

Self-Service Options



Andy Panado
UC Circulation Unit Heads
Annual Meeting - 2009
March 26, 2009



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and Center for Knowledge Management



Power to the People!

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History of “People Power”

Survey Results

Making It Work



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is new way of



SHELVES MOVE IN NEW STORE

COMFORTABLY seated in a self-service grocery store just opened in Los Angeles, Calif., a housewife selects her purchases from moving shelves of price-tagged merchandise that pass before her. The endless, motor-driven chain of shelves, makes a complete circuit in eight minutes—leisurely enough for the customer to make her choices and lift the articles from their shelves. When her basket is full, she pays the cashier.



From the moving shelves of the self-service grocery store shown above, the purchaser selects goods as they pass on endless chain

OCTOBER, 1933

HISTORY / TIMELINE



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Trivia Question: When was the first coin-operated vending machine invented?

Answer: 1st century: first vending machine by Hero of Alexandria, dispensing holy water

1880's: vending machines re-introduced, dispensing postcards

1916: first self-service grocery store was founded in Memphis, TN (Piggly Wiggly)

1932: Carl C. Magee invented the first parking meter.

1971: first fully-automated teller machine (NY Chemical Bank)

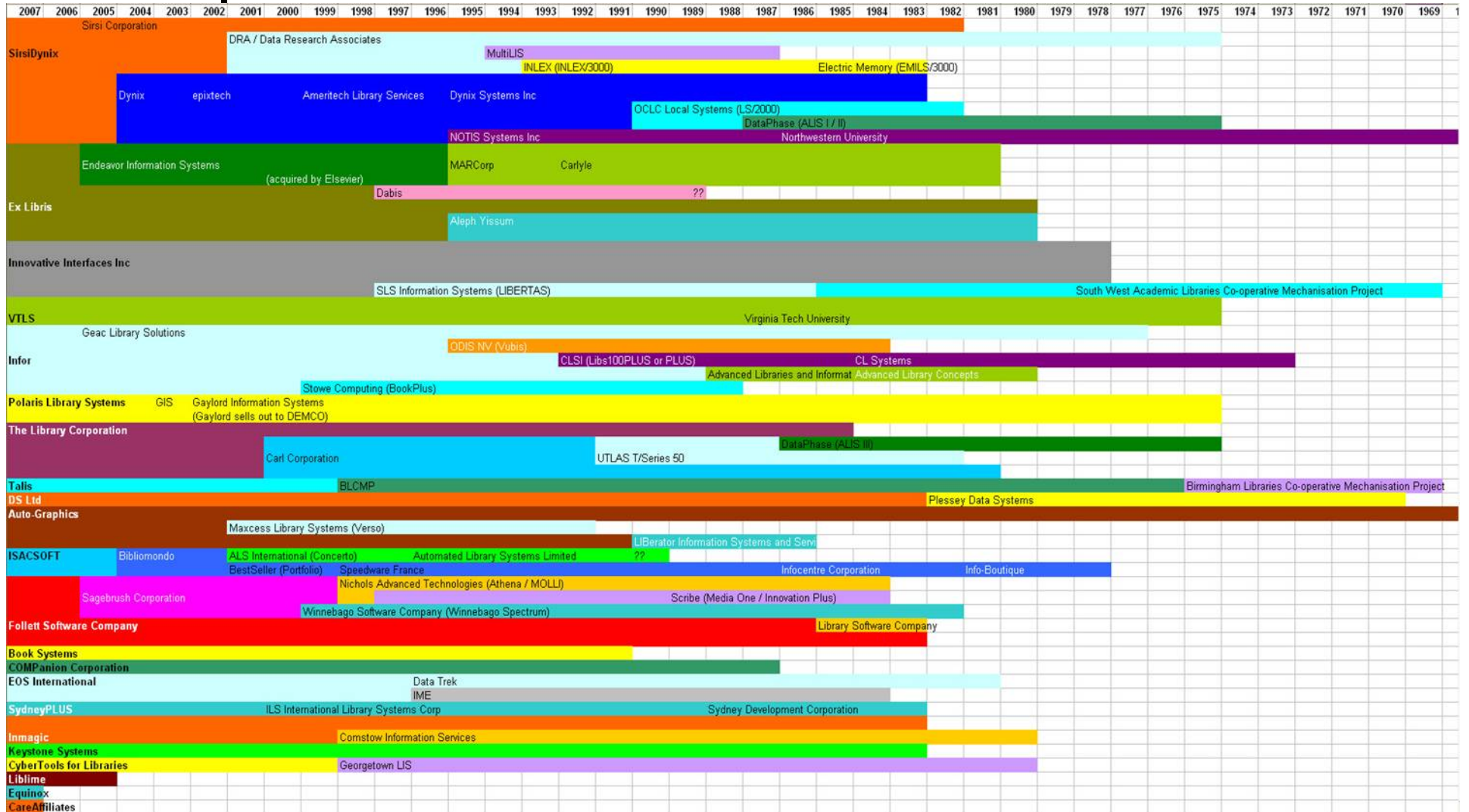
1992: Malmo Stadsbibliotek, experimented with first self-checkout library system with the first installation in 1998

- world wide web in late 1980's, Mosaic web browser in 1993





History of mergers/acquisitions (Created by Marshall Breeding, Library Technology Guides)





Origin:

- it started from business standpoint
- limiting
- how it translates into library environment

Why the change?

- customers: attitudes have changed and still changing
- customers: demographics, migration
 - effects on our stats:
 - ARL (1991-2002): 10% drop in circulation
 - drop in gate count
 - but 105% increase in interlibrary loan
- library automation: improving, new ones introduced, new features implemented
- other: collection transformations, economic reasons, etc.





SURVEY RESULTS

Andy enters his supervisor's office. Looking quite irritated, he asks, "Hey....do you still get crank calls from someone claiming he's a patron and says he wants something called service?"



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	CURRENTLY OFFERS THE FOLLOWING SELF-SERVICE OPTIONS:							
	Self-Checkout	Book Renew via automated phone	Book Renew via online system	Course Reserves Renew via online system	ILL using online form (Request, online form, etc.)	Patron reg. via an online form	View/update borrowing acct via an online system	Other
SRLF			X					SRLF Request. UCLA patrons can request an item from SRLF to be sent to campus library..
UCB			X (telnet only)		X			Study rooms in the Main Library.
UCD			X		X	X	X	
UCI – Langson	X		X	X (1 & 3 loans only)	X		X	
UCLA – Biomedical	X		X		X	Note: Student records downloaded with faculty/staff soon to come.		
UCLA – Law			X					
UCLA – Powell	X		X		X			
UCLA – Rosenbeld		X	X		X	X		
UCLA – Sci/Eng.			X		X		X	
UCLA – YRL	X		X		X		View only; no editing allowed	
UCM	X				X	Note: Students/personnel records are downloaded. Comm. & other fee borrowers can sign up online, but need to present ID on first visit.		
UCR – Rivera	X (Rivera & Science)		X		X		X	Billing Appeal Form, Reserve a group study room, Proxy Borrower
UCSB	X		X		X		X	
UCSC	X		X		X			
UCSD	X		X		X		X	
UCSF			X		X	Student records uploaded.	X	

WE DO NOT OFFER SOME SELF-SERVICE OPTIONS FOR THE FOLLOWING REASONS:						
	Cost	Cannot find the right product to meet our needs	Already using an in-house self-service product.	Small library, no need for a self-service product.	We are considering a service, but it is on hold.	Other (please enter here which self-service options you are commenting about)
SRLF	X			X		
UCB	X (may investigate phone renewals later)				X (self-checkouts, paging online on hold)	Looking into self-checkouts, automated renewals, self-serve hold shelves, etc.
UCD	X				X (i.e., cost)	
UCI – Langson						
UCLA – Biomedical						Maybe possibility of self-service reserve book room. Would allow users to browse and checkout reserve materials currently housed in a caged area, and free up staff time.
UCLA – Law						
UCLA – Powell						Handles mostly reserved items – which have limited number of copies in relation to demand.
UCLA – Rosenbeld						
UCLA – Sci/Eng.	X			S		
UCLA – YRL		X (in particular, would be interested in patron registration)				
UCM						The library does not allow renewal of books, CDs or DVDs because of the longer checkout time.
UCR – Rivera	X	X		X (Music and media only)		Booking module, new self-check, “My Records” feed
UCSB	X				X	
UCSC						
UCSD	X	X			X	Would like to have self-service study room bookings, lockers for hold pickups (but cost/location put idea on hold), and currently process of creating patron registration online, but it won’t be able to electronically submit.
UCSF	X			X (but may soon change as we’re considering purchasing self-checkout svstems.		

	EXPLAIN HOW OFFERING THESE SELF-SERVICE OPTIONS IMPROVED YOUR DAILY OPERATIONS, CUSTOMER INTERACTION, ETC.
UCI	The self-checkout and online renewals reduced traffic at the desk significantly. This was extremely helpful once we moved Reserves and now ILL to the Circ Desk. Course Reserves submissions are more efficient and we don't have as much paper to keep and instructors clogging up the desk while they fill out the form.
UCLA – YRL	Self-service renewals online took over about 75% of all renewals, so that has been a real boon. Self-service checkout is about 25% last time I looked, so that has been nice, it's a nice alternative if the line at the desk is long.
UCM	The bulk of the library's checkouts are laptops (over 80%); however, this item needs to be checked out at the services desk where the laptops are kept for security reasons. So, overall, the availability of self-check machines does not seem to greatly impact our daily operations.
UCR – Rivera	These have supplemented our services. They do not necessarily reduce staff time at the desk, because we spend a lot of time instructing library users on how to use them.
UCSB	Self-checkout: patrons who use it, love it. If we could customize the graphics, it would be much more popular. Daily, I have to stop people from setting the books on the machine incorrectly. Online renewals: gives patrons a sense of independence, and greatly reduces staff involvement and time. ILL online form, view/update account online, recall books online: same as above.
UCSC	We have only just implemented our self-checkout machine, so the feedback has been sparse. We have also been having some problems, so we haven't been able to reliably refer patrons to using it. In general, patrons have positive things to say about the online renewal options for both UCSC and ILL items.
UCSD	Online renewals has reduced the number of phone calls related to renewing materials. Self-checkout accounts for ~15% of checkouts from Social Sciences and Humanities Library.
UCSF	We started uploading student records every Fall Quarter about 3 years ago and it made a big difference.

MAKING IT WORK



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Create an institutional climate that supports change:

- management and staff – attitude change (top down)
 - management: understand effects on staff structures
 - may need to operate on flattened rather than hierarchical structure
 - staff: understand effects on their work
 - relevancy of existing skills, update, cross-training

Survey and understand your customers:

- more users do not expect personal contact (personal choices, type of curricula or program, or combination)
- listen to them
- be careful: “if ain’t broke, don’t fix it!”





Moving forward:

- ❑ Research for the right product, weigh in pros/cons among competing products
 - ❑ do not forget other UCs!
 - ❑ system integration: is it possible to integrate with current system? Is it possible to create an in-house product?
- ❑ Do cost-benefit analysis:
 - ❑ costs: capital cost, installation costs (including building adaptations), staff-related costs (retraining, documentation, etc.), user education (training, publicity, etc.), ongoing costs (service upgrades, yearly maintenance fee)
 - ❑ benefits: reduction in normal staffing costs, increase in service availability and flexibility (user benefit), decrease in space requirements for library functions





Survey the environment continuously:

- is the new system working?
 - get feedback from users
 - get feedback from staff
- reliability (while on the surface the self-checkout systems may appear to give staff more time away from the desk, someone will still have to spend time at the desk to deal with problem and complaints)
- how can the system be improved?





IN CONCLUSION



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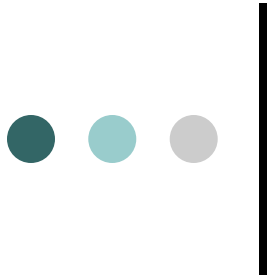


- We need to re-allocate our resources: circulation → direct services
- Since customers' attitudes are changing, perhaps we, too, should change ours. Manage our patrons much like businesses manage their customers. (Ebay, Amazon.com, MySpace or Facebook, etc.)

Lastly,

- 4 main phases in considering a self-service option: (1) start the change from within, (2) canvas your customers & offer appropriate services, (3) do your research, and (4) continually survey the whole environment.





😊 THANK YOU 😊



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CREDITS AND ACKNOWLEDGEMENTS

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