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You Can't Be Serious

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Technology Matters
You Can't Be Serious

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Every once in a while I get a call from someone with an idea they want to explore that just makes no sense at all. At least not at first.

The latest zany idea a client brought to me is a concept they dubbed, "pure central processing" and although my first response was, "You can't be serious" it is definitely growing on me. Their idea was to eliminate check-in at each of their branches entirely by letting people return things but instead of checking them in there, the items would be taken elsewhere for check-in and then brought back later. They weren't talking about moving from a staff check-in experience to a self-service check-in experience. They were talking about eliminating the check-in transaction and associated workflows from public service library staff and the library environment entirely.

Lots of libraries want to get their staff out of the check-in business. Typically, that means putting in a self-service return (or two). These returns are typically connected to sorters (aka "automated materials handling system" or AMHS). An AMHS helps staff with the work of checking in and sorting material. From the patron point of view, an AMHS might provide an interface that supports a one-at-a-time return workflow (insert one item at a time into a slot, see the verified check-in on the screen) or it could operate like a traditional bookdrop in which case a few items can be returned and checked in at once. The items are then separated behind the scenes by the machine. Either way, the check-in happens at the library to which the item is returned.

As soon as you check-in an item, you kick off a series of workflows. At check-in, you find out if an item:

- is going to fill a hold for one of your patrons. If so, it needs a hold slip printed and it needs to be taken to the Hold Shelves.
- needs to be reshelved, in which case, you probably do a little sorting and then place the item on a shelving cart (hopefully) or some other pre-shelving staging area.
- needs to go to another branch, in which case you need to put a routing slip in it or sort it into a special delivery bin for the delivery team to take away.

The check-in process requires check-in stations and check-in clerks (or an AMHS), plus space dedicated for labeling and sorting material to be shelved locally, as well as space dedicated to organizing material that needs to go somewhere else. And, of course, the staff to deal with it all.

The inspiration behind Pure Central Processing (can I call it PCP?) is to get rid of all that rigmarole in each library, and instead invest in one check-in system at a central location that would service all the returns received throughout the system. Their thinking is that we can't afford/justify AMH systems at each of our branches (especially the lower circulating ones) but we want to have more efficient materials handling, and we want to use our staff differently. And since we can get everything checked in within a few hours of return, what's the harm?

As someone often looking for the sweetest spot between customer value and cost effectiveness,

my first concern was about delayed check-in. Waiting hours for your item to be checked-in seemed like the exact wrong direction. I'm usually lobbying for instant check-in and reducing back-on-shelf time to minutes rather than hours. But since they have generous check-out policies for DVDs and other popular material and they don't charge fines, they'd largely addressed one of my typical concerns.

As we talked more about this PCP approach, I began to think about all the other workflows we could positively affect with this process. It would certainly transform the experience of circulation staff if they didn't have to deal with returns, holds, and sorting. By focusing on a single sophisticated AMHS for the system, instead of several smaller ones at each branch, they could   potentially make their investment count by providing more granular sorting for all branches and deliver everything directly to the holds shelves, or at least pre-processed and ready for shelving. They could redistribute their floating material in a more intelligent way. They could also optimize the delivery and trucking side of the operation. And they could take some steps centrallythat would make reshelving faster, less messy, and possibly even hidden from view entirely.

So I spent time analyzing library data and then went onsite to talk with administration (who had dreamed up this idea) and circulation staff at the branches (who were not particularly sold on the idea) and finally the delivery team (who were intrigued.) Over the course of several meetings, we explored the pros and cons as well as the opportunities this approach opened up.

I have to say I was impressed with the organization's willingness to explore options. No one reacted as if their job was at risk or even that their job was going to change negatively. They even allowed me to take them off on some exploratory tangents to see just how out-of-the-box

they were willing to go. They were pretty willing!

As we worked together, we began to see a value in separating public services functions from materials handling functions. We found ways to support more cost-efficient and patron-centric workflows for each area. Rather than having a circulation staff that does lots of materials handling as well as public service, we began to imagine a library where all staff on the floor were 100% public service staff. And we began to imagine a materials handling team whose customer was the public service staff.

The Materials Handling Team's job would be to gather all material from outside portable returns as well as interior book drops, check everything in, prepare holds for shelving, and then deliver and shelve all the returned items and holds at each location before the library even opened. This way the Public Services Team would arrive at work each day with shelves fully stocked, no overflowing bookdrops to check-in, no staged carts in the backroom and they'd be primed to greet and interact helpfully with patrons (instead of starting their day rushed and overwhelmed by in-process material).

We haven't worked out all the details yet. I'm still crunching numbers and thinking about delivery routes, schedules, truck volumes, and whether we can get everything checked-in, processed and back on the shelves within 24 hours. I'm confident now that we can make something happen that is even better and cheaper than they imagined, as well asbetter than the traditional approach of using self-service check-in as the primary way to get library staff out from behind the circulation desk.

I'm glad I didn't immediately shut down my client's creative thinking even though my consultant voice was saying, "you've got to be kidding" because I think we might be on to something here. The people staffing an open library

should all be doing public service during those open hours. People working in support of that public services work really need to get out of the way and allow them to do their job even better. By separating out the work of public services staff and materials handling staff – rather than conflating the two as circulation staff – we just might be able to improve the library experience for everyone involved.

The project has been a great lesson in the benefits of keeping an open mind. Any of us could have gotten stuck on one detail or another, and put the exploration of options to an end. Instead, we are on the verge of revolutionizing the experience of working in the library which, in turn, will radically change the patron experience of using the library and engaging with library staff.