Making Change, Increasing Value: Reorganizing Your
Access Services Department

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University of Maryland Libraries

Access Services Conference

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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
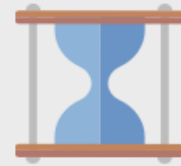
establish a **sense of urgency**

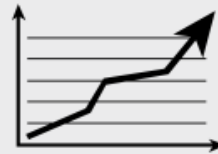create the **guiding coalition**

develop a **vision and strategy**

generate **short-term wins**

empower employees for broad-based action

communicate the change vision

consolidate gains and **produce more change**

anchor new approaches in **the culture**

Adapted from John Kotter. Leading Change. Boston: Harvard UP, 1996.

Success!

Reorganization Process Timeline

Guiding Coalition Formed
10/15/2014

Task Groups report to staff
7/30/2015

Kick Off Meeting
11/12/2014

Staff Retreat
1/16/2015

Card Sorting Exercise
4/21/2015

Reorganization Effective Date
9/20/2015

2014

Oct | Nov | Dec | 2015 | Feb | Mar | Apr | May | Jun | Jul | Aug | Sep

2015

Time **Logging**
11/10/2014   11/21/2014

1/19/2015   **Time Log Analysis**   4/3/2015

Org Chart Drafts & Revisions
4/22/2015   6/15/2015

6/15/2015   **Rewriting Job Descriptions**   8/14/2015

6/15/2015   **Task Groups**   7/29/2015

User Services & Resource Sharing

Timothy Hackman

Director

Library Services
James Spring
Coordinator

Resource Sharing & Reserves
Hilary Thompson
Head of Resource Sharing & Reserves

Collection Maintenance & Retrieval
Margaret Loebe
Coordinator

Late Night Services
Adnan Qureshi
Coordinator

Billing, Accounts, & Community Borrowers
Evelyn Yocco
Coordinator

Terrapin Learning Commons
Andrew Horbal
Head of Learning Commons

Logistics and Periodicals
Paula Greenwell
Coordinator

Cynthia Harris (LST - PT)
Mohammed Jaleel (LSSp-PT)
Kibbi Henderson (LSSp - C2)
George Ramsey (LSSp) - 0.5
Lydia Savage (LSSu) - 0.5*
Charles Wright (Coordinator) - 0.5*
Michael Zeliff (LSSu)
Ashley Haddix (Graduate Assistant)

Jennifer Cotton (LSSp - C2 - PT)
Douvonte Farmer (LSSp)
Margaret Jeffers (LSSp)
Arthur Natishan (LSSp - C2)
James Weber (LSSp)
Chris Winters (LSSp) - 0.5*
Austin Smith (LSSu)
Vacant (LST - C1) - 0.5

Ken Carps (LSSp) - 0.5
Joshy Choorakuzhy (LST) - 0.5*
Kathy Pickard (LST - PT)
George Ramsey (LSSp) - 0.5*
Lee-Jong Teo (LST - C2 - PT)
Jerome Weiland (LSSp)
Vacant (LST - C1) - 0.5*

Antonio Hill (LST)
Anna Nabity (LST)

Chris Winters (LSSp) - 0.5
Charles Wright (Coordinator) - 0.5

Kevin Hammett (Coordinator)
Kesavan Kumar (Account Clerk III)
Abigail Carroll (LSSp - C1 - PT)
Charles Tam (LSSp - C1 - PT)
Marian Dorsey (LSSp)

Christopher Bunn (LSSp - PT)*
Ken Carps (LSSp) - 0.5*
Joshy Choorakuzhy LST) - 0.5
Lydia Savage (LSSp) - 0.5
Vacant (LSSu)

Cynthia Harris (LST - PT)

Mohammed Jaleel (LSSp-PT)

Kibbi Henderson (LSSp - C2)

George Ramsey (LSSp) - 0.5

Lydia Savage (LSSu) - 0.5*

Charles Wright (Coordinator) - 0.5*

Michael Zeliff (LSSu)

Ashley Haddix (Graduate Assistant)

Christopher Bunn (LSSp - PT)*

Ken Carps (LSSp) - 0.5*

Joshy Choorakuzhy LST) - 0.5

Lydia Savage (LSSp) - 0.5

Vacant (LSSu)

Retrieval and Scanning: Before

ILL

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

Print ILL pull slips
Print DD 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 · **2** · **3** · **4**

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

Pull Items
* By CMR/LNS Staff
* By Floor & Shelving Location

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

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

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

Pack items for UPS
Logistics & Periodicals

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:
UPS mail (ILL)
FedEx (ILL)

PM: Pack:
Blue bin (ILL)
USPS mail (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

9:00 AM — Unpack: Blue bin (ILL/PPH); US mail (ILL); Red Bins (PPH/ILL)

11:00 AM — Unpack: UPS (Transfers/ILL/PPH)

12:00 PM — Green Bins (Branch Items - PPH/ILL)

2:00 PM — Unpack: Shady Grove Green Bins [only MWF] (Transfers/ILL/PPH)

3:00 PM — Unpack: Fedex Ground (ILL)

3:00-4:00 PM — Pack: UPS (ILL)

5:00 - 10:00 PM — Pack: US mail (ILL); Campus Mail (Dept. Delivery); SG Bin [Sun, Tu, Th]; Green Bins (Transfers/PPH) (all picked up the next morning)

Desk Scheduling: Before

- No reliable method for backup and shift coverage
- Questions of fairness arose in break room conversation

THE OLD WAY

WAYS TO STRESS YOUR STAFF

001.

Hours

No clear relation of hours to job description

Desk hours were assigned based on previous years and old desk models. Little changed even when staff levels fluctuated.

002.

Vague Backup Plan

ALL HANDS ON DECK (ALL THE TIME)

Chronic missed shifts and little accountability.

003.

Low Morale

STRESS AND LOW CONFIDENCE

Staffing the desk caused headaches for various units with little warning. Inequity in work affected top employees.

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

Spring 2016 Desk Responsibility

44.5

Billing

CM&R

L&P

5.7%

RSR

LSU

42%

Legend: Billing | CM&R | L&P | LSU | RSR
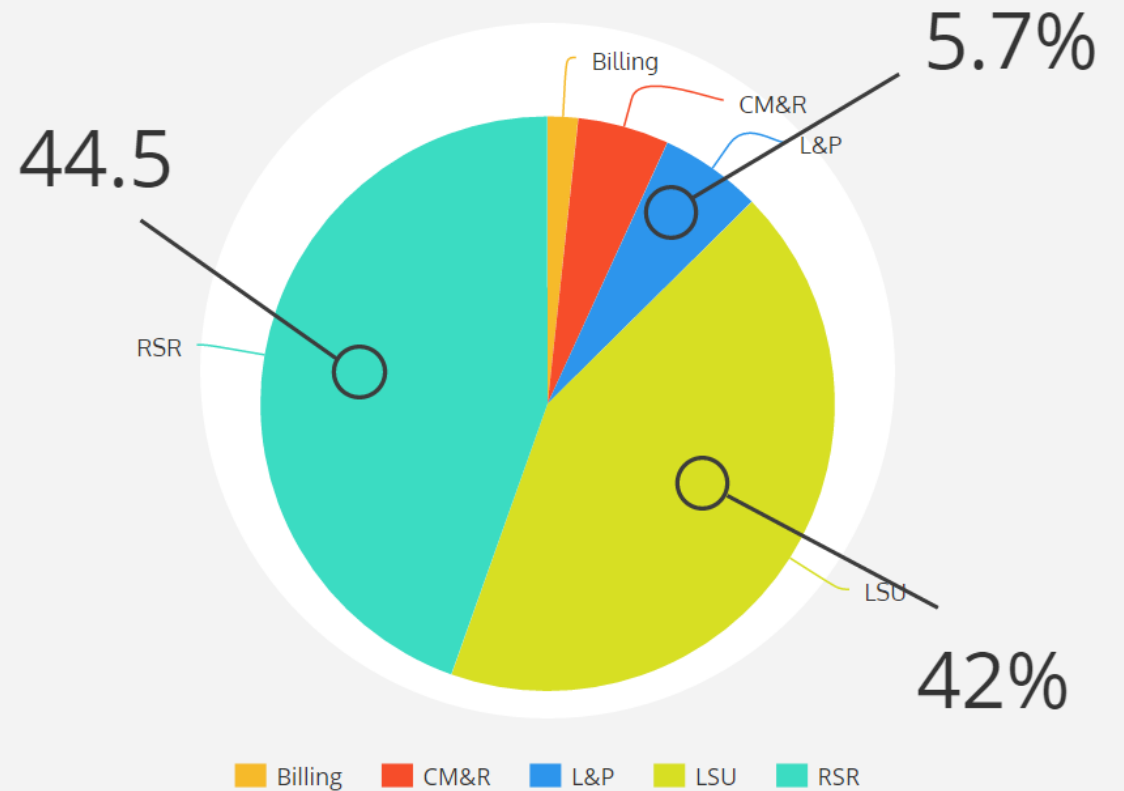
Student Supervision: Before

Student Supervision: After
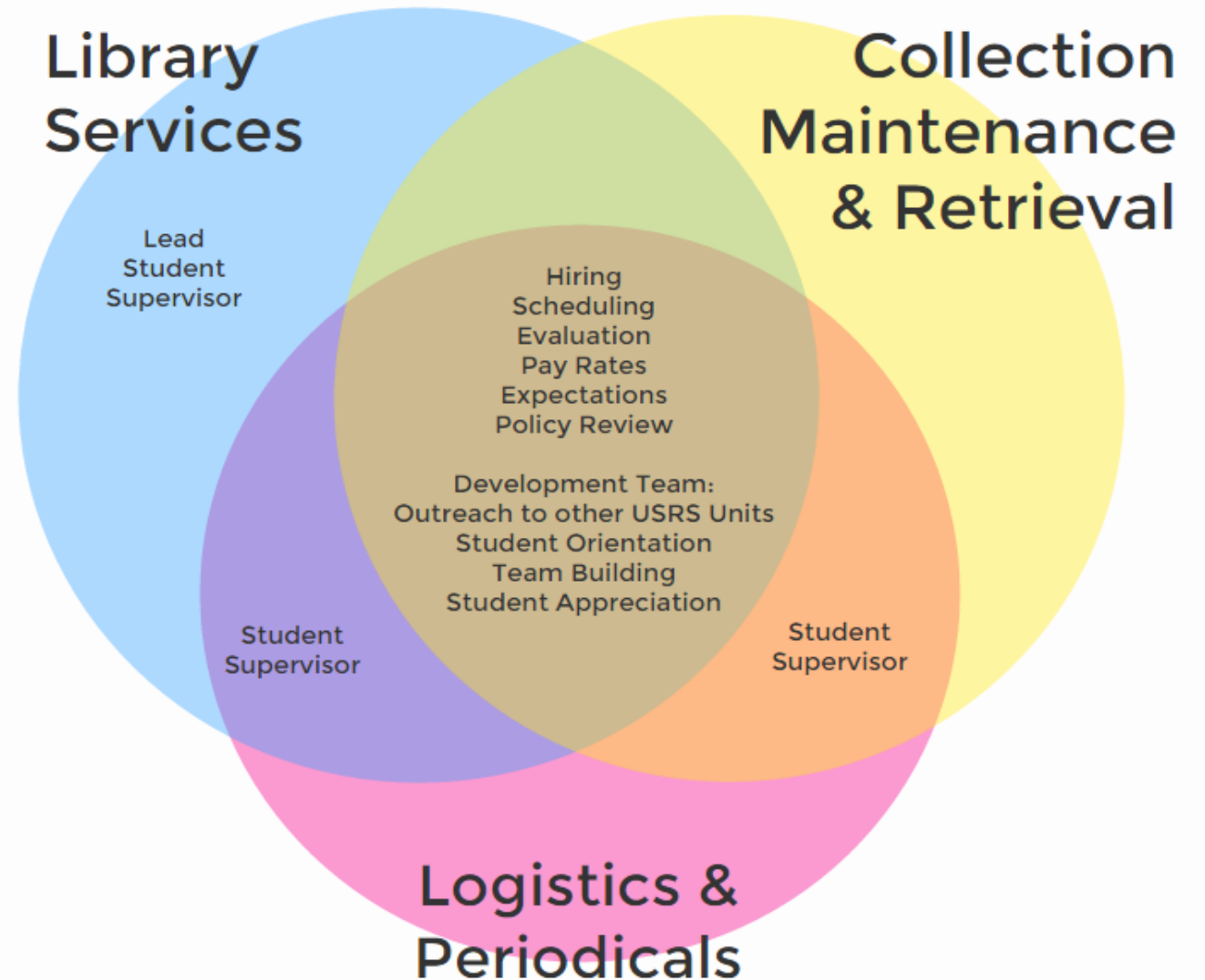
Assessment

3 General Goals:
- Improve efficiency of operations
- Increase staff engagement
- Improve the user experience

Assessment – Goal 1

Labor & Assistance Requests	FY2016	FY2017	% Change
Total Funds Requested	$524,462	$508,414	- 3.06%
Total Hours Requested	49,932	49,012	- 1.84%
Learning Commons	9,984	10,780	+ 7.97%
Stacks	7,050	6,240	- 11.49%
Late Night	6,336	6,840	+ 7.95%
Interlibrary Loan	9,282	9,408	+ 1.36%
Library Services Desk	17,280	15,744	- 8.89%

Assessment – Goals 1 - 3

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

Strongly disagree	Disagree	Neutral	Agree	Strongly agree
1	2	3	4	5

3.88

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

Strongly disagree	Disagree	Neutral	Agree	Strongly agree
1	2	3	4	5

3.71
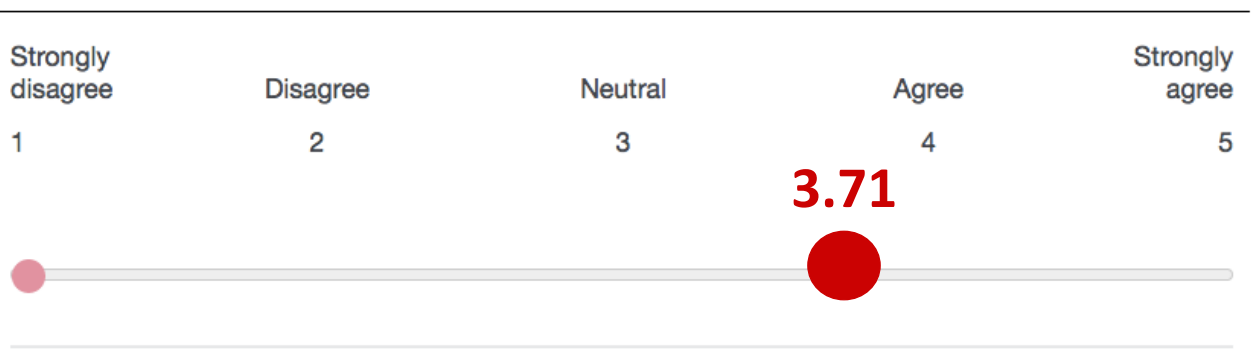
2. I feel that my ideas have more of an impact on the USRS department than they did before the reorganization.

Strongly disagree	Disagree	Neutral	Agree	Strongly agree
1	2	3	4	5

3.56
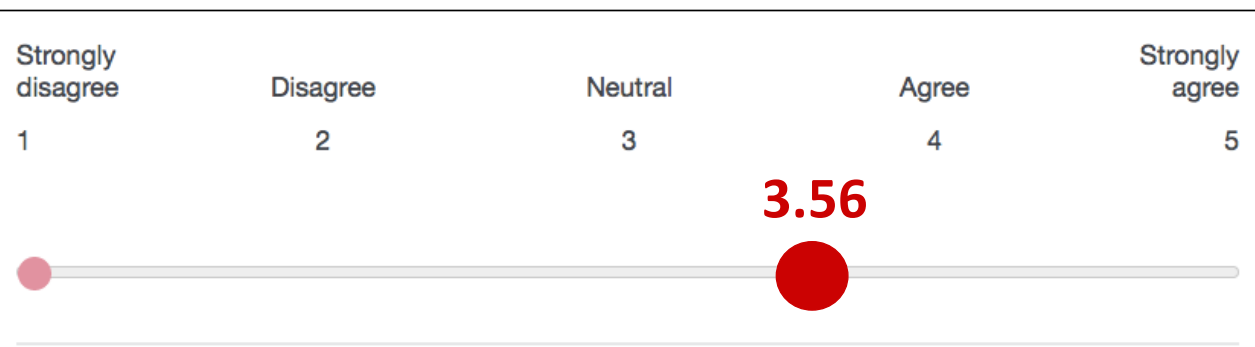
4. I feel that library users are generally more satisfied with the services provided by the USRS department than they were before the reorganization.
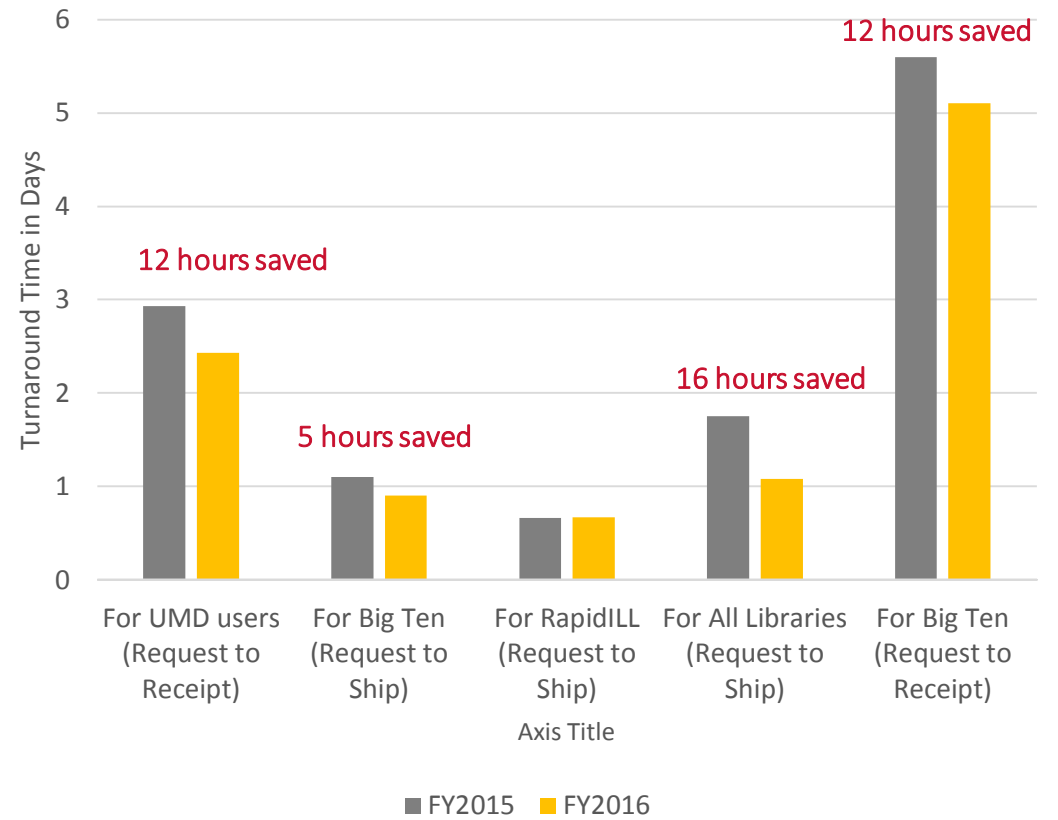
Strongly disagree	Disagree	Neutral	Agree	Strongly agree
1	2	3	4	5

3.65
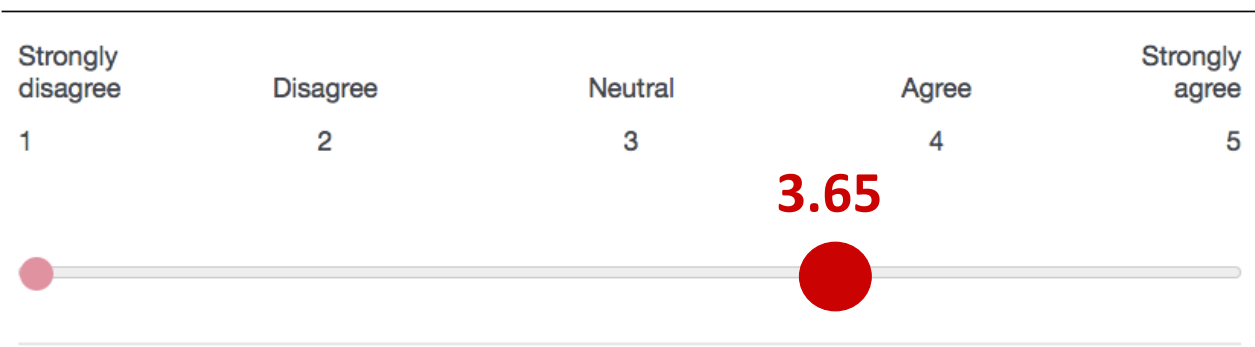
Assessment – Goals 1 & 3

Assessment – Goals 1 & 3

Average Turnaround Time for Lending by Month
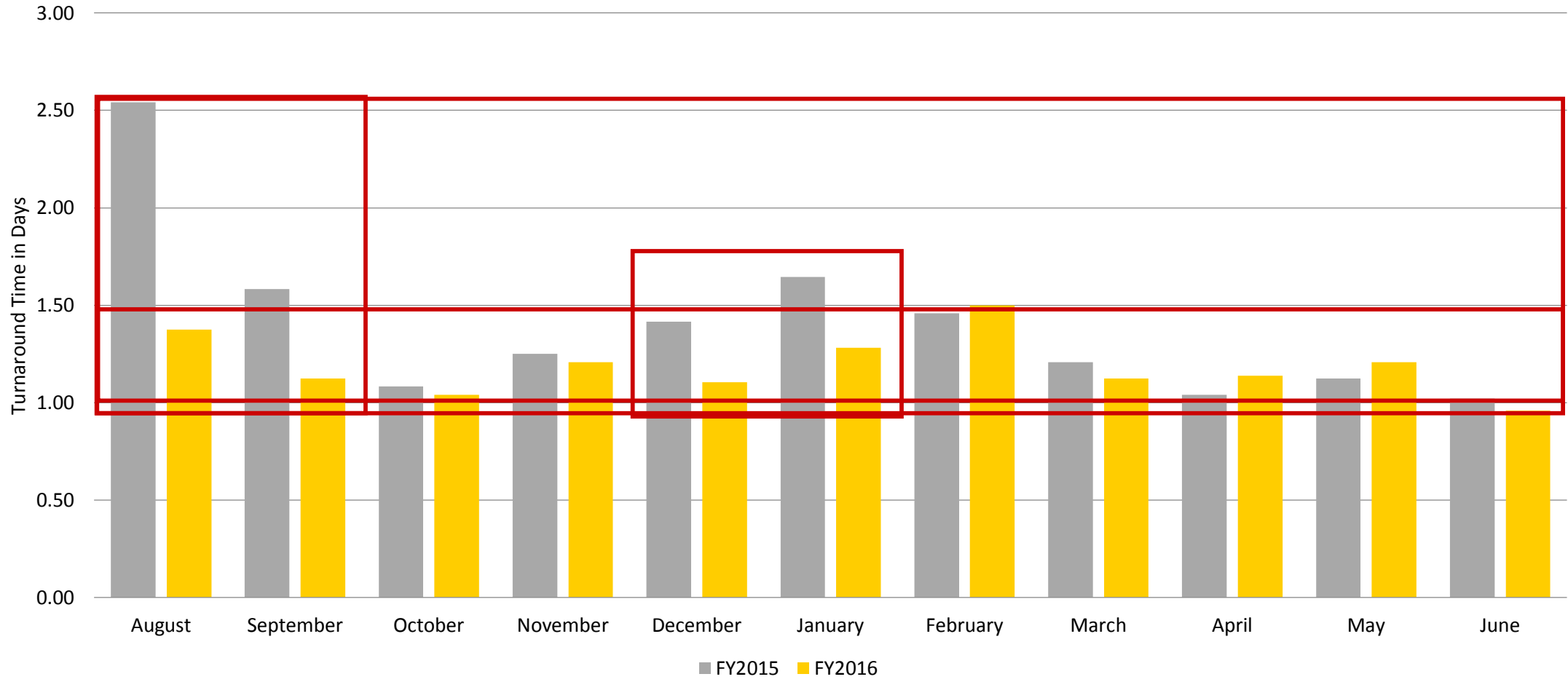
Lessons Learned

- 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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