine this work from a service evolution and collaborative service model perspective and unpack the entire process of what it takes to get materials into the hands of patrons.

### Eureka!

The City of Hillsboro has a culture of innovation and the City's Eureka! process plays a big role. It is a way of thinking about innovation and process improvement where employees are empowered to work together to find better ways to do their jobs and deliver excellent services. Eureka! employs a combination of Lean, Six Sigma, and other innovation tools and techniques. The name comes from the creative spark that ignites positive change. The library already had success using Eureka!; in 2016, we looked at our holds process and improved the lag time of getting holds to the shelf by 94 percent. For our new project, we used an intensive three-day Eureka! Rapid Improvement Event (RIE) to analyze our entire workflow—covering selection, acquisitions, cataloging, unpacking, and processing. Whew! It was a lot to bite off, but we knew we needed to look at the processes individually and study their connections to one another.

### Preparation

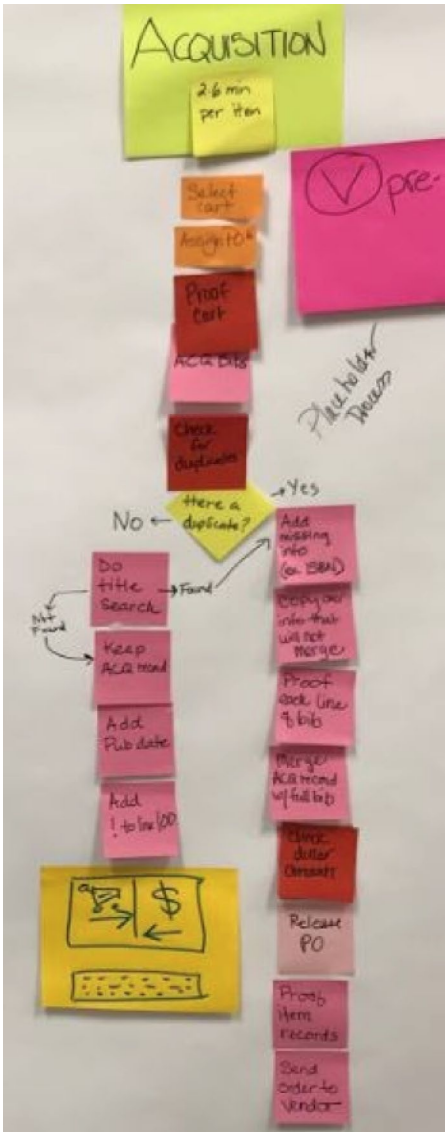
In the six months prior to the project, library staff completed process mapping of three areas: acquisitions, cataloging, and door-to-floor (unpacking and processing). From that work, we had already made some improvements. For example, we use Customized Library Services (CLS) to catalog and process most of our books. The three staff members who handle the CLS import mapped out the process step by step. Not only did they learn from one another, but we found quite a few tweaks to make with Washington County Cooperative Library Services (of which HPL is a member), the vendor, and our internal processes. These added up to a significant time savings per load. Furthermore, we developed a two-tiered process allowing us to train more staff to share this daily work.

We continued to map all of the individual processes (lots and lots of sticky notes!) to serve as our roadmap and visual aid for the team. To prepare, we also interviewed staff doing the work to hear what they did, what was working well, and what was not.

### Team "No More Red Tape"

In July 2018, three library employees, three city employees, and our City's Innovation Team Leader met for the three-day RIE. It can be hard to step outside one's knowledge, experience, and preconceived notions. So, having outsiders in the group brought a fresh perspective. Library Director and RIE sponsor, Stephanie Chase, started us off by explaining why this work is a priority for the leadership team and what was driving the change. We were expected to be open to what came up and ask the questions that not many libraries were asking. Success was to open the box to see how far we could look inside.

The goals were essentially the same as our public service model changes: 1) improve patron experience by providing access to materials as quickly as possible while still maintaining integrity and quality of work, and 2) provide more opportunities for staff interested in learning and working with materials. This would also ensure cross-training to avoid bottlenecks in workflow with staff and volunteer absences.




## Selection and Acquisitions

During the RIE, we used 5 Whys when looking at acquisitions. Taken from Lean Management, 5 Whys is part of the Eureka! toolkit. It's a way to explore the cause-and-effect relationships underlying problems by asking simple questions. On this process map, the dark red sticky notes indicate time-consuming steps. We asked: Why are we behind in acquisitions? Because orders take a long time. Why do they take a long time? Because we have to calculate discounts. Why do we have to calculate discounts? Because the cart is mixed with paperbacks and hardbacks and they get different discounts. Why do we have mixed carts? Because that's the way selectors build their carts. Why do selectors build carts this way? Because that's how they've always done it. We learned that we needed to take a closer look at the selection process.

After several rounds of 5 Whys, we saw a strong relationship between selection and acquisitions. We were able to significantly reduce the time it took the acquisitions team to place each order by changing procedures on the selection end. Instead of mixing formats, collections and/or funds in one order, we decided on one format, one collection, and one fund per order.

We also changed the size of orders. Due to schedules that include time on the public floor with patrons, acquisitions staff knew they were most efficient when they could get orders done in one-hour chunks. That led to a change in procedures for selectors to submit orders containing a maximum of 30-40 items. We also decided to train each selector in the acquisitions process so they would better understand the downstream implications of their decisions or errors. Plus, this would give us a back-up pool of people to pitch in when orders built up. We also saved time by empowering acquisitions staff to make certain decisions about editing orders, such as correcting obvious mistakes.

## Cataloging

In addition to the changes already made with the CLS process, the RIE uncovered more cataloging efficiencies. We learned that decisions made during selection and acquisitions can have a negative impact on CLS. For example, ordering sets of materials creates a headache in the process, so selectors are now more aware and thoughtful when deciding to order sets.

Another outcome of the RIE was to prioritize pursuing CLS for additional formats and vendors. Although CLS is a cost outlay, previous analysis determined that the money spent

was significantly less than what was spent on staff time to do the work. Staff positions were not in jeopardy because our collaborative service model changes how their time is spent.

We realized that our main backlog of items were those needing original cataloging. We have limited staff hours and expertise for this time-intensive work, so we focused on how to balance growing a diverse collection centered on our community's needs with our limited cataloging resources. We started purchasing original cataloging from vendors where possible (after reviewing the quality of their records). We also started bringing catalogers to the table with selectors before embarking on purchasing new formats or items from non-traditional vendors. Just because we can get records from a vendor doesn't mean the quality is sufficient or that we have the processes and templates in place to handle them. By bringing catalogers in early, we could assess the impact on staff time and create expectations around priorities before placing orders.

## Unpacking and Processing

Mapping out door-to-floor processes gave us the most contact with the people and space. We went on a Gemba Walk, another Lean process. The idea is to experience the physical space, touch the items and listen. Ask staff how they feel and how things work. We learned that the workspace was cluttered, and it was not often clear to staff which items were a priority.

Some things were quick and easy to change, like removing shelving that was messy and full of binders collecting dust. Other things took longer to implement, like rearranging cubicles and furniture in the work area to design spaces for workstations and carts to match the workflow. These changes have made it easier to get a visual read on the work and potential bottlenecks.

The processing phase is when we came up with our team name "No More Red Tape." One processing task is putting red tape on all new items and writing the month/year as a visual cue. We put red tape through the 5 Whys and decided to get rid of it. Our non-library team members had no idea what the tape represented. If we got rid of it, we could eliminate a tedious task and create visual cues in other ways, like clear signage on and near bookshelves.

## Impact on Staff

One project goal was to provide more opportunities for staff interested in learning and working with materials. The Eureka! process gave us a clear understanding of individual tasks making up each process. From that, we were able to identify which tasks took basic, intermediate, or advanced skills. We broadened our cataloging and acquisitions team and now have more staff trained to do the work. Our more experienced staff play a key role as trainers and mentors. We've created redundancies and no longer have just one volunteer or employee who knows how to do a certain task. One staff member expressed relief because she no longer feels stressed out about being absent or even taking a vacation; she knows others will be there to do the work.

## Takeaways

The RIE revealed many places to tweak our work. We also learned a few takeaways that can apply more generally to process improvement projects:

1. The ripple effect—What happens in one area has an impact downstream.

2. Clutter creates confusion—When there isn't visual clarity about what comes next, staff don't know how to prioritize their time.

3. Cross-training helps workflow—Unburden and empower staff to share and collaborate.

4. Question what you are doing—Is something necessary or a holdover from a bygone time? If it is necessary, can a vendor do it?

5. Allow those doing the work to inform the process—An outside perspective is key to getting outside the box, but those doing the work have details that inform the process. Both are critical.

6. Change management is an important part of the process—How people feel is as important as what they think. Listen and involve them in solutions. Communicate more than you think is necessary. People take pride in what they do; recognize that a change may connect to a core value and be difficult to accept. Understanding that goes far.

## Conclusion

The RIE gave us an action plan of short, medium, and long-term changes to implement. Some are in place, some are taking longer than expected, some are great, and some need to be reevaluated. Team "No More Red Tape" got rid of a lot of "bureaucratic" red tape, but we are still in the pilot phase with our literal red tape. Upon closer inspection, we realized we hadn't fully examined other parts of the process like changing item record collection codes from new to "not new" and programming the materials handling equipment. We're still working on it! If we've learned one thing for sure during our Eureka! RIE, it's that we're in a perpetual state of iteration because there's no innovation without iteration.

## Further Resources

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