

In preparing to move forward, we looked across the Library’s service processes to understand how the various tasks fit together. We have color coded each task such that related tasks are represented by a common color.

Pre-Arrival		User Interaction		Education & Orientation		Info Search & Retrieval	
Key Activities	Tasks	Key Activities	Tasks	Key Activities	Tasks	Key Activities	Tasks
Marketing	Communicate Library Services To Faculty By Subject Specialist	Signage	Review Signage	Library Orientation (user driven)	Receive Requests	Collection Development	Select Materials
	Communicate Library Services to Students		Remove Unnecessary Signs		Process Through Coordinator		Deselect Materials
Security	Close Library		Create New Signs		Library Tour	Execute	Collection Acquisition
	Enforce Library-wide Policies and Procedures	Maintain Signage		Evaluate	Shelve Items		
	Maintain Entrances & Exits	Maintain Staffing Levels for Public Service	Library Orientation (proactive)	Communicate Availability of Training/Orientation	Website & Remote Access	Design of Website	
	Maintain Parking Lot	Hire Employees		Partner/ Collaborate with Faculty to determine Training/Orientation Requirements		Add/Update Content	
Phone Calls	Determine Nature of Call	Orient & Train Employees		Develop Training Agenda	Interlibrary Loan	Courier Materials to Faculty	
	Determine Number of Parking Spaces	Provide Consistent weekday Evening & Weekend Coverage (future)		Execute		Reserves	Make Reserves Available to Patrons
Parking	Issue Parking Privileges	Communicate & Clarify Roles & Responsibilities (future)	Evaluate	Copying	Manage Copy Machine Operation		
	Secure Parking Lot	Departments Provide Orientation to Their Staff	Initiate Communication w/ Faculty		Select Copy Machines		
	Monitor Parking Lot for Approved Parkers	Departments Develop Written Orientation Packets (future)	Facility Faculty Orientation (on-site or off-site)	Audiovisual	Select, Order & Deselect AV Material		
	Clean & Maintain Parking Lot	Develop Library Policy and Procedures on Handling Complaints	Identify Curricular Expectations		Provide access and Playback		
	Hours	Determine Hours of Operations	Develop Consistent Procedure for Answering Phone (future)		Design Plan to Meet Assessed Information Requirements	Archives	Process & Catalog Collections
		Departments Develop Policies & Procedures for Answering Email Requests (future)	Share Plan with Requesters & Library	Provide Web Access to Collections			
		Email Requests	Execute	Promote Archives to Faculty & Students			
		Communicate Library Services/ Implement Feedback	Evaluate				
		Study Space	Assess Training Needs	Education & Orientation (continued)			
			Post Conference Room Policies and Procedures on Web	Identify Resources	Key Activities	Tasks	
			Increase Study Spaces During Reading/Exam Period	Publicize Training Sessions			Needs Analysis
		Improve Study Rooms & Carrels	Execute	Web-based Instruction		Design	
			Evaluate			Test/Refine	
			Assess Training Needs Relative to Education & Orientation			Execute	
			Identify Resources	Consultation		Initial Contact	
			Develop Staff Training Sessions			Determine Information Needs & Develop Strategy	
			Execute			Evaluate	
			Evaluate	How-To's		Assess Existing User Guides	
			Scheduling			Evaluate	
			Resource Utilization/Optimization	Information Literacy		Instruction	
			Evaluate				

LEGEND	
	Communicate to Faculty
	Operational Improvements
	Communications/Marketing/PR
	Technology
	Policies & Procedures
	Training
	HR/Staffing

We have identified eight common categories of tasks that can be addressed by Implementation Teams.

Strengthen Linkage with Faculty	Operational Improvements	Communications/Marketing/PR
<p><u>Marketing</u></p> <ul style="list-style-type: none"> Communicate Library Services to Faculty <p><u>Library Orientation/Library Tours</u> (user-driven)</p> <ul style="list-style-type: none"> Receive Requests Process Through Coordinator Execute Evaluate <p><u>Library Orientation</u> (proactive)</p> <ul style="list-style-type: none"> Partner/Collaborate with Faculty to Determine Training/Orientation Requirements <p><u>Outreach to Faculty</u></p> <ul style="list-style-type: none"> Initiate Communication with Faculty Facilitate Faculty Orientation (on-site or off-site) Identify Curricular Expectations Design Plan to Meet Assessed Information Requirements Share Plan with Requesters & Library Execute Evaluate <p><u>Collection Development</u></p> <ul style="list-style-type: none"> Select Materials Deselect Materials <p><u>Consultation</u></p> <ul style="list-style-type: none"> Initial Contact Determine Info Needs & Develop Strategy Evaluate <p><u>Web-based Instruction</u></p> <ul style="list-style-type: none"> Needs Analysis Design Test/Refine Execute/Evaluate <p><u>How-To's</u></p> <ul style="list-style-type: none"> Assess Existing User Guides Evaluate <p><u>Information Literacy</u></p> <ul style="list-style-type: none"> Instruction <p><u>Audiovisual</u></p> <ul style="list-style-type: none"> Select, Order & Deselect AV Material 	<p><u>Phone Calls</u></p> <ul style="list-style-type: none"> Determine Nature of Call <p><u>Security</u></p> <ul style="list-style-type: none"> Close Library Maintain Entrances & Exits <p><u>Parking</u></p> <ul style="list-style-type: none"> Secure Parking Lot Monitor Parking Lot for Approved Parkers <p><u>Training Labs</u></p> <ul style="list-style-type: none"> Scheduling Resource Utilization/Optimization Evaluate <p><u>Collection Acquisition</u></p> <ul style="list-style-type: none"> Catalog Items Shelve Items <p><u>Interlibrary Loan</u></p> <ul style="list-style-type: none"> Courier Materials to Faculty <p><u>Reserves</u></p> <ul style="list-style-type: none"> Make Reserve Items Available to Patrons <p><u>Archives</u></p> <ul style="list-style-type: none"> Process & Catalog Collections <p><u>Parking</u></p> <ul style="list-style-type: none"> Determine number of parking spaces Issue parking privileges Clean & maintain parking lot <p><u>Study Space</u></p> <ul style="list-style-type: none"> Increase Study Spaces During Reading/Exam Period Improve Study Rooms & Carrels <p><u>Copying</u></p> <ul style="list-style-type: none"> Manage Copy Machine Operation Select Copy Machines <p><u>Audiovisual</u></p> <ul style="list-style-type: none"> Provide Access & Playback 	<p><u>Marketing</u></p> <ul style="list-style-type: none"> Communicate Library Services to Students <p><u>Signage</u></p> <ul style="list-style-type: none"> Review Signage Remove Unnecessary Signs Create New Signs Maintain Signage <p><u>Communicate Library Services/Implement Feedback</u></p> <ul style="list-style-type: none"> Communicate Available Services in Library <p><u>Library Orientation</u></p> <ul style="list-style-type: none"> Communicate Availability of Training/Orientation <p><u>User Training</u></p> <ul style="list-style-type: none"> Publicize Training Sessions <p><u>Archives</u></p> <ul style="list-style-type: none"> Promote Archives to Faculty & Students
	Technology	Policies & Procedures
	<p><u>Website & Remote Access</u></p> <ul style="list-style-type: none"> Design of Website Add/Update Content Provide Remote Access <p><u>Audiovisual</u></p> <ul style="list-style-type: none"> Select, Order & Deselect AV Material Provide access and playback <p><u>Archives</u></p> <ul style="list-style-type: none"> Provide Web Access to Collections 	<p><u>Security</u></p> <ul style="list-style-type: none"> Enforce Policies and Procedures <p><u>Hours</u></p> <ul style="list-style-type: none"> Determine Hours of Operations <p><u>Explanation/Consultation</u></p> <ul style="list-style-type: none"> Develop Library Policies and Procedures on Handling Complaints <p><u>Phone Requests</u></p> <ul style="list-style-type: none"> Develop Consistent Procedure for Answering Phone <p><u>Email Requests</u></p> <ul style="list-style-type: none"> Departments Develop Policies and Procedures for Answering Email Requests <p><u>Study Space</u></p> <ul style="list-style-type: none"> Post Conference Room Policies and Procedures on Web

Training
<p><u>Staffing</u></p> <ul style="list-style-type: none"> Orient & Train Employees <p><u>Explanation/ Consultation</u></p> <ul style="list-style-type: none"> Departments Provide Orientation to Their Staff Departments Develop Written Orientation Packets <p><u>Library Orientation</u></p> <ul style="list-style-type: none"> Develop Training Agenda <p><u>User Training</u></p> <ul style="list-style-type: none"> Assess Training Needs Identify Resources Execute Evaluate <p><u>Staff Training</u></p> <ul style="list-style-type: none"> Assess Training Needs Relative to Education & Orientation Identify Resources Develop Staff Training Sessions Execute Evaluate

HR/Staffing
<p><u>Staffing</u></p> <ul style="list-style-type: none"> Define/Assess Each User Interaction Point Assess Staffing Levels for Public Service Hire Employees Communicate & Clarify Roles & Responsibilities Provide Consistent Weekday Evening & Weekend Coverage

LEGEND	
	Communicate to Faculty
	Operational Improvements
	Communications/Marketing/PR
	Technology
	Policies & Procedures
	Training
	HR/Staffing

APPENDIX II



A Division of The Caleris Companies

*'Connecting strategy to performance
and performance to people'*

Project First Choice

Implementation Plan

-FINAL-



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Contents

This document is comprised of five sections beginning with the Executive Summary which illustrates the importance of a service strategy in the overall achievement of the vision for the Library. The core of the report, however, is the detailed Implementation Plan which documents specific tasks across the Library that will provide the service levels required to achieve the Vision, Mission and Values.

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Contents

The executive summary provides a complete summary of the project and is provided for those less interested in the more detailed Implementation Plan.

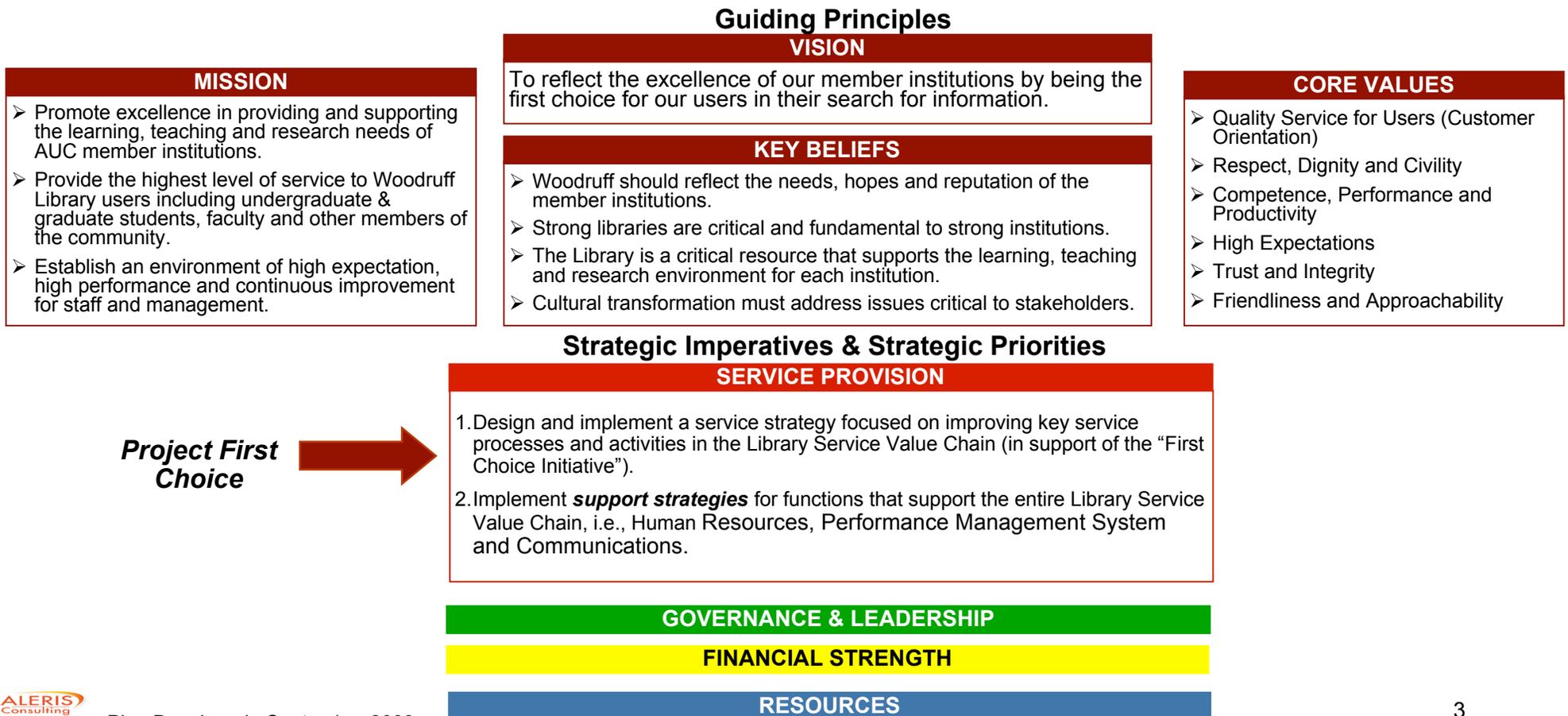
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Executive Summary Guiding Principles

The Woodruff Library’s primary product is providing information services of one kind or another to its member institutions.

Included in the Guiding Principles of the library’s Strategic Plan are four primary strategies which when successfully completed will allow the Library to start significant progress toward its vision of “being the first choice for our users in their search for information.”

The most significant of these four strategies is the establishment of a comprehensive service strategy that addresses all critical service areas in the Library.



Executive Summary

The service strategy was named appropriately “Project First Choice” and the Implementation Plan will be the focus of this report. It will include the work plan for the next year as a guide to the organization in its efforts to vastly improve all Library services and enhance the user’s service experience from pre-arrival to departure. The project approach included three fundamental principles that will become institutionalized as a part of the organization as it moves forward.



Executive Summary Service Value Chain

A team comprised of the Library Management Team was assembled to identify, prioritize, and recommend steps to improve those processes identified as critical to achieving the Library's vision. Processes, activities, and/or tasks that were working at an acceptable level were excluded. A service value chain was established which identified the four highest priority categories that must be improved.

Pre-Arrival

This category was seen as important because there are issues that have historically discouraged users from coming to the Library. There were strong feelings in the students focus group surrounding security, parking, hours and shuttle services. It was felt that addressing these barriers and an effective marketing program would remove many of the barriers that keep users from coming to the Library.

User Interaction

The User Interaction Process Team looked at all of the points of interactions with users as they enter the Library or interact with the Library, whether by human interaction or other means such as phones and signage. This team focused on frontline activities that rely on personal contact and on improving how these services are provided.

Education & Orientation

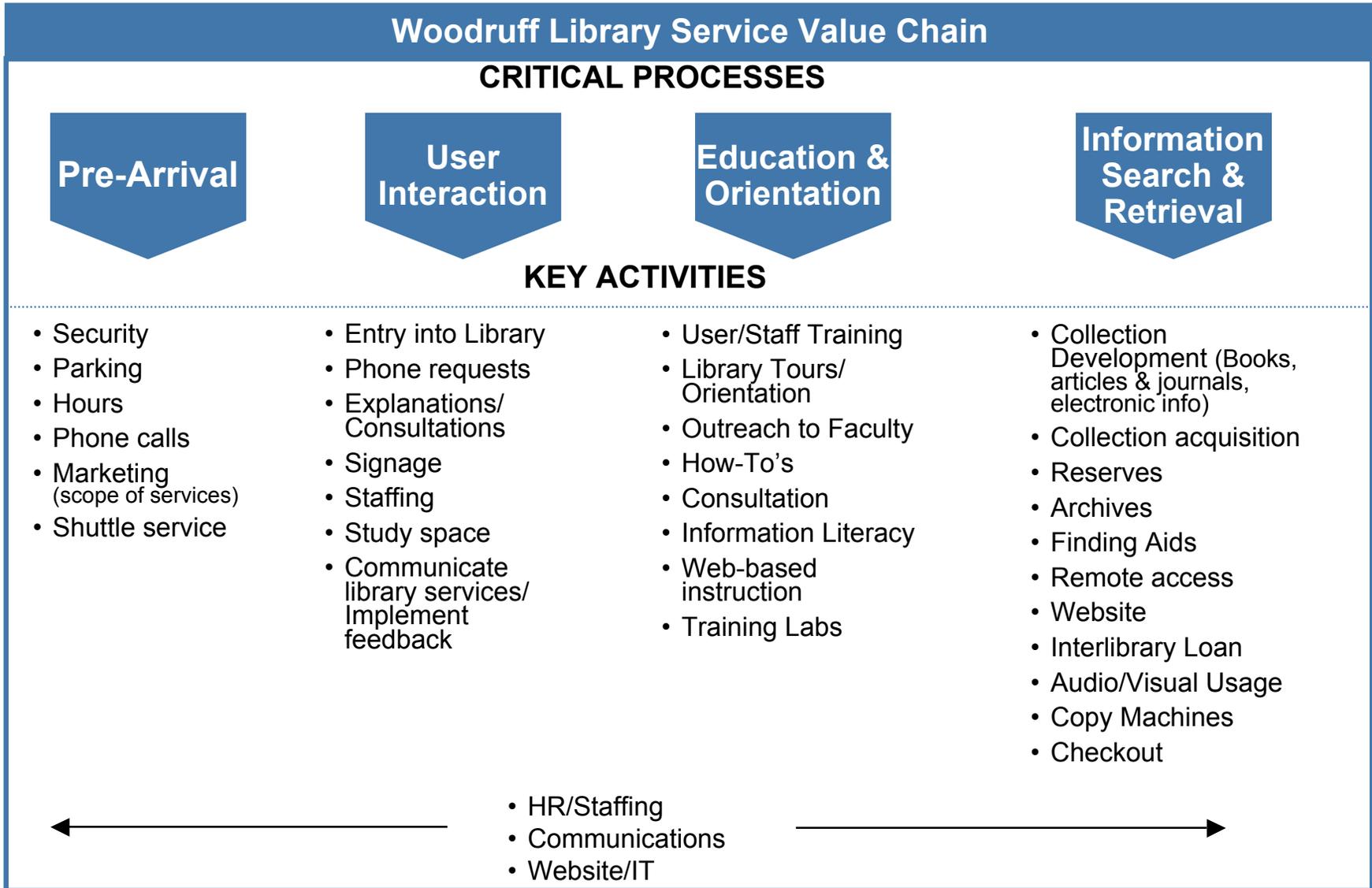
This team focused its attention on the education and orientation of users to the services available in the Library. Collaboration and teaming between faculty and Library Subject Specialists emerged as the highest priority for improving the quality of information services.

Information Search & Retrieval

Information Search and Retrieval focused its efforts on improvements to where information is acquired, what information is acquired, and best practices used to retrieve information.

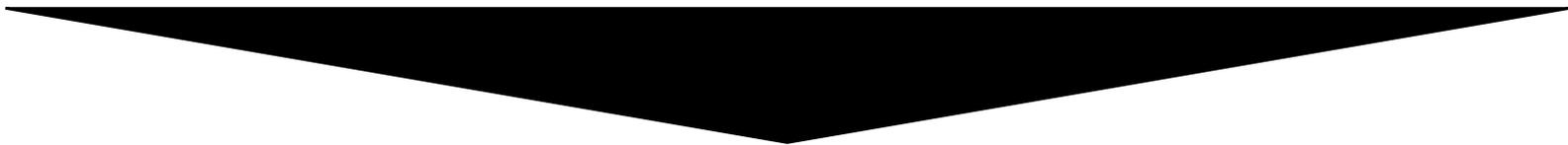
Executive Summary Service Value Chain

The committee very carefully identified all of the activities and functions within the library that were critical to improving each of the four key processes.



Executive Summary Project Overview

The team participated in an in-depth analysis of the Service Value Chain which included problem analysis, task redesign and implementation planning for each of the key activities. This led to three primary strategies for the Library.



Three Primary Strategies

1	Information Services Strategy	Improve quality of information in the Library and users' ability to use that information.
2	Operations Improvement Strategy	Identify and improve the most critical service processes.
3	Administrative & Support Strategy	Identify and improve all support functions (enablers) that cross-functionally support continuing progress toward sustainable improvement.

Executive Summary Key Strategies

As a result, three strategies emerged as the most critical elements of the Library’s Service Strategy and were the three strategies that guided the development of the Implementation Plan. These strategies include all of the critical tasks that have been the primary focus of the teams work over the last several months.

Information Services Strategy

Improve quality of information in the Library and users’ ability to use that information.

Strategy 1 addresses the core of the Library’s purpose of providing information for users. The Library’s ability to understand what information is required by its users, collecting that information and helping users to utilize that information is the focus of this strategy.

Key Results

- Subject Specialists/Faculty Partnership Strategy
- Faculty-Student Orientation Plan
- Revised Collection Development Policy

Operations Improvement Strategy

Identify and improve service affecting processes within the Library.

This strategy will focus on those operations processes identified as critical and not working properly. Security, parking, collections acquisition, reserves, archives, and phones calls are among the operations processes that must be improved.

Key Results

- Joint Campus Security Plan
- Automated Interlibrary Loan Process
- Archive Backlog Reduction
- Parking Plan

Administrative & Support Strategy

Identify and improve all support functions (enablers) that cross-functionally support continuing progress toward sustainable improvement.

Human Resources, Performance Management, training, communications planning and Library web presence will be the focus of this strategy.

Key Results

- Performance Management System
- Comprehensive Training Agenda
- Communications Plan
- Website Assessment & Recommendations
- Complaint Management Process
- Security Policies & Procedures

Executive Summary Information Services Strategy

Fundamental to the strategy of improved information services is collaboration with faculty and the formation of faculty library teams to ensure improvement and relevant and updated information services.

Information Services Strategy

Improve quality of information in the Library and users' ability to use that information.

Strengthen the Linkage Between the Library and Faculty

- A. Establish Subject Specialist-Faculty partnership to better understand curricular needs.
- B. Establish a more effective collection development policy.
- C. Establish student and faculty orientation and instruction plan.

Executive Summary Operations Improvement Strategy

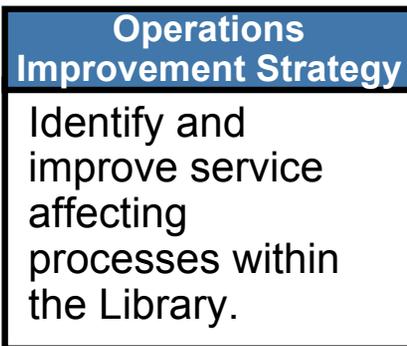
The operations improvement strategy addresses the many operational areas across the Library that require improvement. The tasks that are considered the highest priority for improvement are included.

1. Improve the Most Critical Areas of Library Security.

- A. Enhance security around the perimeter of the library and between the library and member institutions.**
- B. Secure library entrances and exits.**
- C. Better manage the parking spaces in the parking lot.**
- D. Improve the monitoring and security in the parking lot.**

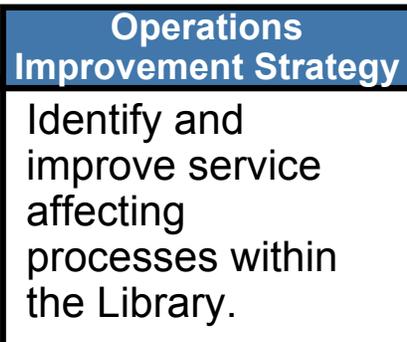
2. Make Operational Improvements in Selected Library Departments.

- A. Ensure reserve items are available for users in a timely manner.**
- B. Ensure that archives and special collections are processed and cataloged in a timely manner.**
- C. Automated operations of the interlibrary loan process.**
- D. Ensure that library collections, print and electronic, are catalogued, shelved and linked appropriately.**
- E. Manage training labs more effectively.**
- F. Improve the handling of incoming phone calls.**



Executive Summary Operations Improvement Strategy

The operations improvement strategy addresses the many operational areas across the Library that require improvement. The tasks that are considered the highest priority for improvement are included.



3. Improve Utilization of Library Space.

- A. Develop a space utilization plan for the Library.**
- B. Improve study space for group and individual study.**
- C. Ensure that copy machines are adequate to meet the needs of users.**
- D. Provide an improved audio/visual facility for multimedia collections.**
- E. Enhance the appearance of the parking lot.**

Executive Summary Administrative & Support Strategy

The administrative and support strategy addresses all of the key support areas that span the entire Library. The tasks identified below facilitate the improvements and Library transition.

Administrative & Support Strategy

Identify and improve all support functions (enablers) that cross-functionally support continuing progress toward sustainable improvement.

- 1. Meet Internal and External Training Needs.**
 - A. Provide basic orientation to library staff.**
 - B. Provide customized training for subject specialists.**
 - C. Provide customized training for frontline employees.**
 - D. Provide functional training for staff.**

- 2. Address Key Human Resources and Staffing Issues.**
 - A. Improve library's staffing of public service areas.**
 - B. Develop a Library Performance Management System.**
 - C. Communicate key HR processes and functions.**

- 3. Update and Develop Key Service Policies and Procedures.**
 - A. Update security policies and procedures.**
 - B. Determine most effective hours of operations & standardize opening and closing hours.**
 - C. Develop a Complaint Management Process.**
 - D. Draft policy on handling email requests.**

Executive Summary Administrative & Support Strategy

The administrative and support strategy addresses all of the key support areas that span the entire Library. The tasks identified below facilitate the improvements and Library transition.

Administrative & Support Strategy

Identify and improve all support functions (enablers) that cross-functionally support continuing progress toward sustainable improvement.

4. Improve Website Content and User Accessibility.

- A. Utilize website assessment as a guide to improve website.**
- B. Provide process for submitting and maintaining content.**
- C. Provide remote access to library resources and services.**

5. Improve Marketing and Communications About the Library.

- A. Promote library services to faculty and students.**
- B. Improve signage in Library.**
- C. Communicate library services within the library & implement feedback.**

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The implementation overview provides more detail on the implementation of each strategy with particular focus on the expected outcomes.

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Information Services Strategy Overview

Fundamental to the strategy of improved information services is collaboration with faculty and the formation of faculty library teams to ensure improvement and relevant and updated information services.

Information Services Strategy	Improve quality of information in the Library and users' ability to use that information.	
Key Activity	Strengthen the Linkage Between the Library and Faculty	
Major Task	Purpose	Outcome
A. <i>Establish Subject Specialist-Faculty partnership to better understand curricular needs.</i>	Collaborate with faculty to support their needs in teaching and research by providing needed informational materials to students and professors.	A positive faculty experience and a positive perception of Library staff competencies and helpfulness in meeting their curricular needs.
B. <i>Establish a more effective collection development policy.</i>	Provide a Library collection that will meet the curricular needs, including study, teaching and research of stakeholders.	Stakeholder groups share confidence that the Library collection is relevant and adequate to meet their study, teaching and research needs.
C. <i>Establish student and faculty Library Orientation Plan.</i>	<ul style="list-style-type: none"> a. To provide a structured program to introduce new students and faculty to basic library resources and services. b. Provide course-related instruction to reinforce learning. c. Inform users of library orientation processes, available services and informational resources. 	<ul style="list-style-type: none"> a. A formal orientation program that is valuable to stakeholders, and is successful in shaping our students as independent researchers, critical thinkers and lifelong learners. b. All stakeholders understand and utilize the Library's services and resources.

Information Services Strategy Work Plan

Increasing the interaction between the subject specialists and faculty in order to better support the curriculum is the basis for this key activity.

Information Services Strategy	Improve quality of information in the Library and users' ability to use that information.			
Key Activity: Strengthen the Linkage Between the Library and Faculty				
Major Task: Establish Subject Specialist-Faculty partnership to better understand curricular needs				
Sub-Tasks	Detailed Improvement Steps	Responsible Party	Resources Required	Measurements/Metrics
Provide Training for Subject Specialists	<ul style="list-style-type: none"> • Provide consultant/library educator for customized subject specialist training, including: <ul style="list-style-type: none"> – Successful faculty interaction (including proper attire) – Faculty meeting checklist – Packaging handouts for relevancy and impact – Analyzing the course syllabi – Bridging curricular understanding to collection development, interlibrary loan, and bibliographic instruction • Develop evaluation instrument 	C. Hart	Training budget	Course proficiency
Meet with Department/ Program Chairs	<ul style="list-style-type: none"> • Gather information, i.e. faculty expectations, resource requirements (journals/databases), number of majors, etc • Collect syllabi to analyze for understanding, subject areas, new areas 	C. Hart	Back-up coverage for subject specialists	Meeting evaluation from faculty
Meet with Faculty	<ul style="list-style-type: none"> • Discuss any changes in the curriculum • Identify research areas 	C. Hart	Back-up coverage for subject specialists	Meeting evaluation from faculty
Develop Instruction & Training Plan in Alignment with Curricular Needs	<ul style="list-style-type: none"> • Determine training needs from curriculum analysis • Develop training program for users needs • Coordinate training to place on training agenda • Monitor ongoing training needs of subject specialists 	C. Hart	C. Hart with a focus on training users	<ul style="list-style-type: none"> • # of training sessions • Feedback from participants

Information Services Strategy Work Plan

In order to ensure the most relevant materials are available in the Library, a new collection development policy must be created to support the information acquisition.

Information Services Strategy	Improve quality of information in the Library and users' ability to use that information.			
Key Activity: Key Activity: Strengthen the Linkage Between the Library and Faculty				
Major Task: Establish a More Effective Collection Development Policy				
Sub-Tasks	Detailed Improvement Steps	Responsible Party	Resources Required	Measurements/ Metrics
Assign Staff to Coordinate Collection Development (CD) Policy Improvement	<ul style="list-style-type: none"> Determine who should lead the CD effort (single leader with a team) Give person authority to develop policy Make CD a part of his/her Library responsibility and performance criteria 	Collection Development Coordinator	CD Coordinator	Performance evaluation
Review Existing Collection Development Policy	<ul style="list-style-type: none"> Gather current CD policy Review for relevancy to existing environment and curriculums Develop a CD assessment in order to assess the various areas of the policy 	Collection Development Coordinator	CD policy committee	CD Assessment
Draft a New Collection Development Policy	<ul style="list-style-type: none"> Create a collection development template of the various things to include Populate template to create a CD draft 	Collection Development Coordinator	CD policy committee	CD Assessment
Hire CD Consultant to advise on Draft CD Policy	<ul style="list-style-type: none"> Interview several consultants to aid in CD development Choose one consultant to support Library effort Request consultant to assess CD draft and make recommendations Request consultant to review final CD policy 	Collection Development Coordinator	<ul style="list-style-type: none"> CD Consultant Budget for consultant 	CD Assessment
Finalize Draft CD Policy Based on Consultant Recommendations	<ul style="list-style-type: none"> Finalize draft as stated CD policy Educate subject specialists and librarians on new CD policy Review policy on periodic basis (annually) 	Collection Development Coordinator	Written policy	Review process for effectiveness with faculty

Information Services Strategy Work Plan

Specific operations improvements will greatly improve and facilitate the orientation of users and staff to information services within the Library.

Information Services Strategy	Improve quality of information in the Library and users' ability to use that information.			
Key Activity: Key Activity: Strengthen the Linkage Between the Library and Faculty				
Major Task: Establish student and faculty Library Orientation Plan				
Sub-Tasks	Detailed Improvement Steps	Responsible Party	Resources Required	Measurements/Metrics
Organize orientation committee	<ul style="list-style-type: none"> • Meet with AUC orientation program directors for support • Determine type of committee to be organized: standing, advisory, special or ad hoc • Identify committee members, roles and responsibilities • Draft committee mission, charge, goals, objectives • Share draft with Library Director for approval • Publicize approved document with stakeholders 	C. Hart R. Odom	Committee members	Participation
Conduct General Library Tours	<ul style="list-style-type: none"> • Assign Librarians to weekly tour duty • Set standard times for tours • Publicize tour availability and times 	C. Hart	Training for staff	<ul style="list-style-type: none"> • # of tours • Feedback from form
Develop Standard Tour Script	<ul style="list-style-type: none"> • Develop key messages & talking points to be covered • Review with each department for completeness and correctness • Place tour script in manual for distribution to tour givers 	C. Hart	Communications advice	Feedback from form
Develop Virtual Tour Electronic Distribution	<ul style="list-style-type: none"> • Choose videographer to produce video tour • Work with IT to place on website • Provide link on website to virtual tour 	Robert Fallen	Videographer	# of tours taken online
Evaluate Handouts and Update As Needed	<ul style="list-style-type: none"> • Collect and assess existing handouts • Determine needed handouts • Develop new handouts 	C. Hart	<ul style="list-style-type: none"> • Budget for professional orientation materials 	Assessment

Information Services Strategy Work Plan

Specific operations improvements will greatly improve and facilitate the orientation of users and staff to information services within the Library.

Information Services Strategy	Improve quality of information in the Library and users' ability to use that information.			
Key Activity: Key Activity: Strengthen the Linkage Between the Library and Faculty				
Major Task: Establish student and faculty Library Orientation Plan				
Sub-Tasks	Detailed Improvement Steps	Responsible Party	Resources Required	Measurements/Metrics
Conduct New Faculty/Student Orientation	<ul style="list-style-type: none"> • Requests Colleges to make new faculty/ student orientation mandatory • Schedule each College in first two weeks of school • Provide orientation materials 	C. Hart	<ul style="list-style-type: none"> • A/V system for exhibition hall • Large ceiling to floor screen • Standalone podium 	<ul style="list-style-type: none"> • # of participants • Feedback from form
Provide Subject Related Instruction	<ul style="list-style-type: none"> • Determine needs of students users for subject related instruction • Provide training to subject specialists if needed 	C. Hart	Facilities for teaching	<ul style="list-style-type: none"> • # of participants • Feedback from form
Communicate Services to Users	<ul style="list-style-type: none"> • Use various vehicles to reach users, including school newspapers, website, mailings, flyers, faculty 	Caleris (interim)	Communications plan	Increase in usage

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This section addresses the many operational improvements within the Library.

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The operations improvement strategy addresses the many operational areas across the Library that require improvement. The tasks that are considered the highest priority for improvement are included.

Operations Improvement Strategy	Identify and Improve the Most Critical Service Processes Within the Library.	
Key Activity 1	Improve the Most Critical Areas of Library Security.	
Major Tasks	Purpose	Outcome
A. Enhance Security Around the Perimeter of the Library and Between the Library and Member Institutions.	Collaborate with Member Institutions' police forces to provide a more secure environment for users to reach the Library.	Users have a safe, secure way to access the Library from their respective campuses.
B. Secure Library Entrances and Exits.	Provide a consistent, professional experience at Library entrances and exits.	Ensure that only authorized persons enter the Library and no unauthorized Library materials are taken from the Library.
C. Better Manage the Parking Spaces in the Parking Lot.	Ensure that the limited number of parking spaces are maximized to accommodate the key stakeholder groups.	A parking lot in which assigned spaces are reserved for approved parkers and the remaining parking spaces are well managed for the most appropriate parkers.
D. Improve the Monitoring and Security in the Parking Lot	To create a safe secure parking environment.	A parking lot where parkers and their vehicles are safe from harm.

Operations Improvement Strategy Work Plan *Library Security*

Security, both inside and outside of the Library, was a very high priority in student focus groups.

Operations Improvement Strategy	Identify and improve the most critical service processes.			
Key Activity 1: Improve Most Critical Areas of Library Security				
Major Tasks	Detailed Improvement Steps	Responsible Party	Resources Required	Measurement/Metric
Collaborate With Other Member Institutions' Police Force To Secure the Perimeter of the Library and Provide Security Between the Institutions and the Library.	<u>Joint Police Effort</u> <ul style="list-style-type: none"> • Library Director requests College Presidents to cooperate with improved security efforts • Library Director meets with member institutions' police chiefs to discuss potential plan • Police chiefs devise a plan to jointly patrol library perimeter and between institutions and Library. • Plan is instituted for fall semester 	<ul style="list-style-type: none"> • Library Director • A. Clark 	<ul style="list-style-type: none"> • Council of Presidents • Member Institutions' police forces • Joint security coordinator 	<ul style="list-style-type: none"> • # of incidents around the Library
Provide Secure Access to the Library from the Member Institutions	<u>Library Shuttle Service</u> <ul style="list-style-type: none"> • Clarify purpose of shuttle services <ul style="list-style-type: none"> – Library only – AUC-wide transportation • Create appropriate route • Determine schedule • Implement service 	A. Clark	<ul style="list-style-type: none"> • Dedicated shuttle van and driver 	<ul style="list-style-type: none"> • Ridership on shuttle

Operations Improvement Strategy Work Plan *Library Security*

Security, both inside and outside of the Library, was a very high priority in student focus groups.

Operations Improvement Strategy	Identify and improve the most critical service processes.			
Key Activity 1: Improve Most Critical Areas of Library Security				
Major Tasks	Detailed Improvement Steps	Responsible Party	Resources Required	Measurement/Metric
Close Library	<ul style="list-style-type: none"> • Record a closing message to be played during closing at 30 minutes, 15 minutes and 5 minutes before closing. • Circulation desk plays the pre-recorded closing message from a CD or other digital format for clarity and durability. • Security patrols Library using a consistent and polite wording when asking users to exit. (i.e., The Library is closing, please exit the building and have a good night.) • Security staff receives customer service training and workshops • Users are allowed into the Library up to actual closing time. • Lights remain on until users and staff have exited. • Final security check is completed 	<ul style="list-style-type: none"> • W. Holt • A. Clark 	Digital recorder	On-time openings and closings
Maintain entrances and exits	<ul style="list-style-type: none"> • Use one officer at entrance and exit points. • Post one security officer inside the front exit gate to check identification upon entering and check bags for books upon leaving. • Place rope to route incoming users past this desk to show ID. • Two officers may be used at peak times. • Security consistently checks every bag upon entrance and exit. • Investigate alternative security systems for Library materials 	A. Clark	Redesigned security checkpoint	Utilize “test users” instructed to bring contraband into the Library and remove unchecked books from the library.

Operations Improvement Strategy Work Plan *Library Security*

Security, both inside and outside of the Library, was a very high priority in student focus groups.

Operations Improvement Strategy	Identify and improve the most critical service processes.			
Key Activity 1: Improve Most Critical Areas of Library Security				
Major Tasks	Detailed Improvement Steps	Responsible Party	Resources Required	Measurement/Metric
<p>Issue Parking Privileges and Assign Spaces</p>	<ul style="list-style-type: none"> • 135 Spaces are available, with 25 allotted to Mass Com staff. To allocate space: <ul style="list-style-type: none"> – Issue annual parking stickers to Library and Mass Com staff only. – Reserve 58 spaces (or an adequate number) on lower parking level for staff parking. Clearly mark as “Library Staff Parking” with signage and by painting on the spaces. – Reserve the rest of the (non-handicap) parking on the lower level for faculty and visitors. Clearly mark “Faculty / Official Visitor” on these spaces. (Staff may also use these spaces if entire parking lot is full.) – Reserve 25 upper level spaces for Mass Com. Clearly mark “Mass Comm. Parking Only” – Remaining 60 upper level spaces can be used by students and other visitors any time the Library is open, at the discretion of the parking attendant. – Place warning stickers on unauthorized parkers and record license plate number – Boot or tow cars for repeat offenders – Communicate parking plan <i>Options for the future (not recommended at present):</i> <ul style="list-style-type: none"> – Consider posting “2 hour parking” signs in the upper lot. – Charge for parking, equivalent to amounts charged by campus parking decks. (Automated parking attendant for handling money – perhaps free after 4pm) – Increase parking space, either by building a deck or using college-owned property nearby. 	<p>A. Clark</p>	<ul style="list-style-type: none"> • Parking coordinator • Parking stickers or decals • Signage/painting contractor 	<ul style="list-style-type: none"> • # of warnings issued

Operations Improvement Strategy Work Plan *Library Security*

Security, both inside and outside of the Library, was a very high priority in student focus groups.

Operations Improvement Strategy	Identify and improve the most critical service processes.			
Key Activity 1: Improve Most Critical Areas of Library Security				
Major Tasks	Detailed Improvement Steps	Responsible Party	Resources Required	Measurement/Metric
Secure & Monitor the Parking Lot	<ul style="list-style-type: none"> • Provide a weatherproof security booth for the attendant near the lot entrance • Continue posting a parking attendant until 4 p.m. on weekdays, with regular patrols of the lot (at least hourly) during other times. <p><u>Options</u></p> <ul style="list-style-type: none"> • Consider card-controlled access lot for staff. • Consider control arm with security booth to control access to upper lot. 	A. Clark	Security booth	Incident log

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Operations Improvement Strategy Overview *Selected Library Departments*

Strategy 2 addresses the many operational areas across the Library that require improvement. Those tasks considered the highest priority for improvement are included.

Operations Improvement Strategy	Identify and Improve the Most Critical Service Processes Within the Library.	
Key Activity 2	Make Operational Improvements in Selected Library Departments.	
Key Activity	Purpose	Outcome
A. Ensure Reserve Items Are Available for Users in a Timely Manner.	To create a convenient, easy to access process for obtaining reserve items.	Users can easily and rapidly acquire reserve items from the Reserve desk.
B. Ensure That Archives and Special Collections Are Processed and Cataloged in a Timely Manner.	To meet the time commitments made to donors in processing their collections.	Timely archive processing resulting in more collections being exhibited onsite and offsite.
C. Automate Operations of the Interlibrary Loan Process.	To install automated, electronic processing of Interlibrary Loan materials.	ILL requests can be made and tracked online for both Library staff and users.
D. Ensure that Library Collections Are Catalogued and Shelved Appropriately.	To ensure all Library materials are catalogued and shelved correctly and in a timely manner.	All Library materials are in their correct position on the shelves and the electronic catalog.
E. Manage Training Labs More Effectively.	To manage training labs for more effective use as a Library resource.	Use of the training labs are optimized for training as well as other Library needs.
F. Improve the Handling of Incoming Phone Calls.	To provide a consistently positive experience when contacting and communicating with the Library by phone.	Callers are pleasantly greeted and have their questions answered to their satisfaction or their call is routed to the intended destination with minimal handoffs, i.e., less than two.

Operations Improvement Strategy Work Plan Selected Library Departments

Identification of and improvement to the most critical operational processes is fundamental to a sustainable service strategy.

Operations Improvement Strategy	Identify and improve the most critical service processes.			
Key Activity 2: Make Operational Improvements in Selected Library Departments				
Major Tasks	Detailed Improvement Steps	Responsible Party	Resources Required	Measurement/Metrics
Make Reserve Items Easily Accessible to Users	<ul style="list-style-type: none"> • Purge all irrelevant reserve items not currently in use. • Users providing enough specific information for retrieval of a Reserve item will not be asked to look the item up on the computer. • If a look-up is necessary, computers with free printing capability should be made available as close as possible to the Reserve Desk to minimize inconvenience. • Utilize the four computers at the pillar between Reference and Circulation for Reserve lookups. These should be networked to the Circulation Dept. printer to allow free printing of the Reserve citations. • Electronic Reserves should be initiated for easier access to materials, and to provide remote access. (See the ATMO 1 report “Electronic Reserves” by William Holt for complete specifications.) 	William Holt	<ul style="list-style-type: none"> • Computers with free printing capabilities • Active reserve items list 	<ul style="list-style-type: none"> • # of items on reserve • % of reserve items used

Operations Improvement Strategy Work Plan Selected Library Departments

Identification of and improvement to the most critical operational processes is fundamental to a sustainable service strategy.

Operations Improvement Strategy	Identify and improve the most critical service processes.			
Key Activity 2: Make Operational Improvements in Selected Library Departments				
Major Tasks	Detailed Improvement Steps	Responsible Party	Resources Required	Measurement/Metrics
Process and Catalog Archive Collections	<ul style="list-style-type: none"> • Clear existing backlog with a special project <ul style="list-style-type: none"> – Use students as temporary workers to work through backlog – Supply temporary workers with basic training to allow them to work on noncomplex items – Students can produce “container lists” for unprocessed collections and provide at least a minimal level of access. – More experienced staff must process and create finding aids. • Cataloging staff will be trained in cataloging archival materials. 	Karen Jefferson Dan Veach	<ul style="list-style-type: none"> • Temporary workers • Training sessions for workers • Cataloging staff 	<ul style="list-style-type: none"> • # of archives processed • Clearing of backlog
Automate Operations of the Interlibrary Loan Process	<ul style="list-style-type: none"> • Request approval of ILLIAD interlibrary loan management software • Determine installation timeframe if approved • Develop training and instruction sessions for staff and users 	C. Hart	<ul style="list-style-type: none"> • ILLIAD software • Training sessions 	<ul style="list-style-type: none"> • # of ILL items processed • Time required to process ILL requests

Operations Improvement Strategy Work Plan Selected Library Departments

Identification of and improvement to the most critical operational processes is fundamental to a sustainable service strategy.

Operations Improvement Strategy	Identify and improve the most critical service processes.			
Key Activity 2: Make Operational Improvements in Selected Library Departments				
Major Tasks	Detailed Improvement Steps	Responsible Party	Resources Required	Measurements/Metrics
Catalog Library Collection Materials	<ul style="list-style-type: none"> • Overnight updating now implemented for PALS, will be continued with Voyager. • Continue database cleanup. <ul style="list-style-type: none"> – Incorrectly cataloged items identified by the Inventory’s “Circ 80” report have been corrected. – Deletion of Missing Inventory books is currently underway. – Post-Voyager migration cleanup will be followed by ongoing database correction. – Ongoing quality control measures for cataloging will be instituted using monthly Voyager reports and OCLC CATME’s error-checking systems. • Staff will work with Voyager to implement an electronic notification system for selectors. 	Dan Veach	<ul style="list-style-type: none"> • Voyager • CATME software 	<ul style="list-style-type: none"> • Missing inventory report
Shelve Library Collection Materials	<ul style="list-style-type: none"> • Complete reconciliation using Missing Inventory Report. • Ensure routine shelf reading. • Correct and improve stack signage. • Review stacks arrangement to recommend an easier, more user-friendly layout. 	William Holt	<ul style="list-style-type: none"> • Staff time • Stack layout plan 	<ul style="list-style-type: none"> • Missing Inventory Report

Operations Improvement Strategy Work Plan Selected Library Departments

Identification of and improvement to the most critical operational processes is fundamental to a sustainable service strategy.

Operations Improvement Strategy	Identify and improve the most critical service processes.			
<i>Key Activity 2: Make Operational Improvements in Selected Library Departments</i>				
Major Tasks	Detailed Improvement Steps	Responsible Party	Resources Required	Measurements/Metrics
<p>Schedule & Optimize Use of Training Labs</p>	<ul style="list-style-type: none"> • Develop usage policy for specific training labs, i.e., upstairs lab used for computer lab overflow and downstairs lab used only during reading period. • Develop a master calendar online with password access • Training lab coordinator will manage schedule on the web. • Users should inform coordinator of cancellations as soon as possible. • Security and coordinator should leave lab doors unlocked during hours scheduled for classes. (Classes sometimes arrive late and find doors re-locked.) • Evaluate effectiveness of training labs 	<p>Robert Fallen C. Hart</p>	<ul style="list-style-type: none"> • Scheduling software • Online master calendar 	<ul style="list-style-type: none"> • Lab usage
<p>Determine Nature of Incoming Calls and Minimize Handoffs.</p>	<ul style="list-style-type: none"> • Provide one phone system across Library • Develop simple, user-friendly phone menu for attendant • Provide “Operator” option should connect to a trained person inside the Library. • Provide a trained phone attendant backup. • Route after hours, “Operator” calls to Reference desk • Institute a ‘No-Handoff Policy’ such that callers are transferred to correct department immediately. • Answer phone calls by the third ring • Staff answers phone with Department name and greeting, ‘May I help you?’ • Establish standardized voice mail greeting 	<ul style="list-style-type: none"> • J. E. Smith • Robert Fallen • LMT 	<ul style="list-style-type: none"> • Phone system • Backup attendant • Workspace for phone attendant • Training 	<ul style="list-style-type: none"> • # of handoffs

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Strategy 2 addresses the many operational areas across the Library that require improvement. Those tasks considered the highest priority for improvement are included.

Operations Improvement Strategy	Identify and Improve the Most Critical Service Processes Within the Library.	
Key Activity 3	Improve Utilization of Library Space.	
Key Activity	Purpose	Outcome
A. Develop a Library Space Utilization Plan.	To better utilize the entire Library space to better serve users.	A Library with well conceived design elements that make it convenient for users and meet their various study, work and research facility needs.
B. Improve Study Space for Group and Individual Study.	To improve study facilities to increase group study space and improve individual study areas.	The Library is a preferred place to study in groups and individually.
C. Ensure That Copy Machines Are Adequate to Meet the Needs of Users.	To match the needs of users with copy machine features such as two-sided copying, reductions, enlargements, stapling, etc.	Users' copying needs are meet with reliable, fully functioning equipment.
D. Provide an Improved Audio/Visual Facility for Multimedia Collections.	To provide a dedicated facility with updated equipment, which allows utilization of multimedia materials.	Audio/Visual facility with the latest technology to drive increased multimedia usage.
E. Repair and Maintain the Parking Lot.	Ensure that cleaning contractors keep the parking clean and free of litter daily.	Well-maintained parking lot where all parking spaces are able to be utilized.

Operations Improvement Strategy Work Plan *Library Facilities*

Optimization of facilities use is significant in that it improves asset utilization and the use of facilities in enhancing the overall experience while using the Library.

Operations Improvement Strategy	Identify and improve the most critical service processes.			
<i>Key Activity 3: Improve Utilization Library Space</i>				
<i>Major Tasks</i>	<i>Detailed Improvement Steps</i>	<i>Responsible Party</i>	<i>Resources Required</i>	<i>Measurements/Metrics</i>
Develop a Library Space Utilization Plan	<ul style="list-style-type: none"> • Interview architects to produce a space redesign/utilization plan • Hire an architect to complete study • Consider the following; <ul style="list-style-type: none"> – Converting room 303 to group study spaces – Converting institutional rooms to group study rooms – Space for a multimedia center – More study space 	Library Director	<ul style="list-style-type: none"> • Architect/Consultant 	Space utilization
Increase Group Study Space	<ul style="list-style-type: none"> • Make Room 301 immediately available for group study after 5pm. • Open Exhibition Hall to group study during reading period and exams, with furniture arranged for groups. 	Library Director	<ul style="list-style-type: none"> • Tables and chairs 	# of users
Improve Study Rooms and Carrels	<ul style="list-style-type: none"> • Provide better lighting and electrical outlets for laptop use. • Provide Internet connections. Consider wireless network as an option. • Provide some handicapped-accessible carrels usable with wheelchairs. • Include in space utilization study 	Robert Fallen Eric Miller	<ul style="list-style-type: none"> • Lighting • Wireless access points • Technology budget • Technology plan 	# of users

Operations Improvement Strategy Work Plan *Library Facilities*

Optimization of facilities use is significant in that it improves asset utilization and the use of facilities in enhancing the overall experience while using the Library.

Operations Improvement Strategy	Identify and improve the most critical service processes.			
<i>Key Activity 3: Improve Utilization Library Space</i>				
Major Tasks	Detailed Improvement Steps	Responsible Party	Resources Required	Measurements/Metrics
Select & Manage Copy Machine Operation	<ul style="list-style-type: none"> • Select copy machines with needed features • Provide public copiers with double-sided copying, stapling and sorting. • Clarify responsibility and publicize procedure for resolving copier problems, especially evenings and weekends. • Study need for centralized Copy Center for Library by requesting proposals from vendors 	<ul style="list-style-type: none"> • Library Director • William Holt • E. Miller 	<ul style="list-style-type: none"> • Finishers for copy machines • Maintenance agreements • Copy center study 	Copier usage
Provide Audiovisual Access and Playback	<ul style="list-style-type: none"> • Include in space planning project • Create a more spacious and better-equipped media center (either in conjunction with an enlarged CMC or separate from it). • Include a greater variety, numbers and quality of playback equipment. 	Carolyn Hart	<ul style="list-style-type: none"> • Playback equipment 	Usage
Clean and Maintain Parking Lot	<ul style="list-style-type: none"> • Instruct Building Services to gather bids to repair surface problems. • Building services can repair minor problems • Direct contractors to clean parking lot daily 	E. Miller	<ul style="list-style-type: none"> • Contractor services 	<ul style="list-style-type: none"> • Visual inspections • User complaints

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The Administrative & Support Strategy captures many of the support functions for the entire Library.

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Strategy 3 addresses all of the support areas that cut across the entire Library. The tasks identified below aid in enabling the improvements and Library transition.

<p>Administrative & Support Strategy</p>	<p>Identify and improve all support functions (enablers) that cross-functionally support continuing progress toward sustainable improvement.</p>	
<p>Key Activity 1</p>	<p>Meet Internal and External Training Needs</p>	
<p>Key Activity</p>	<p>Purpose</p>	<p>Outcome</p>
<p>A. Provide basic orientation to library staff.</p>	<ul style="list-style-type: none"> • To ensure that each employee has an understanding of the Library’s guiding principles and key Library orientation areas including: <ul style="list-style-type: none"> – Performance review process and its linkage to the Library’s guiding principles and supporting initiatives – Functions and services of each of the Library’s operating units and AUC history – HR policies, procedures and benefit package. 	<p>Each employee understands, connects to and embraces the Library’s guiding principles and accepts individual responsibility to effectively articulate these principles and deliver high-level services.</p>

Strategy 3 addresses all of the support areas that cut across the entire Library. The tasks identified below aid in enabling the improvements and Library transition.

<p>Administrative & Support Strategy</p>	<p>Identify and improve all support functions (enablers) that cross-functionally support continuing progress toward sustainable improvement.</p>	
<p>Key Activity 1</p>	<p>Meet Internal and External Training Needs</p>	
<p>Key Activity</p>	<p>Purpose</p>	<p>Outcome</p>
<p>B. Provide customized training for subject specialists.</p>	<ul style="list-style-type: none"> • To ensure that each subject specialist is equipped with the necessary skills sets to demonstrate to faculty that they understand their curricular needs and can reflect that understanding in instruction, training delivery and collection development. • To ensure that students get instruction tailored to their specific class assignments. • To ensure that subject specialists can deliver effective instruction on library resources that expand beyond the fundamentals of how to find a book, check out a book or the physical arrangement of resources in the library. 	<ul style="list-style-type: none"> • Faculty have confidence in the librarians' ability to deliver services and provide resources that support their curricular needs. • Students receive training and instruction sessions relevant to class assignments and projects. • Students are knowledgeable of the information resources relative to their chosen majors and have been trained on effective extraction techniques and utilization; they share their successes with other students and faculty
<p>C. Provide customized training for frontline employees.</p>	<p>To ensure all customer-interfacing staff are knowledgeable of all key services and resources within the library and can effectively assist students in their utilization of these resources.</p>	<ul style="list-style-type: none"> • Uniformity in service excellence across all public service points within the library, during all hours of operation – peak and non-peak hours; evenings & weekends.
<p>D. Provide Functional Training For Staff.</p>	<p>To ensure any skill gaps (identified within each functional unit) that impedes the employee's ability to effectively perform his/her responsibility is addressed through training.</p>	<p>Raise competency and confidence level of each unit employee relative to service excellence, job knowledge, employee development plan and/or career goals.</p>

Administrative & Support Strategy Work Plan *Library Training*

Training needs will be addressed across the various areas of the Library.

Administrative & Support Strategy	Identify and improve all support functions (enablers) that cross-functionally support continuing progress toward sustainable improvement.			
Key Activity 1: Meet Internal & External Training Needs				
Major Tasks	Detailed Improvement Steps	Responsible Party	Resources Required	Measurements/Metrics
Provide Basic Orientation for New Staff	<ul style="list-style-type: none"> • Update HR policies and procedures • Enhance orientation process and information packages <ul style="list-style-type: none"> – Include guiding principles in orientation packages – Include AUC history in orientation materials – Include tour as part of orientation process – Include facilitated departmental overviews – New performance criteria and expectations – Highlight competitive benefits package, including added benefits 	<ul style="list-style-type: none"> • A. Clarke • LMT 	<ul style="list-style-type: none"> • Training outline • Equipment budget 	<ul style="list-style-type: none"> • Feedback/Evaluation Forms
Provide Library Orientation	<ul style="list-style-type: none"> • Develop orientation outline/agenda for all staff • Develop training schedule/calendar, post and share interdepartmentally • Identify IT resources and coordinate facilitation • Provide orientation sessions before 7/31 • Provide staff sessions to reinforce behaviors associated with Library core beliefs and values <ul style="list-style-type: none"> – Document behaviors, share with staff and post in each department 	LMT	<ul style="list-style-type: none"> • Training outline 	<ul style="list-style-type: none"> • Feedback/evaluation forms

Administrative & Support Strategy Work Plan Library Training

Training needs will be addressed across the various areas of the Library.

Administrative & Support Strategy		Identify and improve all support functions (enablers) that cross-functionally support continuing progress toward sustainable improvement.		
Key Activity 1: Meet Internal & External Training Needs				
Major Tasks	Detailed Improvement Steps	Responsible Party	Resources Required	Measurements/Metrics
Provide Training on New Library Services and Resources	<ul style="list-style-type: none"> Identify and document new departmental resources or services Develop training agenda/plan, schedule/calendar Deliver training Collect feedback 	LMT	<ul style="list-style-type: none"> Training outline Training labs Product vendors Equipment budget for laptops and other portable resources 	<ul style="list-style-type: none"> Feedback/Evaluation Forms Reduction in customer service complaints
Provide Customized Training for Librarians	<ul style="list-style-type: none"> Document training criteria Share with subject specialists for feedback and/or enhancement Identify scholarly trainers Solicit training proposal based on training needs Request approval for proposed training cost from Library Director Coordinate back up coverage for subject specialists Implement training Collect feedback 	C. Hart	<ul style="list-style-type: none"> Training outline Training proposal Trainer (Library scholar) 	Feedback/Evaluation Forms

Administrative & Support Strategy Work Plan Library Training

Training needs will be addressed across the various areas of the Library.

Administrative & Support Strategy	Identify and improve all support functions (enablers) that cross-functionally support continuing progress toward sustainable improvement.			
Key Activity 1: Meet Internal & External Training Needs				
Major Tasks	Detailed Improvement Steps	Responsible Party	Resources Required	Measurements/Metrics
Provide Functional Training for Each Department	<ul style="list-style-type: none"> Identify and document departmental training needs Share training needs with HR Director for identification and coordination of common training needs Identify training resources (internal or external) Identify training costs Request training approval budget from Library Director Develop training agenda/plan, schedule/calendar Coordinate coverage Deliver training Collect feedback 	<ul style="list-style-type: none"> A. Clarke LMT 	<ul style="list-style-type: none"> Training outline Training budget 	Feedback/evaluation forms
Provide Training for Frontline staff	<ul style="list-style-type: none"> Identify training needs for frontline employees Determine cross-training needs for public services staff Develop training agenda Share training agenda with HR Director for coordination on common interdepartmental training needs Identify training resources (internal or external) Identify training costs Request training approval budget from Library Director Develop training agenda/plan, schedule/calendar Coordinate coverage Deliver training Collect feedback 	<ul style="list-style-type: none"> C. Hart W. Holt K. Jefferson D. Veach 	<ul style="list-style-type: none"> Training outline Training budget Training provider (external or internal) 	<ul style="list-style-type: none"> Feedback/Evaluation Forms Reduction in customer service complaints

Administrative & Support Strategy Work Plan *Library Training*

Training needs will be addressed across the various areas of the Library.

Administrative & Support Strategy	Identify and improve all support functions (enablers) that cross-functionally support continuing progress toward sustainable improvement.			
Key Activity 1: Meet Internal & External Training Needs				
<i>Major Tasks</i>	<i>Detailed Improvement Steps</i>	<i>Responsible Party</i>	<i>Resources Required</i>	<i>Measurements/Metrics</i>
Provide User Training for Students and Faculty	<ul style="list-style-type: none"> • Identify training needs for students and faculty based on faculty meetings and curriculum analysis • Develop training strategies, outline and calendar • Identify library resources supporting training needs • Develop training template • Populate training template based on course objectives and library resources • Identify IT resources and coordinate facilitation • Deliver training • Collect feedback 	C. Hart	<ul style="list-style-type: none"> • Training outline • Training budget 	Feedback/ evaluation forms
Provide Leadership Training for Library	<ul style="list-style-type: none"> • Determine topics to be covered • Determine participants • Secure outside consultant to facilitate • Provide workshops prior to implementing plan 	A. Clark	<ul style="list-style-type: none"> • Implementation plan • Performance Management System 	Performance evaluation

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The Administrative & Support Strategy captures many of the support functions for the entire Library.

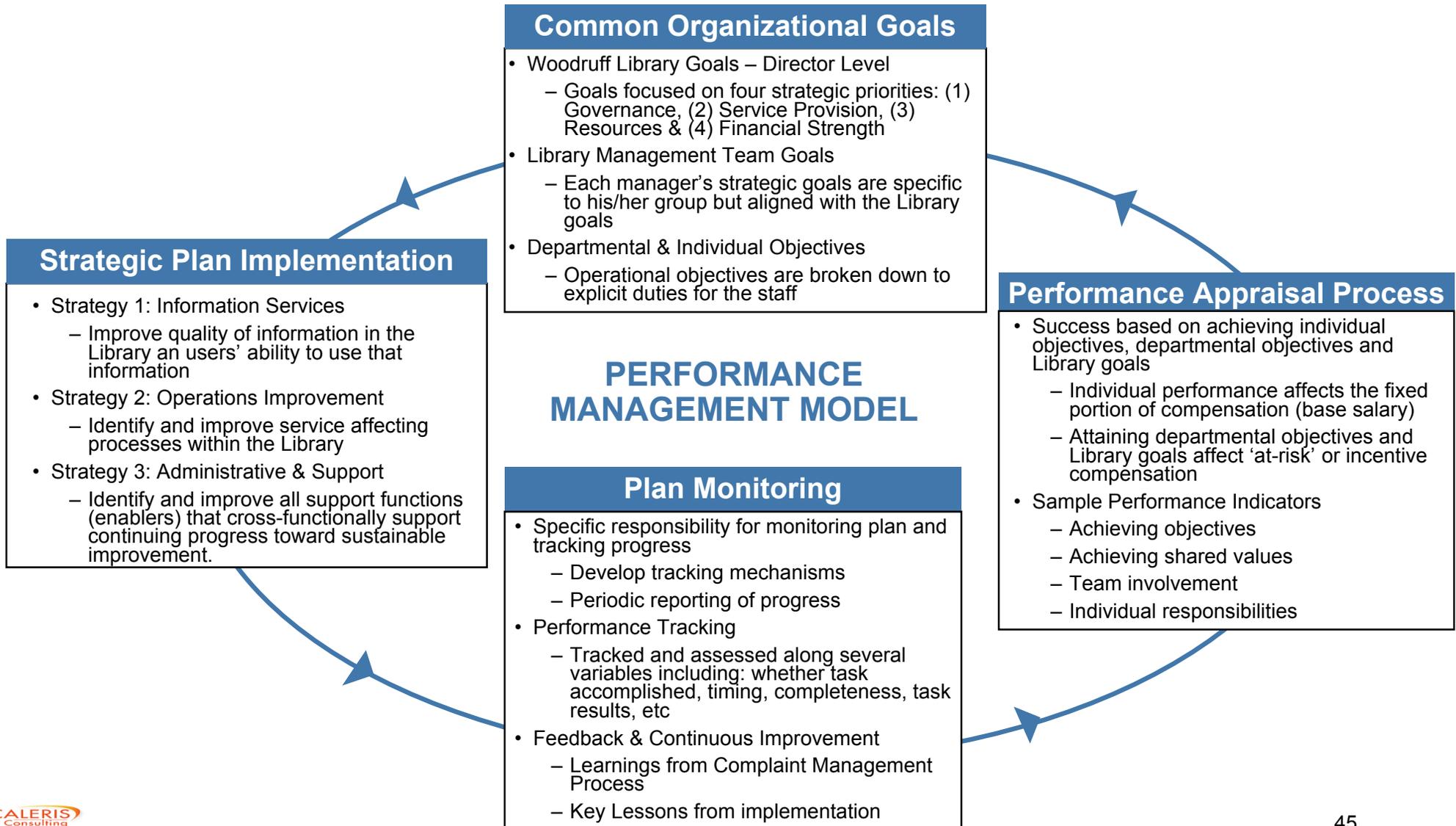
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Administrative & Support Strategy Woodruff Human Resource Gap Analysis

The Human Resources Gap Analysis clearly shows the deficiencies within the HR processes. The implementation workplan will address these deficiencies.

HR Components		Rating	Woodruff Performance
Human Resources	Recruiting, Hiring & Employment	○	<ul style="list-style-type: none"> • Current recruiting and hiring practices do not satisfy hiring managers' needs as related to skill level and speed of hiring. • A general lack of understanding exists through the Library about hiring practices and criteria. • Retention efforts are not used to keep desirable staff members.
	Employee Benefits	◐	<ul style="list-style-type: none"> • Woodruff has strong benefits for its employees. • Employee knowledge and understanding of benefits needs some improvement through first-hand communications. • Benefits are not being used effectively as a tool for recruiting and retention.
	Employee Relations	○	<ul style="list-style-type: none"> • Many interpersonal issues exist between staff members. • There is no mechanism in place today to deal with interpersonal issues. • Staff members desire a way to solve these issues.
	Staff Development	◐	<ul style="list-style-type: none"> • While there are occasional training workshops, there is a lack of formal management and staff development programs and training. • Professional staff's development is determined by department heads and applied unevenly. • Non-professional staffs' development needs are not being addressed.
	Pay for Performance	○	<ul style="list-style-type: none"> • Currently, Woodruff has an ineffective performance evaluation system. • Goals and objectives are not clear. • The success of the Library is not tied to the performance of the staff. • Merit and incentive pay are not used to motivate staff performance.
<ul style="list-style-type: none"> ● Indicates performance equal to First Choice Vision ◐ Indicates some improvement required to match First Choice Vision ○ Indicates significant improvement required to match First Choice Vision 			Relative to First Choice Vision <div style="float: right; text-align: right;">○</div>

A robust Performance Management System creates and uses incentives and metrics which support the overall Library strategy and ensures commitment by employees.



Strategy 3 addresses all of the support areas that cut across the entire Library. The tasks identified below aid in enabling the improvements and Library transition.

Administrative & Support Strategy	Identify and improve all support functions (enablers) that cross-functionally support continuing progress toward sustainable improvement.	
Key Activity 2	Address Key Human Resources and Staffing Issues	
Major Tasks	Purpose	Outcome
A. Improve Library’s Staffing of Key Public Service Areas.	To provide appropriate staffing levels and skill sets for key service points.	Consistent, professionally delivered service across all public service interaction points.
B. Develop a Library Performance Management System.	To provide a systematic methodology to ensure staff performance is consistent with strategic plan needs and expectations.	Library has a functional system in place to support and encourage staff’s success in accomplishing Library goals and objectives.
C. Communicate Key HR Processes and Functions.	To develop and communicate Library hiring processes, benefits packages and employee relations programs.	Well-informed staff on the key HR processes that most affect them.

Administrative & Support Strategy Work Plan HR/Staffing

Human Resource issues related to service delivery are addressed and communicated to staff.

Administrative & Support Strategy		Identify and improve all support functions (enablers) that cross-functionally support continuing progress toward sustainable improvement.		
Key Activity 2: Address Key Human Resources & Staffing Issues				
Major Tasks	Detailed Improvement Steps	Responsible Party	Resources Required	Measurements/Metrics
Improve Library's Public Service Area	<ul style="list-style-type: none"> Assess how many public service points are needed Determine criteria for assessing staff needed and skill level desired Develop skills assessment Record the current number of staff in each public service area <ul style="list-style-type: none"> Circulation, Reference, Gov Doc, Serials, CMC, Archives & Special Collections, ILL, Dow Jones, Theology, Security, Shuttle Services and Computer Labs Perform a skills assessment for each staff member Determine whether staff meets criteria for each department Reallocate staff based on results of assessment Ensure consistent coverage for weekday evenings and weekends by matching numbers and skill set commensurate with users in the Library 	<ul style="list-style-type: none"> C. Hart J. Troutman 	<ul style="list-style-type: none"> Staff time 	<ul style="list-style-type: none"> Reallocation Skills Matrix
Develop a Library Performance Management System	<ul style="list-style-type: none"> Revamp performance evaluation process <ul style="list-style-type: none"> Establish organizational and individual goals and objectives Develop performance rating standards Tie goals and objectives to performance Revise and establish compensation and promotion guidelines based on performance Develop rewards and recognition programs Include shared accountability and interpersonal issues 	A. Clarke	<ul style="list-style-type: none"> Consultant 	Performance metrics as defined by Library
Communicate Key HR Processes and Functions	<ul style="list-style-type: none"> Communicate HR functions during employee gatherings such as brown bag lunches or staff meetings, including <ul style="list-style-type: none"> Benefits, hiring guidelines including justification for hiring, merit pay system Advertise salary ranges in hiring process 	A. Clarke	<ul style="list-style-type: none"> Meeting time Written explanations and orientation packets 	<ul style="list-style-type: none"> Participation

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Strategy 3 addresses all of the support areas that cut across the entire Library. The tasks identified below aid in enabling the improvements and Library transition.

Administrative & Support Strategy	Identify and improve all support functions (enablers) that cross-functionally support continuing progress toward sustainable improvement.	
Key Activity 3	Update and Develop Key Service-Affecting Policies and Procedures	
Major Tasks	Purpose	Outcome
A. Update Security Policies and Procedures.	To develop a standardized manual on security policies and procedures.	Consistent, professionally delivered service in all security interactions and functions.
B. Determine Most Effective Hours of Operations & Standardize Opening and Closing Hours.	To match the needs of users with the most appropriate hours of operations.	Well publicized hours of operations that meet the needs of all the member institutions.
C. Develop a Complaint Management Process.	To develop a process that captures complaints and responds to them in a satisfactory manner for users, while improving Library service.	A complaint management process that greatly contributes to a learning organization that uses complaints as intelligence to improve.
D. Compose Policy & Procedures for Handling Email Requests	To provide a process for receiving and responding to email requests in a timely manner.	The use of email requests as a fully functioning communications tool for the Library.

Administrative & Support Strategy Work Plan Policies & Procedures

This key activity addresses the most critical service affecting policies and procedures.

Administrative & Support Strategy		Identify and improve all support functions (enablers) that cross-functionally support continuing progress toward sustainable improvement.		
Key Activity 3: Update and Develop Key Service Affecting Policies & Procedures				
Major Tasks	Detailed Improvement Steps and/or Stated Policy	Responsible Party	Implementation Requirements	Measurements / Metrics
Develop a Uniform Security Policies and Procedures Manual	<ul style="list-style-type: none"> • Review security manual • Update outdated policies and procedures, i.e., entrances and exits, parking lot and patrols. • Provide briefing workshops to officers on updated security policies and procedures • Specific topics to address include: cell phone usage, quiet policy, opening and closing times, entrances & exits, parking lot, etc. 	<ul style="list-style-type: none"> • E. Miller • A. Clark 	<ul style="list-style-type: none"> • Officer Training • Manual Distribution 	<ul style="list-style-type: none"> • Reallocation • Skills Matrix
Standardize Opening and Closing for All Departments In Library	<p><u>Library Opening</u></p> <ul style="list-style-type: none"> • All departments open at the stated time of Library opening unless otherwise agreed. <p><u>Library Closing</u></p> <ul style="list-style-type: none"> • All departments close at the stated time of Library closing unless otherwise agreed. 	<ul style="list-style-type: none"> • LMT 	<ul style="list-style-type: none"> • Communication to all departments • Posted hours for exception departments 	<ul style="list-style-type: none"> • Communication to all departments • Posted hours for exception departments

Administrative & Support Strategy Work Plan Policies & Procedures

This key activity addresses the most critical service affecting policies and procedures.

Administrative & Support Strategy		Identify and improve all support functions (enablers) that cross-functionally support continuing progress toward sustainable improvement.		
Key Activity 3: Update and Develop Key Service Affecting Policies & Procedures				
Major Tasks	Detailed Improvement Steps and/or Stated Policy	Responsible Party	Implementation Requirements	Measurements/Metrics
Determine Most Appropriate Hours of Operation	<ul style="list-style-type: none"> • Develop questions to be answered to determine the most appropriate hours of operation • Establish focus group comprised of stakeholders to best determine hours (consider online survey for greater participation) • Specifically request comments about weekend and reading period hours • Determine alternative operating hours, utilizing present number of hours • Post hours at entrance and on Web 	<ul style="list-style-type: none"> • Library Director • LMT 	<ul style="list-style-type: none"> • Potential need for more personnel hours 	Increased usage during new hours
Develop a Complaint Management Process	<ul style="list-style-type: none"> • Service delivery complaints shall be submitted to a comment box at the Circulation desk. • Complaints shall be collected daily and reviewed by a central clearing house—a specifically designated person from IRS (perhaps the department head) • Review individual complaints. Log in complaints using structured method developed by the designated person • Send to the appropriate department/person for review, analysis and to determine a course of action. • Approval is sought by committee or designated person before implementation begins. • Communicate resolution to appropriate department/complainant/ • Maintain monthly complaint report. • Determine procedure for sharing complaint information with LMT. • In-house concerns about staff (personnel issue) go directly to HR to process. • See suggestion/comment form in Appendix 	<ul style="list-style-type: none"> • C. Hart 	<ul style="list-style-type: none"> • Meeting time • Written explanations and orientation packets 	Participation

This key activity addresses the most critical service affecting policies and procedures.

Administrative & Support Strategy		Identify and improve all support functions (enablers) that cross-functionally support continuing progress toward sustainable improvement.		
Key Activity 3: Update and Develop Key Service Affecting Policies & Procedures				
Major Tasks	Detailed Improvement Steps and/or Stated Policy	Responsible Party	Implementation Requirements	Measurements/Metrics
Compose Policies and Procedures for Responding to Email Requests	<ul style="list-style-type: none"> • Institute policy for handling email requests. • Require all staff to check e-mail regularly: A.M. and P.M. • Provide training on effective use of this method of communication that address skill-gaps. • Each department to establish dedicated e-mail workstation. • E-mail response time will be twenty-four hours or less. 	<ul style="list-style-type: none"> • LMT 	<ul style="list-style-type: none"> • Computer available for checking email • Person assigned to check email 	<ul style="list-style-type: none"> • # of email responses • Timeliness of email responses

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The website component of Strategy 3 focuses on the improvement of the Library website as a key enabler to access electronic Library information.

Administrative & Support Strategy	Identify and improve all support functions (enablers) that cross-functionally support continuing progress toward sustainable improvement.	
Key Activity 4	Improve Website Content and User Accessibility	
Major Tasks	Purpose	Outcome
A. Utilize Website Assessment as a Guide to Improve Website.	To provide a roadmap to improving the Library website making it fully functional and relevant.	A Library website that is users first choice for accessing information electronically.
B. Provide Process for Submitting and Maintaining Content.	To provide a systematic way to submit and update web content.	Relevant, up-to-date web content for each Library department and stakeholder group.
C. Provide Remote Access to Library Resources and Services.	To allow remote users to access electronic Library resources from anywhere.	Users have the ability and know how to access electronic Library materials from anywhere at any time.

Administrative & Support Strategy Work Plan Website

The Library’s presence on the web will be addressed in the website assessment.

Administrative & Support Strategy	Identify and improve all support functions (enablers) that cross-functionally support continuing progress toward sustainable improvement.			
Key Activity 4: Improve Website Content and User Accessibility				
Major Tasks	Detailed Improvement Steps	Responsible Party	Resources Required	Measurements/Metrics
Utilize Website Assessment to Improve Website	<ul style="list-style-type: none"> Review website assessment Determine which recommendations will be implemented Determine which recommendations to be accomplished in-house Determine which recommendations to be accomplished external resources/consultant Identify and hire consultant/web developer 	<ul style="list-style-type: none"> Library Director Robert Fallen LMT 	<ul style="list-style-type: none"> Consultant budget IT staff with web development skill to maintain newly revised site Written web policy and procedures 	<ul style="list-style-type: none"> Usability studies Web log statistics User feedback
Provide Process for Submitting and Maintaining Content	<ul style="list-style-type: none"> Draft guidelines for submitting content to web Develop template for submitting content Develop automatic notification process for content update status Identify staff responsible for providing specific content 	<ul style="list-style-type: none"> Robert Fallen LMT 	<ul style="list-style-type: none"> Written policy for adding and updating content 	<ul style="list-style-type: none"> Usability Studies User feedback
Provide Remote Access to Library Resources and Services	<ul style="list-style-type: none"> Develop policy for proxy users Develop patron database of users Develop systematic process for updating patron database Develop list of databases to be accessed with licensing agreements Develop process to register and license e-journals and databases for remote access Test and trial user authentication Establish notification process for cancellation, name change, link change, or licensing status change for e-journals and databases 	<ul style="list-style-type: none"> Robert Fallen Dan Veach 	<ul style="list-style-type: none"> Consultant budget Written Policy for proxy access 	<ul style="list-style-type: none"> Web Log Statistics User feedback

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Strategy 3 addresses all of the support areas that cut across the entire Library. The tasks identified below aid in enabling the improvements and Library transition.

Administrative & Support Strategy	Identify and improve all support functions (enablers) that cross-functionally support continuing progress toward sustainable improvement.	
Key Activity 5	Improve Marketing and Communications About the Library	
Major Tasks	Purpose	Outcome
A. Promote Library Services to Faculty and Students.	To develop a standardized manual on security policies and procedures.	Consistent, professionally delivered service in all security interactions and functions.
B. Improve Signage in Library.	To match the needs of users with the most appropriate hours of operations.	Well publicized hours of operations that meet the needs of all the member institutions.
C. Communicate Library Services Within the Library & Implement Feedback.	To develop a process that captures complaints and responds to them in a satisfactory manner for users, while improving Library service.	A complaint handling process that greatly contributes to a learning organization that uses complaints as intelligence to improve.

Administrative & Support Strategy Work Plan *Marketing & Communications*

Many of the communications improvements will be detailed in the Communications Plan.

Administrative & Support Strategy	Identify and improve all support functions (enablers) that cross-functionally support continuing progress toward sustainable improvement.			
Key Activity 5: Improve Communications and Marketing of the Library				
Major Tasks	Detailed Improvement Steps	Responsible Party	Resources Required	Measurements/ Metrics
Promote Library Services to Faculty and Students	<ul style="list-style-type: none"> • Develop information on library services in print and electronic formats (i.e. brochure, webpage) • Develop brochures for library departments that offer services to users • Developing branding to market library • Collaborate with AUC schools admissions and freshman orientation to market library to students (schedule tours, info packets, other activities) • Develop and place articles and ads regularly in student newspapers and AUC Digest • Purchase promotional items to give away to market library to students • Explore feasibility of using student email address to send periodic messages to students about library services and events • Consider republishing library’s newsletter. (Form newsletter committee) • Increase the number of Library sponsored programs • Determine which Library departments that can be specifically marketed and promoted to drive Library usage, i.e., Archives and Special Collections and Dow Jones 	<ul style="list-style-type: none"> • LMT • C. Hart • Outreach Librarian • Strickland 	<ul style="list-style-type: none"> • Brochure and collateral development • Written articles • Communications lead 	<ul style="list-style-type: none"> • Number of hits on webpage • Library included in orientation activities at every AUC school • Library articles and ads placed in campus newspapers

Administrative & Support Strategy Work Plan *Marketing & Communications*

Many of the communications improvements will be detailed in the Communications Plan.

Administrative & Support Strategy	Identify and improve all support functions (enablers) that cross-functionally support continuing progress toward sustainable improvement.			
Key Activity 5: Improve Communications and Marketing of the Library				
Major Tasks	Detailed Improvement Steps	Responsible Party	Resources Required	Measurements/Metrics
Improve Signage in the Library	<ul style="list-style-type: none"> Establish Policy & Procedures that governs developing, posting, and maintaining signs in the library Review existing signage Develop signage plan that outlines needed signs and expired signs Incorporate Library’s new branding image (colors/logo) into signage plan Contract with vendor to complete signage work Remove unnecessary signs Create new signs via signage vendor Maintain signage 	<ul style="list-style-type: none"> Signage committee LMT Building maintenance 	<ul style="list-style-type: none"> Signage budget Signage vendor Written policies and procedures 	<ul style="list-style-type: none"> Decrease in directional and informational questions at front desks
Communicate Library Services Within the Library and Implement Feedback	<ul style="list-style-type: none"> Develop a definite procedure to notify all library staff of new services and changes in service through memos, website and briefings. Keep public service staff informed of training classes, tours and other activities scheduled through a daily events calendar. Ensure new service training includes input from public service departments Prepare and share “How To Use” handouts for each department as service aids. Capture feedback from users on desired services and effectiveness of current services Encourage users to write comments and suggestions for the complaint box. 	LMT	<ul style="list-style-type: none"> Training agenda Intranet for internal communications Daily events calendar 	<ul style="list-style-type: none"> New services briefings

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The final section addresses selected next steps for the Library including the implementation schedule.

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Executive Summary Implementation Schedule

Many of the activities in first two strategies are scheduled for completion during the summer before the fall semester commences.

Activities & Tasks	Timing	
	Start	Completion
Strategy 1: Improve Quality of Information in the Library and Patrons' Ability to Use That Information.		
<i>Strengthen Linkage Between the Library and Faculty</i>		
Establish Subject Specialist-Faculty partnership to better understand curricular needs	Jun-04	Aug-04
A. Establish a more effective collection development policy	Jun-04	Aug-04
C. Establish student and faculty orientation plan	Jun-04	Aug-04
Strategy 2: Identify and Improve Most Critical Service Processes		
<i>1. Improve Most Critical Areas of Library Security</i>		
Enhance security around the perimeter of the Library and between the Library and member institutions	Jun-04	Sep-04
B. Secure Library entrances and exits	Jun-04	Aug-04
C. Better manage the parking spaces in the parking lot	Jun-04	Sep-04
D. Improve the monitoring and security in the parking lot	Jun-04	Sep-04
<i>2. Make Operational Improvements in Selected Library Departments</i>		
A. Ensure reserve items are available for patrons in a timely manner	Jun-04	Sep-04
B. Ensure that archives and special collections are processed and cataloged	Jun-04	Dec-04
C. Update the electronic operations of the Interlibrary loan process	Jun-04	Sep-04
D. Ensure that Library collections are catalogued and shelved appropriately	Jun-04	Sep-04
E. Manage training labs more effectively	Jun-04	Dec-04
F. Improve the handling of incoming phone calls	Jun-04	Aug-04
<i>3. Improve Utilization of Library Space</i>		
A. Develop a space utilization plan for the Library	Sep-04	Apr-05
B. Improve study space for group and individual study	Jul-04	Apr-05
C. Ensure that copy machines are adequate to meet the needs of users	Jul-04	Apr-05
D. Provide an improved audio/visual facility for multimedia collections	Aug-04	Apr-05
E. Enhance the appearance of the parking lot	Jul-04	Aug-04

Executive Summary Implementation Schedule

The remainder of the activities in the third strategy begin immediately and are ongoing in nature such as training and marketing. The completion of all these activities will represent a significant service improvement for Woodruff.

Activities & Tasks	Timing	
	Start	Completion
Strategy 3: Identify and Improve All Support Functions (Enablers) That Cross-Functionally Support Continuing Progress Toward Sustainable Improvement.		
<i>1. Meet Internal and External Training Needs</i>		
A. Provide basic orientation to Library staff	Jun-04	Apr-05
B. Provide customized training for subject specialists	Jun-04	Aug-04
C. Provide customized training for frontline employees	Jun-04	Apr-05
D. Provide functional training for staff	Jun-04	Apr-05
<i>2. Address Key Human Resources and Staffing Issues</i>		
A. Improve Library's public service areas	Jun-04	Sep-04
B. Develop a Library Performance Management System	Jun-04	Sep-04
C. Communicate key HR processes and functions	Jun-04	Sep-04
<i>3. Update and Develop Key Service Policies and Procedures</i>		
A. Update security policies and procedures	Jun-04	Jul-04
Determine most effective hours of operations and standardize opening and closing		
B. hours	Jul-04	Aug-04
C. Develop a Complaint Management Process		Process Completed
D. Draft policy on handling email requests		Process Completed
<i>4. Improve Website Content and User Accessibility</i>		
A. Utilize website assessment as a guide to improve website	Jun-04	Nov-04
B. Provide process for submitting and maintaining content	Jun-04	Sep-04
C. Provide remote access to Library resources and services	Jun-04	Sep-04
<i>5. Improve Marketing and Communications About the Library</i>		
A. Promote Library services to faculty and students	Jun-04	Apr-05
B. Improve signage in Library	Jun-04	Aug-04
C. Communicate Library services within the library and implement feedback	Jun-04	Apr-05

Next Steps

The team has identified several areas where the Library could use some outside assistance in completing the implementation.

- Managing the Implementation Plan
- Collection Development Policy
- Subject Specialist Training
- Leadership Training
 - Guiding Principles
 - Barriers to Success
 - Shared Accountability
 - Interpersonal Issues Management
- Website Implementation
- Human Resource/Staffing
 - Performance Management System
 - Public Service Area Staffing Assessment
- Service Training
- Technology Planning

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6.6	Website Assessment	

Appendix Training Agenda

The Training Agenda outlines the specific areas of training needed and the recipients, timing and resources. This Plan supports the implementation of training across the Library.

Training Agenda

Type Training	Topic	Who Receives	Delivered By	Timeline	Resources
General Basic Orientation	<ul style="list-style-type: none"> • Guiding principles • Library organization • Benefits • HR policies/Procedures • Performance • Facilitated department overviews • General facility tour 	New staff	HR	Summer 2004	Training Outline
Library Orientation	<ul style="list-style-type: none"> • Department overviews • Guiding principles • Discussions on Library values and core beliefs & reinforcing behaviors 	All staff	<ul style="list-style-type: none"> • HR • LMT 	Summer 2004	Training Outline
New services & resources	<ul style="list-style-type: none"> • Databases • Online catalog • New telephone system • Voyager library system • Interactive distance learning equipment • Wireless service • Proxy server • Interlibrary loan management software 	All staff	<ul style="list-style-type: none"> • C. Hart/vendors • Voyager/Voyager team members • IT • ILL Librarian 	Summer 2004	Training Outline

Appendix Training Agenda

The Training Agenda outlines the specific areas of training needed and the recipients, timing and resources. This Plan supports the implementation of training across the Library.

Training Agenda

Type Training	Topic	Who Receives	Delivered By	Timeline	Resources
Customized Librarians	<ul style="list-style-type: none"> Assessing /understanding curricular needs Subject-area instruction delivery Collection development 	Subject specialists	<ul style="list-style-type: none"> Library scholar Collection development scholar 	Summer 2004	<ul style="list-style-type: none"> Training proposal/agenda Training \$\$ Back-up staff
Functional Training	<ul style="list-style-type: none"> Department-specific training 	Departments	Based on Department Head assessment and employee development needs	<ul style="list-style-type: none"> Summer 2004 Ongoing 	Training Budget
Frontline Staff	<ul style="list-style-type: none"> Customer service Cross-training Communications standards: <ul style="list-style-type: none"> Telephone etiquette Email standardization; response time Voice mail greetings 	Customer-interfacing employees	<ul style="list-style-type: none"> HR LMT 	Summer 2004	Training Outline

Appendix Training Agenda

The Training Agenda outlines the specific areas of training needed and the recipients, timing and resources. This Plan supports the implementation of training across the Library.

Training Agenda

Type Training	Topic	Who Receives	Delivered By	Timeline	Resources
<p><u>User</u> Library Users</p>	<ul style="list-style-type: none"> • Assignment-driven • General courses • Databases • New services 	<ul style="list-style-type: none"> • Students • Faculty 	<ul style="list-style-type: none"> • Subject specialists • Vendors 	Summer 2004	<ul style="list-style-type: none"> • Training template • Updated handouts • Account with local print vendor • Facilities to accommodate class size • AV system in Exhibition Hall • Large ceiling to floor screen in Exhibition Hall • Standalone podium • Wireless mikes • Training calendar • Artwork in Exhibition Hall • Budget to purchase and frame prints from AUC art museums for placement in Exhibition Hall
Leadership Training	<ul style="list-style-type: none"> • Guiding Principles • Shared Accountability • Interpersonal Issues Identification & Management 	<ul style="list-style-type: none"> • Library Management Team 	<ul style="list-style-type: none"> • Consultant 	Summer 2004	<ul style="list-style-type: none"> • Consultant budget • Implementation plan • Performance Management System

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Appendix Strategy 3 Policies and Procedures – Complaint Management Process

Comments & Suggestions Form



COMMENTS AND SUGGESTIONS FORM

NAME _____ DATE _____ TIME _____

If you wish to be contacted, please fill in additional information

E-MAIL _____ PHONE _____

AFFILIATION / DEPARTMENT _____

DATE AND TIME OF OCCURRENCE: _____

WHERE? : _____

COMMENT(S) OR SUGGESTION (S): _____

Multiple horizontal lines for writing comments and suggestions.

SIGNATURE _____

* It is our goal to respond within 3 to 5 days*

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Appendix Email Response Process

The Email Response Process has been completed.

Strategy 3	Identify and improve all support functions (enablers) that cross-functionally support continuing progress toward sustainable improvement.
Key Activity 3: Update and Develop Key Service Affecting Policies & Procedures	
Major Tasks	Detailed Improvement Steps and/or Stated Policy
Compose Policies and Procedures for Responding to Email Requests	<p>Guidelines for receipt and processing of incoming Email Goal: To receive and process incoming email inquiries with appropriate remedy, expeditiously</p> <p>Initiate Process</p> <ul style="list-style-type: none"> • A designee from circulation, reference, interlibrary loan and archives will access incoming email every two (2) hours during the course of each workday from opening through closing and implement the following actions per email inquiry. <p>Action(s) performed by designee:</p> <ul style="list-style-type: none"> • Secure “RECORD OF INQUIRY” (ROI) form, (used to chronologically verify action(s) taken to satisfy inquiry) located near each designated workstation within each department • Access email • Printout original email request • Record all pertinent information to include inquirer’s name, email address and inquiry on an ROI • Inquirer is emailed that inquiry was received and action will be undertaken with expediency • Staple original email inquiry to ROI • Identify appropriate staff who would execute remedy to inquiry (if it is another other than designee). Alert responsible individual in person, by telephone or in house email that an inquiry is forthcoming for action; instruct to process through action completed status. Note action, initial, date and hand off ROI • Appropriate staff person would complete the required action/response • An email notification of remedy, response or action will be sent to inquirer by responsible staff, including any instruction for open-ended response (where series of actions or referrals are necessary for inquiry remedy). In the case of open-ended response, the ROI would be rendered to ROI PENDING status and retained within department where action continues, inquirer remains current on status • Once all action is completed, inquirer is notified, reply of satisfaction is solicited, RECORD OF INQUIRY, initiated and dated as action completed • RECORD OF INQUIRY/original email will be filed within each department for access, statistics and follow-up, if necessary.

Appendix Email Response Process Form

Record of Inquiry for Email



LIBRARY SERVICE
RECORD OF INQUIRY FOR E -MAIL

DATE RECEIVED: _____
RECEIVED BY: _____

CHECK APPROPRIATE DEPARTMENT TO BE CONTACTED

__ REFERENCE __ CIRCULATION __ ARCHIVES & SPECIAL COLLECTION
__ INTER. LIB. LOAN __ CMC OTHER _____

NAME: _____
ADDRESS: _____
PHONE: _____ E -MAIL: _____

(PLEASE ATTACH EMAIL OR USE SPACE BELOW FOR INQUIRY)
***** INQUIRY *****

***** ACTION RECORD *****
(PLEASE INITIAL ALL ACTION TAKEN)

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Appendix Communications Plan Synopsis

Synopsis of Communications Plan

Second & Third Quarter's Key Communications Messages

- ⌘ Woodruff Library and faculty are forging a solid partnership to ensure the most relevant information is available in the Library
- ⌘ A coalition of College Police Chiefs working together to improve the security around the Library
- ⌘ Woodruff Library introduces direct shuttle service between the Library and College campuses
- ⌘ Mandatory Student & Faculty Orientations planned for the upcoming school semester
- ⌘ Woodruff readies the introduction of a new information portal as part of its website

STRATEGY	AUDIENCE	TIMELINE
<p>Continue Public Relations/Media Relations Initiative</p> <p><u>1. PSA Radio Announcement</u> : campus personalities or alumni extolling the virtues of using the Woodruff Library .</p> <p><u>2. AUC Digest Advertisement</u> : Weekly or bi-weekly placement of a Woodruff ad relating to the key messages and Library activities.</p>	<p>User-community, stakeholders (students, faculty, staff, administrators)</p> <p>Media: CAU Radio & AUC Digest Library website</p>	<p>Begins August 2004</p>
<p>Launch Promotions Campaign</p> <p>Hold 3 -4 activities per semester related to school cycle:</p> <ol style="list-style-type: none"> 1. Orientation - Welcome Back 2. September – Book Signing Event 3. Midterm & Finals – Study at the Stacks with Snacks 4. Order promotional giveaways once graphic identity is determined 	<p>User-community, stakeholders (students, faculty, staff, administrators)</p> <p>Media: AUC Digest, Library websites, flyers & posters</p>	<p>August – December</p>
<p>Launch Branding Campaign</p> <ol style="list-style-type: none"> 1. Finalize graphic identity: logo, colors, type style, etc. 2. Develop stationery (business cards & letterhead) and collateral (brochures) 3. Extend new branding to internal signage: directional, informational & policy 	<p>User-community, stakeholders (students, faculty, staff, administrators)</p>	<p>Begins June</p>
<p>Implement External/Internal Communications Program</p> <p>Internal newsletter</p> <p>Intranet communications for staff</p> <p>Website communications for external</p> <p>Website links resident on College web pages</p> <p>Develop email database for external messaging</p>	<p>User-community, stakeholders (students, faculty, staff, administrators); Board of Trustees, AUC leadership community</p>	<p>Begins June</p>

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Based on survey respondents and outside research, the Woodruff website should be an information portal where users can access not only Woodruff related information resources but also general web-related information resources users currently draw on for research.

Woodruff Website Strategy

Create an **Online Information Portal**
Focused on Making
Electronic Information
Resources Available to
Users

- In keeping true to the Library vision, the Library website can serve as a vehicle for users to make Woodruff their first choice for information
- By placing the various kinds of information access on the website, it can become the one-stop information hub for the AUC community. This must include information resource links like search engines, databases and other websites currently being used by the community for research.
- This will generate a change in attitude toward the website both internally and externally from a resource serving the internal needs of the Library to a resource serving the information needs of the users
- This will also require a re-launch of the website and the communication of such to the AUC community after the improvements have been made.

The high-level website recommendations are in four areas: content, management, architecture and technology.

• Content

- Focus the website on information resources such as Library databases and other resources that users have access to online such as search engines.
- Include links to most utilized search tools for web research, i.e., Google, Amazon, publication websites, Woodruff databases and catalogues, etc.
- Ensure electronic databases are easily searchable with a search capability for the entire site and linked components. (Requires cataloging intended electronic resources).
- Improve the integrity of the online catalogue such that it matches what is actually available in the Library.

• Management

- Institute Website council for policy decisions on website.
- Consider outsourcing the updating of content, links and server administration to a website provider.
- Institute internal content updating process.

• Architecture

- Organize site by stakeholders, i.e., students, faculty, staff, community, researchers, etc to make it easy for stakeholders to find items that most interest them.
- Ensure that are broken links are repaired and in good working order.
- Utilized direct links with minimal pop-up windows.
- More intuitive navigation and ease of use

• Technology

- Bring proxy server online for remote usage.
- Catalogue electronic databases to improve searching capability
- Improve website technology via outsourcing.

Users have a clear expectation and behavior of looking online for information to complete their research

- **The survey responses are a good representative indicator for website usage and attitudes.**
 - Undergraduate – 43%
 - Faculty – 33%
 - Staff – 13%
 - Graduate – 12%
- **The ability to do research online is critical to the way users do research. It is the overwhelming preferred method for starting research.**
 - 85% of respondents start their research online
 - Only 15% report starting their research offline
 - Furthermore, only 3% begin their research offline at Woodruff
- **The focus of the website content should be on research information and its availability and less on internal Library department information. This is consistent with the Information Services Strategy of improving the availability and access to information.**
 - 48% of website users search for information that is available in the Library
 - Other website usage is very fragmented: 12% for hours and location, 3% for Library policies, 4% for how to use the Library

Based on observation, usage and the survey, several access and branding items appear as issues.

- **Domain auctr.edu is not intuitive to users relative to its content or its position as a library. Domain name does not match name of website (RWL references)**
 - One-third of respondents are not familiar with Library website
 - 67% of respondents use the Library website and get to the website in various ways including using search engines

- **Database not easy to access**
 - Electronic databases and My Account require login information for each authentication entry – rather than one login for multiple entries. Some login is required for additional databases. There is no instruction set or area as to how to confirm or seek login for the various databases. This is key for use.

- **Domain is indexed by Google, Yahoo, MSN, AltaVista for the following Keywords – this is great for access, but identifies branding complexities and ultimately access issues.**
 - Atlanta University Library
 - Robert. W. Woodruff Library
 - AUC Library
 - Clark Atlanta Library
 - Spelman College Library
 - Morehouse College Library

Content is very important to respondents. The content should be the information users desire and should be easy to access.

- **Content must be user focused**

- Most users come to the site expecting library services, not information about the library and its services.
 - About 30% of the site is focused on providing users services;
 - 70% of the site is focused on providing information about the library services.
- The menus are not based on how people use the library. The menus are based on how the library organizes itself.

- **Content must be easy to find**

- An estimated 90% of all visitors of content sites use the search feature repeatedly. *This site is missing a search feature that's immediately available. Search is key for the use and reuse of a content site. Search was removed because it was not-functioning, but search should function.*
- There are no instructions, no site maps, no guidelines for how to best use this site as provided within this site. A site map was removed because it was not functioning. The user has no orientation to the site without an index, site map or search feature. The user is forced to navigate one way – the menu system.

Respondents identified many usability issues related to finding information and navigating the site.

- **Inconsistencies in presentation / content can be disorienting to the user:**
 - *Databases*
 - Different databases, therefore different content, but no common theme in presentation.
 - What's a database? Electronic v. Galileo – discrepancies in presentation of info.
 - *Navigation*
 - High-level Menus repeated as links in sub-categories of other menus
 - Other standards not represented here such as Home button in top left-hand corner
 - Sub-navigation not standard and therefore not as clear to the user.
 - Press Release on Home Page, but not others
 - Footer on others, but not Home page
 - *Content*
 - Some links launch applications in a new shell while others link to static pages
 - Library Hours v. Department Hours. Do most users know the difference?

The user's experience will determine whether the site remains one that he or she will continue to use. When many things on the site are not working the integrity of the site is called into question.

- **Integrity of site is significant for user trust and loyalty:**
 - Significant number of broken links. Greater issue is maintenance of links in a external linking environment.
 - Load time and refresh is choppy in between pages – should not have to reload each page when much of this info should be the same. Appears to the user as if there is an issue in connection or other technology.
 - Integrity of site is often associated with information or content organization. As noted above, there are some significant issues with organization of information relative to hierarchy of menus. Users expect the library to provide the standard as a solution to organization of information.