



10 September 2009

Demonstrating the Business Case for Libraries: Case Studies from PACCAR and MnDOT

Betsy Aldridge, PACCAR, Inc. & Sheila Hatchell, MnDOT

Transportation Roundtable

9/10/09

“Run Through the Jungle / Don’t Look Back”

(title of a Creedence Clearwater Revival song)

- Betsy Aldridge, Senior Research Specialist,
Library Team Lead

PACCAR Inc –Technical Library/Technical Center

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PACCAR Inc

- Primarily truck manufacturing, winches, parts, truck leasing ; 22k employees worldwide / 800 engineers/technical staff (core potential users)
- Subsidiaries:
 - DAF Trucks NV (Netherlands)
 - Leyland Trucks (UK)
 - Kenworth Trucks (US)
 - Peterbilt Motors Co. (US)
 - Winch
 - Dynacraft (hoses, etc.)
 - PACCAR Parts
 - PACCAR Leasing

Running > constantly improving/changing processes, resources

- What are our processes? Document for QMS & EMS (quality and environmental management systems / ISO 9000 /ISO14000)
- Physical refresh in 2006
- Barcode project – speed up checkout, inventory, reduce errors >Lean Six Sigma project >upgraded ILS > better interface, time & steps less for users and staff
- Internal monthly digest newsletter production too time-consuming > Lean Six Sigma Project

QMS/EMS processes

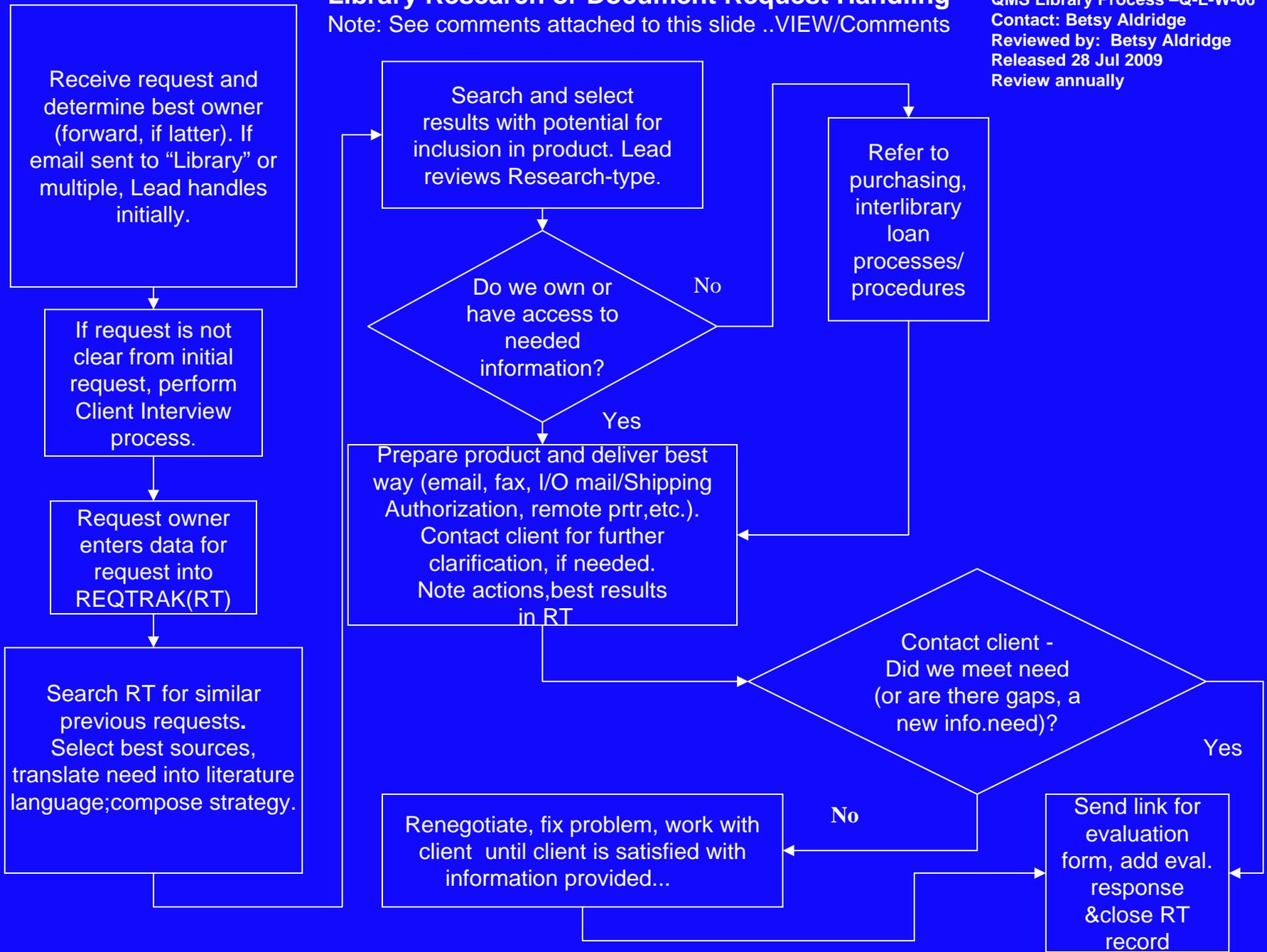
- Initial writing – 36 task notes, work instructions, manuals – reviews, trainings, audits (I've been an internal auditor)
- Customer satisfaction important > evaluation form for requests
 - time saved
 - money saved
 - contribution to revenue-generating activities, comments)
- Process change examples: Switch to online monthly digest newsletter meant “routing” QMS needed to change to “subscriber” ; Preferred Sources QMS changes ea.yr.

	A	B	C	D	E	F
3	Doc #	Class	Review Freq	Contact	Review By	Last Review Date
4	Q-L-M-01-Client Interview.doc	M	2 years	Betsy Aldridge	Betsy Aldridge	7/14/09
5	Q-L-M-02-LibraryProcess-PreferredSources.doc	M	annual	Betsy Aldridge	Betsy Aldridge	7/14/09
6	Q-L-M-04-ResearchRequestLibrarianNotes.doc	M	annual	Betsy Aldridge	Betsy Aldridge	7/14/09
7	Q-L-M-05-ResearchStrategyLibrarianNotes.doc	M	annual	Betsy Aldridge	Betsy Aldridge	7/14/09
8	Q-L-M-06-MS-LibraryProcess-ResourceEvaluation.doc	M	annual	Betsy Aldridge	Betsy Aldridge	7/14/09
9	Q-L-M-07-SubscriptionHandling.doc	M	2 years		Betsy Aldridge	7/16/09
10	Q-L-O-01-UseOfLibrByNon-PACCARIndividuals.doc	O	annual	Betsy Aldridge	Betsy Aldridge	7/14/09
11	Q-L-T-01-How to catalog web pages.doc	T	annual		Betsy Aldridge	7/14/09
12	Q-L-T-02-TechRefAlert Subscriber Information	T	annual		Betsy Aldridge	7/16/09
13	Q-L-T-09-DocumentConversion.doc	T	annual		Betsy Aldridge	7/15/09
14	Q-L-T-10-EbscoRenewal.doc	T	annual		Betsy Aldridge	7/16/09
15	Q-L-T-11-ElectronicDataArchiving.doc	T	annual		Betsy Aldridge	7/15/09
16	Q-L-T-12-InterfacingWithOCLCTechProServices.doc	T	2 years		Betsy Aldridge	7/15/09
17	Q-L-T-13-LibraryCheckout.doc	T	annual		Betsy Aldridge	7/15/09
18	Q-L-T-15-OCLC Record Download.doc	T	annual		Betsy Aldridge	7/15/09
19	Q-L-T-16-Periodical-MagLogin.ppt	T	annual		Betsy Aldridge	7/15/09
20	Q-L-T-18-RegsAlert.doc	T	annual	Betsy Aldridge	Betsy Aldridge	7/15/09
21	Q-L-T-19-TechRefAlertPublishing.doc	T	annual		Betsy Aldridge	7/15/09
22	Q-L-T-20-TechRefAlertContentSelection.doc	T	annual	Betsy Aldridge	Betsy Aldridge	7/15/09
23	Q-L-T-21-Thesaurus Management.doc	T	annual	Betsy Aldridge	Betsy Aldridge	7/15/09
24	Q-L-T-23-RecordsProcessSharepoint_archive.doc	T	annual		Betsy Aldridge	7/15/09
25	Q-L-T-24-CatalogingProc	T	annual	Betsy Aldridge	Betsy Aldridge	7/14/09
26	Q-L-T-25-Borrowertextbase	T	annual		Betsy Aldridge	7/15/09
27	Q-L-T-26-LibDonation	T	annual	Betsy Aldridge	Betsy Aldridge	7/15/09
28	Q-L-T-27-InterlibraryLoan	T	annual		Betsy Aldridge	7/15/09
29	Q-L-W-01-ClientSuggestionComplaint.ppt	W	annual	Betsy Aldridge	Betsy Aldridge	7/14/09
30	Q-L-W-02-Circulation.ppt	W	annual		Betsy Aldridge	7/14/09
31	Q-L-W-05-REQTRAKtextbase.ppt	W	annual	Betsy Aldridge	Betsy Aldridge	7/14/09
32	Q-L-W-06-RequestHandling.ppt	W	annual	Betsy Aldridge	Betsy Aldridge	7/28/09
33	Q-L-W-Doctracking.xls	W	annual	Betsy Aldridge	Betsy Aldridge	7/16/09

Library Research or Document Request Handling

Note: See comments attached to this slide ..VIEW/Comments

QMS Document Class: WorkInst
QMS Library Process –Q-L-W-06
Contact: Betsy Aldridge
Reviewed by: Betsy Aldridge
Released 28 Jul 2009
Review annually



Refresh of our Physical Library

- Catch attention at entrance
- More space for users – not so cramped
- Comfortable seating area > periodicals reading
- Neatness of 5S promoted > weeding, new desks facing customers; hide “mess” (we’re by entry)

Refresh (continued)

- Research workstation (database searching) > multiple uses + “learning center” & self checkout
- New digital clocks w/ red labels to match red chairs!
- Recent change to energy-efficient lighting
- Only latest 20 years of books upstairs > currency
 - Retain older books – still jewels within – ex. metals photos better in books than online

Reading area – photos courtesy of Bruce Knowlton, PACCAR Inc



Staff stations, Reference/Return desk



Barcodes, Self-checkout station

- RFIDs too unreliable, so stayed with barcodes
- Self checkout “station” like one we saw on tour of Microsoft Library— very basic form; no more handwriting!
- Setting people up for self-checkout provides opportunity to welcome, train > show sources on intranet and in library – F2F conversation

What is Lean Six Sigma?

- *Lean Six Sigma Statistics* by Alastair K. Muir, Ph.D. (2006, McGraw-Hill):

“Reduce the time it takes to deliver a defect-free product or service to the customer” (pg. 13)

- I've also heard
 - “improve processes, improve results”

R-DMAIC-S cycle

- Recognize change is needed
- Define the problem
- Measure the correct data correctly
- Analyze > how best to translate into statistics
- Improve with the best solution
- Control appropriately to maintain the gain
- Sustain by reporting, reviewing, integrating solutions into processes

Lean Six Sigma Project (continued)

Time improvement

Problem Statement –

Reduce time required to checkin from ____ secs to ____ secs/ item and checkout from ____ secs to ____ secs/ item

- Goal > average of 48% improvement for both
- Actual results > at least 49.5%
 - will get better with time as staff adjusts

“Library Materials Checkin/out Process Improvement” - Lean Six Sigma project

- Team >Library staff and Content Innovations
Natalie Munn as consultant
- Eliminated magazine checkout cards, duplicate entry of magazines in system
- Implemented updated ILS interface

OPAC homepage – nicer interface

Advanced Catalog Search - Microsoft Internet Explorer provided by PACCAR ITD

http://web-cs.techcenter.paccar.com/InmagicGenie/opac.aspx

File Edit View Favorites Tools Help

PACCAR Home BMW Augmented... TruckingInfo.com... Work Instruction... Advanced Ca... X

PACCAR Inc

Inmagic Genie: Catalog

Advanced Catalog Search

Any Word
AND

Title
AND Browse

Author
AND Browse

Subject
AND Browse

Record Type
AND Browse

Call Number
AND Browse

Publication Date
AND Browse

Submit Query Reset

0 item(s) in Cart

Advanced Catalog Search

 Search Tips

Use the **Browse** buttons to browse and select indexed terms and words.

Within search boxes, use & for AND, / for OR, ! for NOT, * for truncation, and : for ranges.

Find more detailed [Help](#) on how to search.



Local intranet 100%

Lean Six Sigma Project (continued)

- Saving staff & users time per year > cut in steps 46 to 22
- Overdue notices down from whole day to about 5 minutes!
- Quicker reserves process; automatically checks in, deletes reserves when checking out
- Multiple checkouts at once
- Transparency – user can see if something is checked out from within online catalog
- Serials records added to catalog; eventually MyGenie?

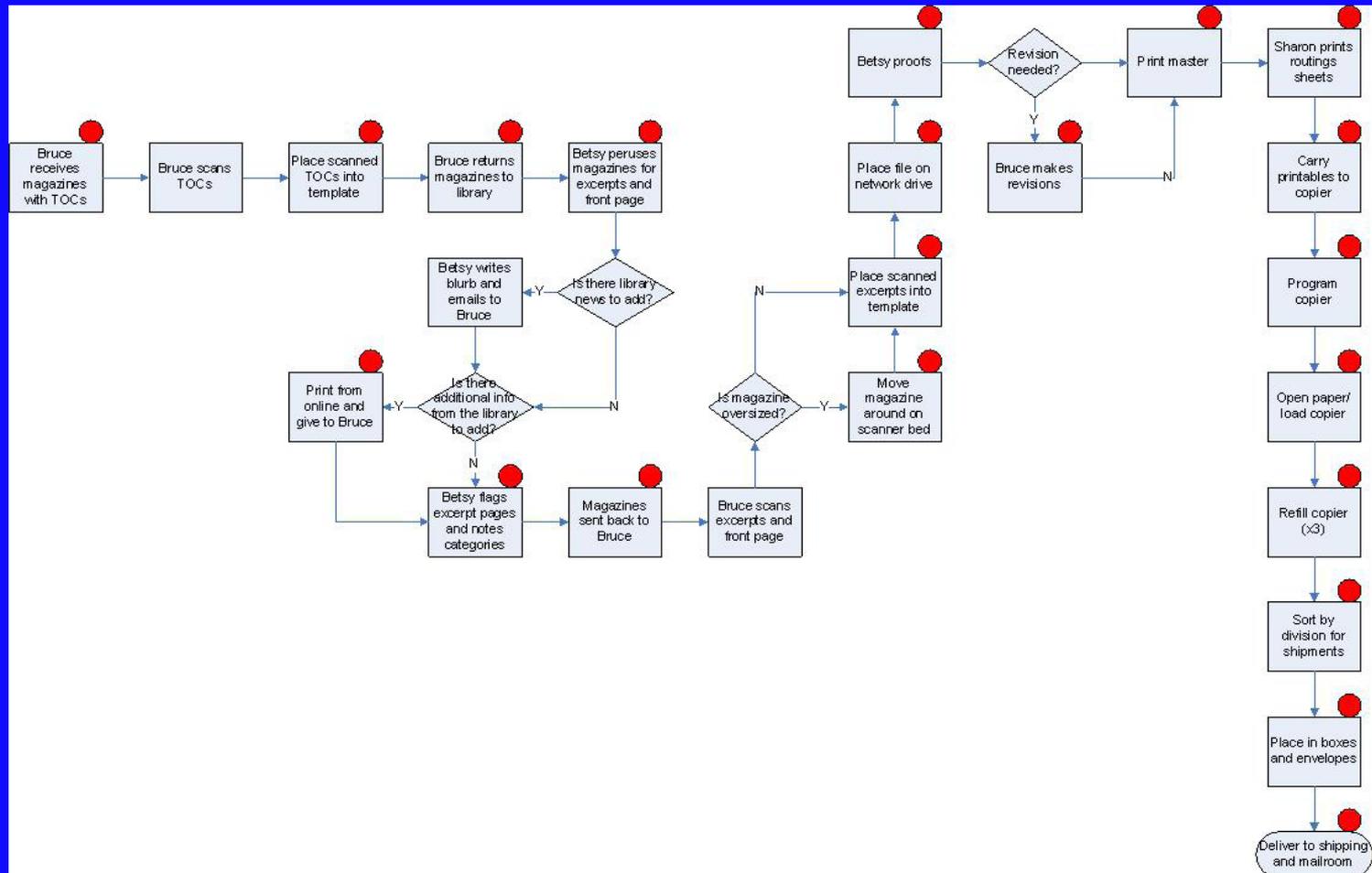
More pluses

- Database interfaces cut from 5 to 1
- Reporting/metrics - one place for Orders, interlibrary loan, loan statistics –quickly by division...
- Increase in checkouts > shopping cart feature – we did improve results!

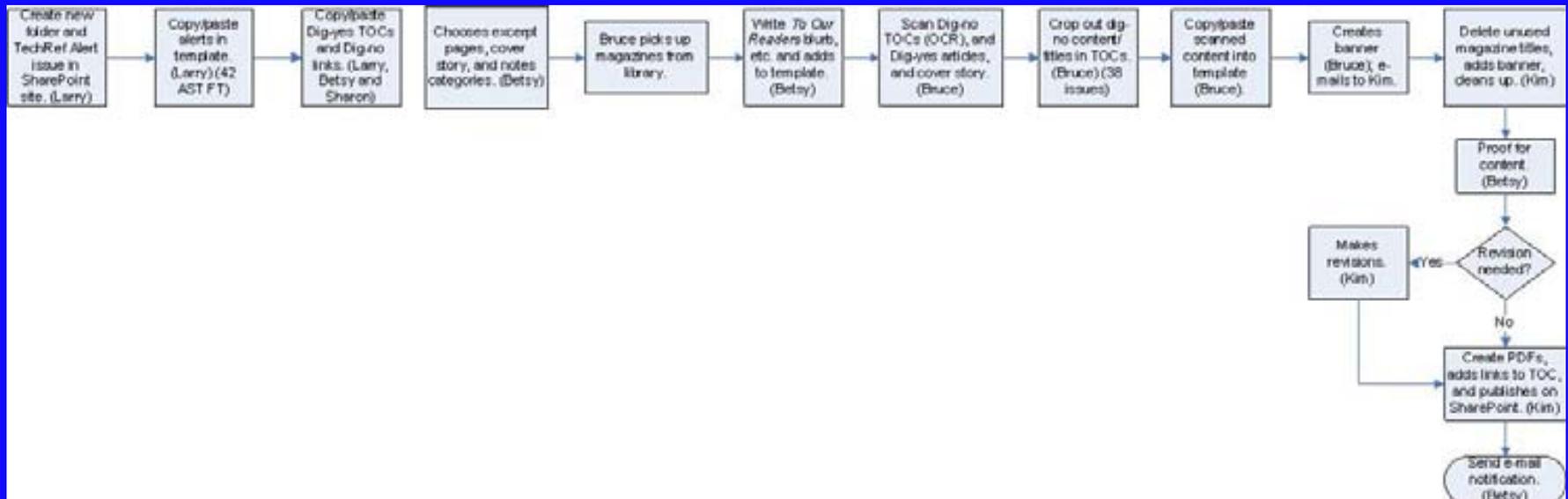
Monthly digest production - shifted to online newsletter

- Problem statement – reduce labor costs; also decrease steps, work areas, paper/shipping costs
- Time consuming > increased diligence about digital sharing permissions /CCC membership required + some emails to publishers, scanning, find/cut/paste tocs
- Add of online journal service w/ automatic toc alert service also crucial ; initial set-up time-consuming

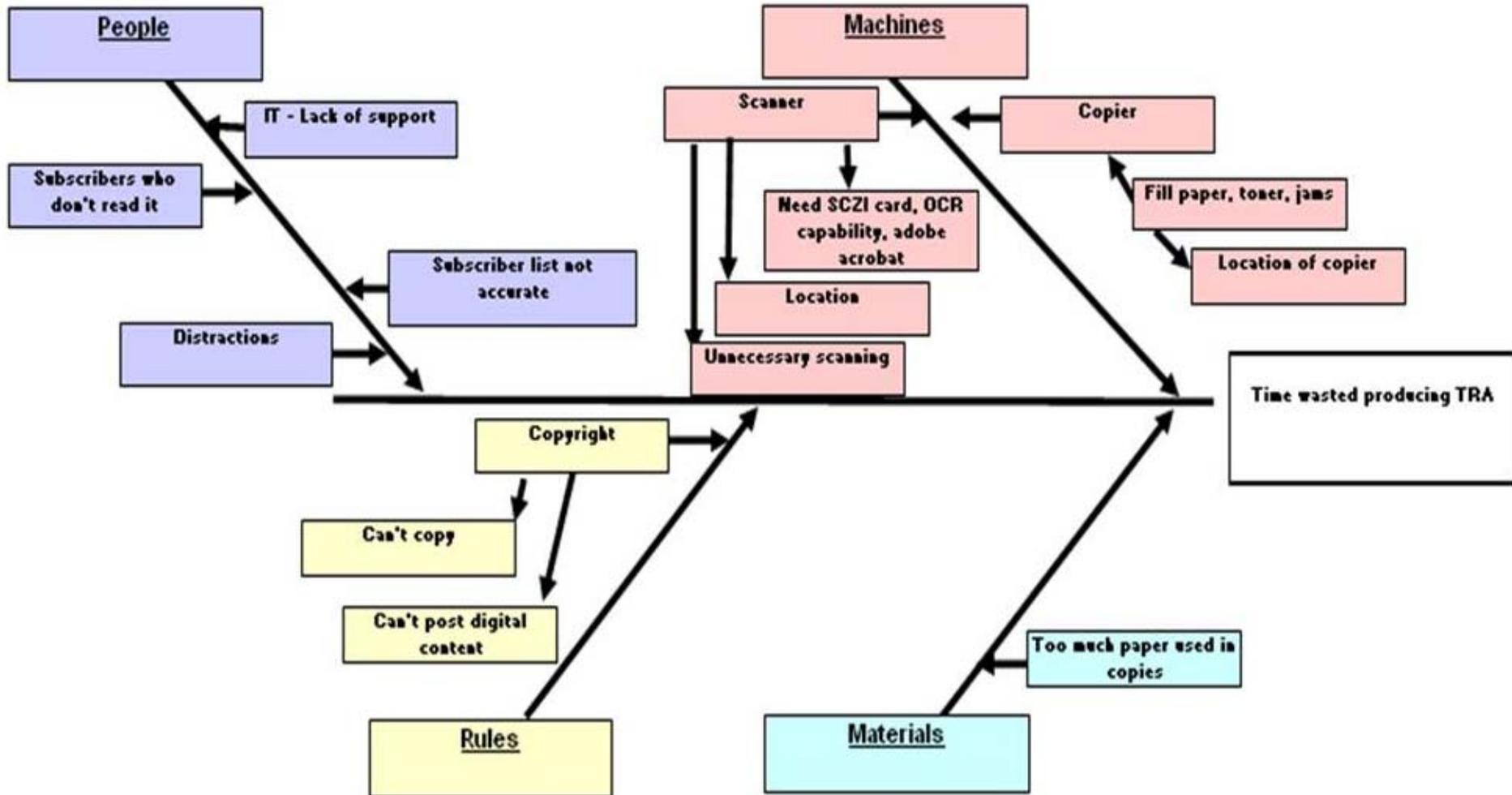
Process map before (illustrations by project manager, report author Kim Wickens)



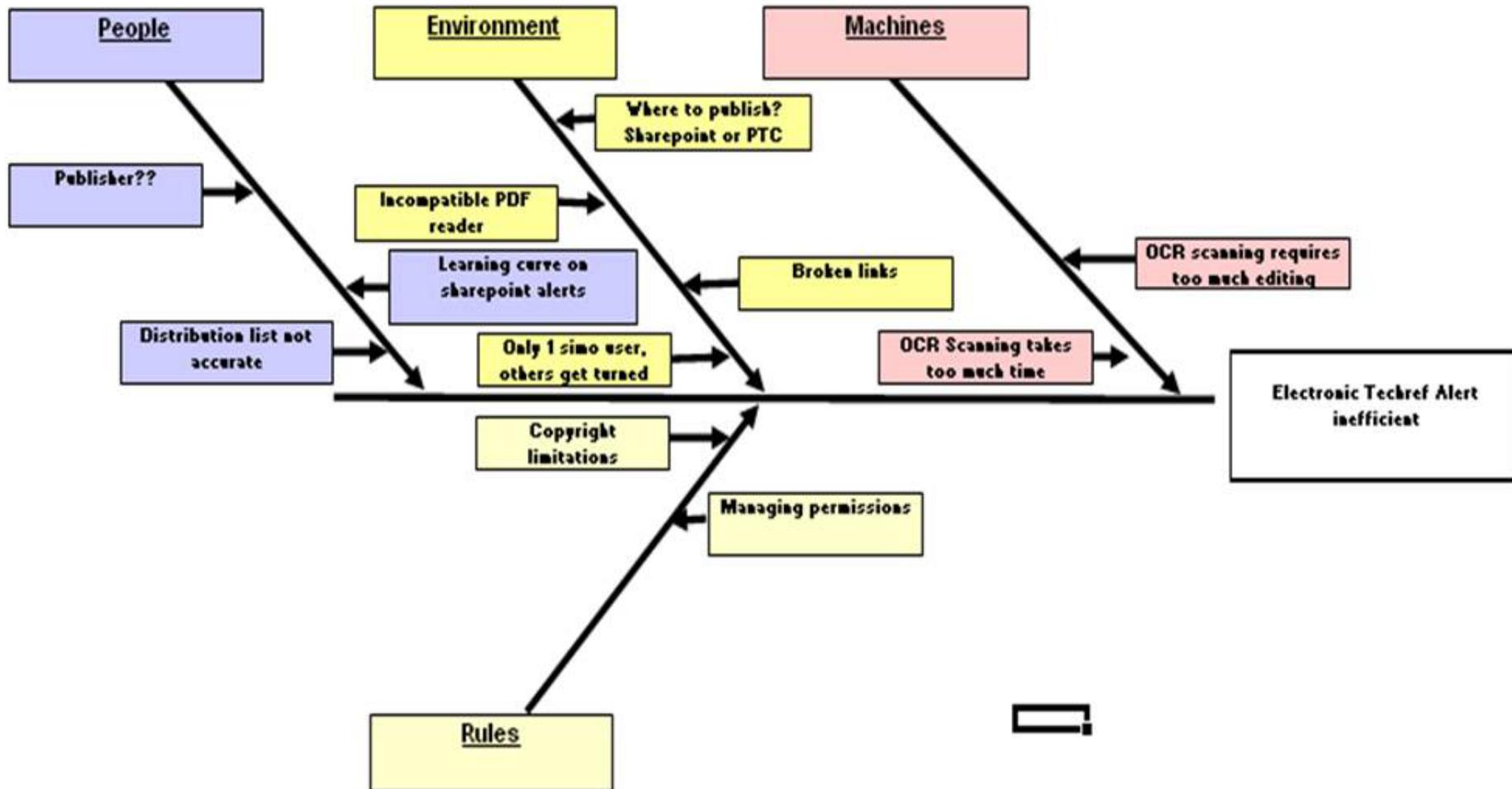
Process map after



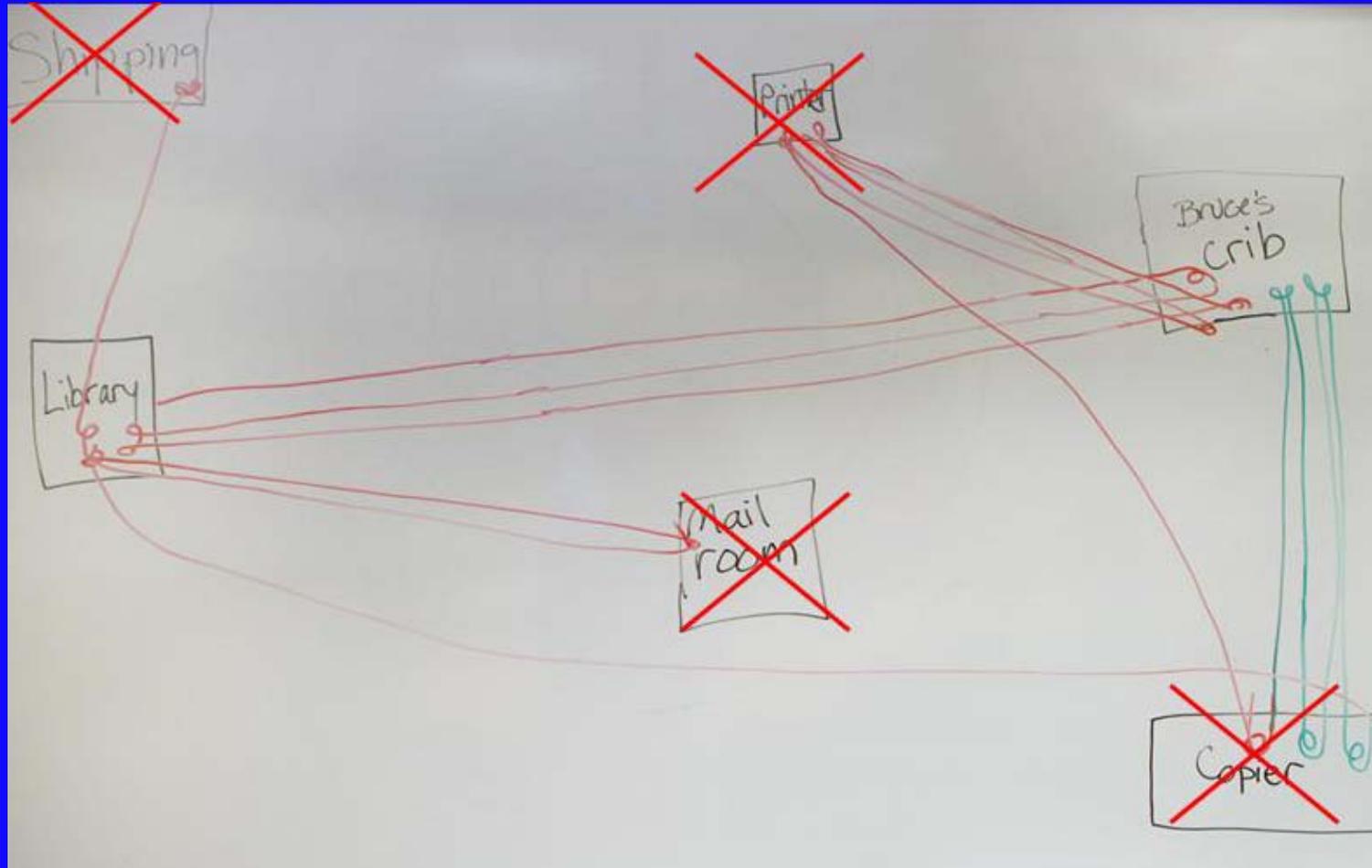
Fishbone diagram before



Fishbone after



Workflow diagram – now fewer work areas



Kickoff issue

(photo courtesy of Bruce Knowlton)

TechRefAlert_20090131 (Read-Only) - Microsoft Word

File Edit View Insert Format Tools Table Window Help

Type a question for help

100% Read Times New Roman 12 B U

Final Showing Markup Show



Contact: Betsy Aldridge betsy.aldridge@paccar.com PACCAR Technical Library 360-757-5234

Cover Story

NYC Parks and Recreation

NYC Parks **runs** a fleet of some **2,700** vehicles, which fall into some 40 different equipment categories, to clean, sweep, mow, prune and perform the myriad of other tasks required to maintain **29,000** acres of parks, playgrounds, playing fields, beaches, natural areas and, yes, street trees that grow in Brooklyn and the four other boroughs that make up the Big Apple

continued on page T-16

To our readers

WilsonWeb's Applied Science & Technology expands to provide Fulltext/PDF Technical Journal & Trade Magazine articles at your desktop:

1. Go to the Technical Center intranet homepage > Libraries/Tools > PACCAR Libraries Portal > External Digital Literature.
2. Click on Applied Science and Technology Fulltext (ASTF)

<http://vnweb.hwwilsonweb.com/hww/login.jhtml>

The license allows for one user at a time, company-wide, so please remember to logout (EXIT) when you've finished a session.

You can create automatic e-mail alerts to learn when new journal issues are released. Several interface languages are available besides English—Spanish, French, German, and so forth. For details, contact Betsy Aldridge, PACCAR Technical Library:

Page Sec | At Ln Col | REC TRK EXT OVR English (U.S)

Best of all

- Faster delivery of online content
- Simultaneous routing to all subscribers
- 100 % reduction in paper (supports EMS)
- 100 % reduction in shipping
- Now can count actual viewing via intranet statistics (leaves out uses when people print and share)

What Next?

- Need to come up with another lean six sigma project for 2010!
- One possibility:
 - improve users' searching (increasing # of instances when they successfully find what they're seeking in our databases)
 - How? Taxonomy/thesaurus improvement?

Don't Look Back > Embrace today's reality, Envision future possibilities

- Economic downturn > Everyone was asked to keep costs as low as possible for 2009
- Senn Delaney) / senndelaney.com
 - Stay inspired! Be a “high thriving” leader >
 - stable
 - secure
 - optimistic state of mind

Senn/Delaney

- Three critical psychological states of mind:
 - vitality
 - learning mindset
 - purpose and direction

Don't Look Back

Larry E. Senn's "Team at the Top" in Leadership Excellence, 6/1/05

6 Essential Values for effectiveness

for individuals, teams and organizations:

- *** Performance > results focus, personal accountability**
- *** Collaboration > cross-organizational teamwork, mutual support**
- *** Change > innovation, new ideas, coach**
- *** Ethics, integrity > model behavior daily.**
- *** Health > openness, trust, respect, hope, optimism.**
- *** Customer > focused on serving customers**

Don't Look Back (continued)

- Library actions so far > helpful decrease in receivables
- Require justification statement for library purchases
- Resource cuts; platform shifts> new resource adds
- Vendor relationships

Don't Look Back

- Library staffing flexibility
- Behind the scenes work
- Metrics > “Valuing Library Services Calculator”,
capacity

Justification statements

- Why need, how purchase will be used, value to PACCAR
- Helps to see impact of purchases – outcomes
- Examples: info. is used for
 - inspections in plants,
 - working with suppliers for high quality,
 - understanding phenomena, principles...for new products
 - how to improve material properties of metals

Staffing flexibility

- Encourage each other – keep morale up– humor, bravos
- Being back-up for each other > better communication, appreciation for what we all do
- Staff helps with administrative back-up > learn more about bigger picture
- Extra time off brings refreshes people –
 - strengthens social networks (family, friends)

Behind-the-scenes work

- Plenty to do with catalog/collection management, thesaurus maintenance
- Wish list for future improvements posted on Library's SP site
- Reclamation project & inventory >
 - OCLC holdings accurate for TLCat
 - open possibility of engineers finding items via Google

Some resources cuts, shifting platforms

- Retained sets most used per vendor usage stats.
- Dropped one experimental embedded linking service > why there's a slight drop in usage of one set?
- May shift platform for that one set to a lower- cost option > add more online journals, standards!

Continue to improve relationships with vendors - it pays off

- Keep % increases low
- Provide more content, seats for little extra cost (ex. – one call inquiring increased seats)
- Free trials, web trainings keep us fresh, knowledgeable (less funding for travel)
- Express thanks & remember in future years

Metrics - Valuing Library Services Calculator (numbers not real)

Retail Value Calculator - Microsoft Internet Explorer provided by PACCAR ITD

http://nmlm.gov/mcr/evaluation/calculator.html

File Edit View Favorites Tools Help

Catalog Report Retail Value Calculator

Library Annual Budget - you *must* enter your library's annual budget **without commas**

Number of months of stats you are using:

Number of Uses (do not use commas)	Library Resources or Services	Cost of Resource or Service	Value of Resources or Services
<input type="text" value="200"/>	Print and e-Books used (in house, checked out or online)	<input type="text" value="125"/>	\$ <input type="text" value="25000.00"/>
<input type="text" value="50"/>	Print journals used (in house or checked out)	<input type="text" value="35"/>	\$ <input type="text" value="1750.00"/>
<input type="text" value="500"/>	E-Journal articles accessed	<input type="text" value="35"/>	\$ <input type="text" value="17500.00"/>
<input type="text" value="10"/>	Document Delivery (Items borrowed for/delivered to users)	<input type="text" value="18"/>	\$ <input type="text" value="180.00"/>
<input type="text" value="60"/>	Reference questions Answered	<input type="text" value="45"/>	\$ <input type="text" value="2700.00"/>
<input type="text" value="20"/>	Mediated searches	<input type="text" value="75"/>	\$ <input type="text" value="1500.00"/>
<input type="text" value="8"/>	Class hours taught (Sum of students/class x hours/class)	<input type="text" value="30"/>	\$ <input type="text" value="240.00"/>
<input type="text" value="8"/>	AVs used or borrowed	<input type="text" value="150"/>	\$ <input type="text" value="1200.00"/>
<input type="text"/>	Self service photocopies	<input type="text" value=".10"/>	\$ <input type="text" value="0.00"/>
<input type="text"/>	Meeting room use	<input type="text" value="50"/>	\$ <input type="text" value="0.00"/>
<input type="text" value="2"/>	Hours of computer use (i.e. Internet, MS Word, etc.)	<input type="text" value="12"/>	\$ <input type="text" value="24.00"/>
<input type="text"/>	Add another service or resource	<input type="text"/>	\$ <input type="text" value="0.00"/>
<input type="text"/>	Add another service or resource	<input type="text"/>	\$ <input type="text" value="0.00"/>
<input type="text"/>	Add another service or resource	<input type="text"/>	\$ <input type="text" value="0.00"/>

Clear Form

Please answer the following question before you submit this form. (This step helps prevent automated programs from submitting erroneous data.)

3 + 6 =

Internet 100%

Permission granted for including previous slide from

- Barbara Jones, MLS
- Missouri/Library Advocacy Liaison
- J Otto Lottes Health Science Library
- University of Missouri
- Columbia, MO 65212
- 573-884-5042
- jonesbarb@health.missouri.edu

(If you use calculator, Barb would like to hear how it goes...)

Valuing Library Services Calculator ***<http://nnlm.gov/mcr/evaluation/calculator.html>***

- Adapting from health librarians' figures who adapted from Mass. Library Association
 - Our actual book costs not as high
 - Set extra categories (tech papers, abstract views, etc.)
- Referred to Hanford Technical, Linda Hall Libraries
- Managers like – speeds up “cost per use” calculations

Future – Staffing/workload Capacity charts

- How do we allocate our time on various activities (research, collection management, records management, internal report publishing..)?
- What is being put off because we only have so many hours, staff available?
- Predict expected workload, staff needs, time it will take staff to complete workload, etc.
- Do any of you keep this type of metric?

Future (continued)

- More premium content at the desktop
- More effective training of and marketing to users
integration into work processes is second nature
- Improve usability of intranet pages

Future (continued)

- Better thesaurus, catalog management
- Backlog decrease
- More on OCLC transparent via Google
- Continued cooperation, networking

Success is

- “...peace of mind
that is a direct result of self-satisfaction
on knowing you made the effort
to become the best
that you are capable of becoming.”
- -John Wooden, UCLA basketball coach who won
10 NCAA championships in 12 years, named
Coach of the Century by ESPN

***Thanks and Happy Trails
(or happy sails)!***





Mn/DOT Library's Business Plan

Transportation Librarians Roundtable
September 10, 2009



Background

- Change, Change, Change
 - Loss of 2 positions (July 2007)
 - Lack of resources to purchase library materials
 - Bridge collapse (Aug. 1, 2007)
 - 35-year library director retired (Dec. 14, 2007)
 - New library director begins (Dec. 17, 2007)
- 3 Months later – New:
 - Transportation Commissioner – Tom Sorel
 - Division - Policy, Safety & Strategic Initiatives
 - Office – Policy Analysis, Research & Innovation



New Office Director

- Nick Thompson accepts invitation to tour the library. He spends a morning at the library learning about
 - Staff
 - Collections
 - Current state of affairs
 - MTKN
 - Pooled Fund
 - NTL
 - Transportation Knowledge Networks



What is the future of the Mn/DOT Library?

- A business plan was needed to identify needs, goals, required resources



Business Plan Method

- Hired 2 consultants – retired Mn/DOT Research engineers who “understood” the library when in their former positions
- Developed a list of Questions
- Interviewed current and past staff, and a former Research engineer



Questions included

- Primary job responsibilities
- Who depends on these responsibilities
- What are your skills
- What skills need improving
- What tools do you need
- What are the major barriers to carrying out your responsibilities
- How do you know when your work is going well/poorly



Questions (cont.)

- What changes within the library might help you in your job
- How are things going with the library
- What is the major roadblock in the library achieving its objectives
- What are the strengths of the library, what is going well
- Are tasks not getting done
- Services that could be eliminated
- Any staffing needs for the library



7 Goals Identified

- Appropriate staffing levels
- Identify and prioritize customer needs
- Library staff and management will work collaboratively using positive and effective communications
- Collaborate with other libraries
- Engage Mn/DOT management to set direction for and provide support for the library
- Library and Research works collaboratively to serve transportation community's needs and meet innovation goals
- Acquire effective technology tools



22 Recommendations were identified to accomplish the Library mission and achieve its goals



Customer Service Recommendations

1. Meet and interact with Mn/DOT managers and employees in formal settings
2. Focus on customer needs; conduct focus groups
3. Make library more inviting (redesign physical space)
4. Value-added literature searches
5. Assess the benefits and costs of resurrecting IRIS service



Customer Service Recommendations (cont.)

6. Investigate library services statistical tracking systems (such as RefTracker)
7. Do targeted marketing of newly received materials;
Create more Alerts Services
8. Explore electronic opportunities (storage, Web site, delivery methods, ILL)
9. Explore the need of a Mn/DOT Archives
10. Deal with large backlog of overdue materials. Craft a new policy so it doesn't reoccur



Customer Service Recommendations (cont.)

11. Ensure policy decisions are based on facts (research). Work more closely with Research Office to identify new research needs (literature searches with no or few results) and prevent duplicative research. Emphasize a learning organization.
12. Library staff get cross-trained. Document all processes and procedures.
13. Link library business planning to agency long-term planning



Outreach Recommendations

14. Customer expectations have become increasingly higher for ease of access and timely delivery of the “right” information. Develop a formal marketing and communications plan for the Mn/DOT Library to meet customer expectations ...



Resource Recommendations

- Five major problems have resulted from the position cuts:
 - Professional librarians are performing work below their classification
 - Work load and backlogs are at an unacceptable level
 - Library services would be severely affected if any remaining (and highly experienced) would leave permanently or on a long term basis
 - There is no time to innovate – to find new ways to do things more efficiently and effectively.
 - The library director is doing more operational duties and has no time for managerial tasks



Resource Recommendations

15. Hire an additional professional librarian
16. Hire an additional library technician position
17. Retain experienced professional librarians
(explore if they should be reclassified)
18. Find innovative ways to further develop
library staff
19. Collaborate with other libraries (MTL,
MTKN, NTL, Pooled Fund)
20. Outsource some library tasks



Resource Recommendations (cont.)

21. Place additional focus on material budget and control for the library. Need librarian time and budget to acquire new materials
22. Take better advantage of new technology. New technology may offer some opportunities for better serving Mn/DOT. Stay informed about technology issues and opportunities.



Business Plan presented to Upper Managers in December 2008

- Determined plan to be an internal business plan due to no customer input
- Requested focus groups be conducted to gain their input in the business plan



Realizations to Date

- Electronic Resources librarian promoted to Senior Librarian level
- Karen Neinstadt hired as Reference and Outreach Librarian
- Budget to update the collection immediately (updated standard engineering texts, management, risk management, project management, engineering exam books, computers, and more). Circulation is up 33% and it's still early!
- \$2K per month book budget for this FY
- 4 focus groups held April – June 2009. 32 people interviewed



7 Priorities Identified Through Focus Groups

- Marketing and Communications
- Technology and Innovation
- Library Floor Plan Changes
- Redesign Intranet
- Provide Value-Added Services
- Provide Training on Tools and Techniques
- Continue to Update the Collection
- Create an Archive policy



Priorities of the focus groups informed “Phase 2” of the Business Plan.

- Develop a Marketing/Communications Plan
- Create a Library Advisory Group
- Develop a Technology Plan
- Redesign Library space
- Host a “Technology Fair” for Mn/DOT staff to demonstrate new technologies and demonstrate Web 2.0 tools and how other DOTs are using them effectively



Technology Plan and Re-design of space morphed into Development of a Transportation Knowledge Network

- Commissioner Sorel visited our Library Open House in April 2009. He was very interested in our Transportation Knowledge Networks display.
- We are working with Amanda and Mn/DOT staff to develop a Transportation Knowledge Network for Risk Management (TKN-RM).



Ongoing

- Working to secure funding for the Marketing/Communication Plan, the Technology Plan, the Library Advisory Board, and the Library Space Redesign



In closing

- We are fortunate to have a Commissioner who believes in life-long learning and is an avid reader. He understands the value of the library and our importance to the organization, and wants us to become the Knowledge Center for the Department.
- We are further fortunate to have the support of our Division Director, Bernie Arseneau, our Office Director, Nick Thompson, and our Research Director, Linda Taylor.

Thank you.

For additional information
contact Sheila Hatchell

Sheila.hatchell@state.mn.us