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# On Becoming a Process-Focused Library

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# Context

- Emory University Libraries (EUL)
  - Woodruff
  - Business
  - Health Sciences
- Business Process Support Team (BPST)
  - Formed in April 2009
  - Cross-organizational team

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# BPST Role

- Previously the Core Team
- Support business planning in the EUL
  - Produce annual planning workbook
  - Coordinate and provide guidance for reporting
  - Open channel for communication about business planning

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# Key Lessons

## Success

- Keep it simple
  - Streamlining instructions
  - Adding flexibility
  - Migrating to web
- Ask for input
  - In formal sessions
  - Through examples

## Challenge

- Decide what's important
  - Measuring what matters
  - Providing guidance
  - Part vs. whole
- Communicate progress
  - Reporting format
  - Reporting schedule

# Moving Toward a Process View

<i>Process View</i>	<i>Functional View</i>
Emphasis on improving “how work is done”	Which products or services are delivered
Cross-functional coordination, teamwork stressed	Frequent “hand-offs” among functions which remain largely uncoordinated
“Systems view,” i.e. entire process is managed	Pieces of the process are managed
Customer orientation	Internal/company orientation

- From the Baldrige Criteria, definition of Work Processes: “your most important internal value creation processes. They might include product design and delivery, customer support, supply chain management, business, and support processes. ..”
- How do we get from a basically functional view to the process management view in our planning and assessment?
- How can we enhance our business planning practices to take us toward the process management focus?

From: McCormack and Johnson, *Business Process Orientation*

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# BPST's Charge and the Role of Reporting Meetings

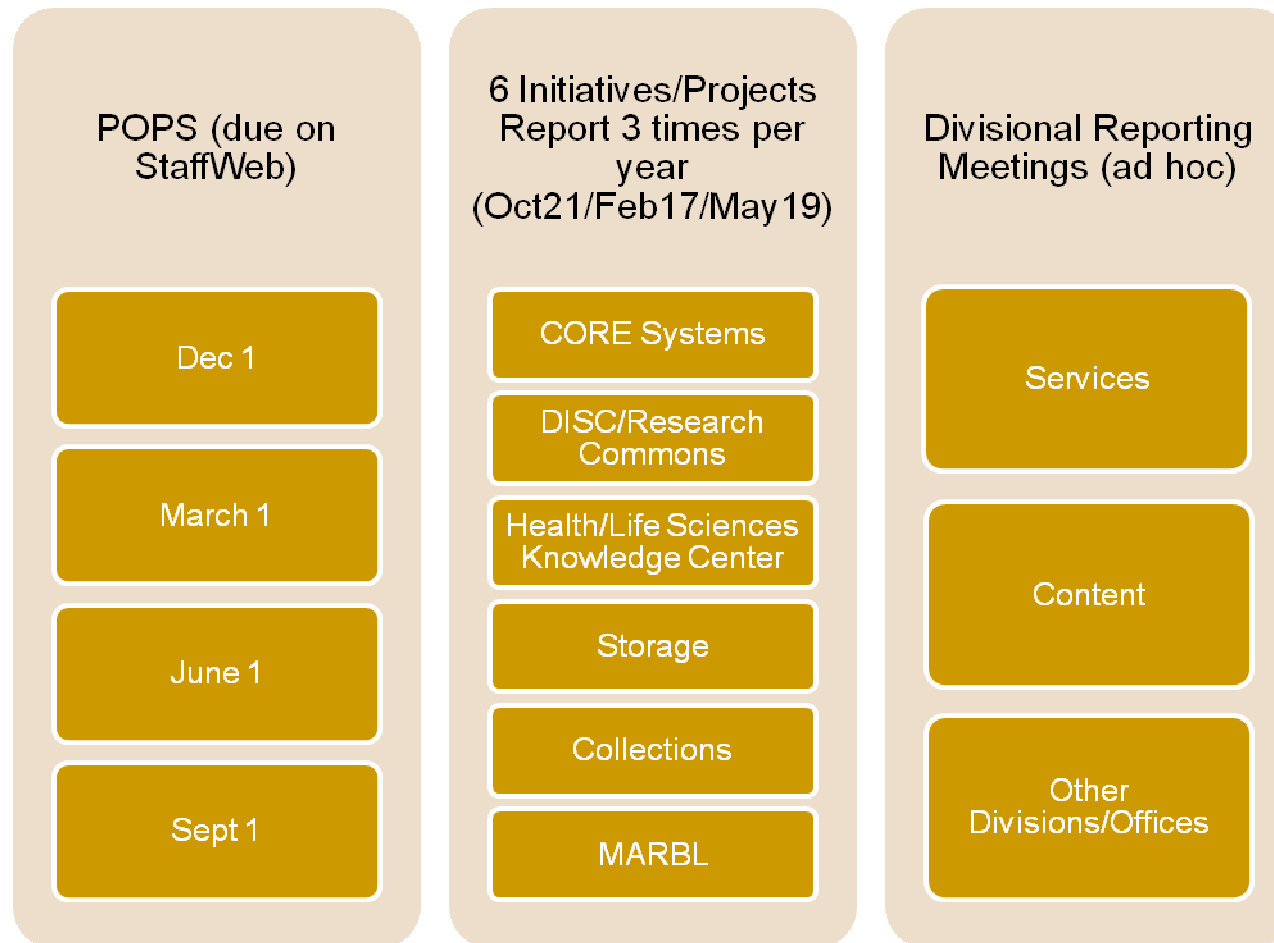
- Part of the Team's charge: "Create and manage methods for progress monitoring...Coordinate library unit report-outs periodically to ensure accurate progress reports...Preparing, scheduling, and supporting the monthly report-out meeting"
- The meetings' purposes:
  - Communication about how the organization as a whole is doing
  - Management review by senior leadership

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# Challenges associated with the reporting meetings

- There is often a tension between providing general information that keeps staff informed about library initiatives and projects and conveying information that is needed at the leadership level to tell how the library's key processes are performing
- Trying to use the meetings for both meant that neither staff nor leaders felt the meetings truly met their needs!

# Three Tracks for Performance Reporting for FY11





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# Performance Reporting Meetings for FY11

- Reporting on divisional action plan progress, formerly the key organizing element in reporting, will be accomplished through preparation of division level POPs (Project on a Page) quarterly
- Reports will be at the level of specific library priority initiatives for FY11 rather than at the level of functional divisions (Collections, Storage)
- Report-outs will occur 3 times per year

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# What is the significance of the change?

- Reporting at the division level was not surfacing cross-cutting issues, a goal of the reporting process
- Reporting at the division level often engaged only those staff in the division reporting, reinforcing a functional mindset or “silo mentality”
- Reporting at the project/initiative level will require more coordination among different functional units for gathering and synthesizing reporting data

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# POP only for quarterly operational reports

- POP prepared quarterly and posted to StaffWeb
- SMG meeting gives leaders an opportunity to raise questions, but not give formal presentations on their POP
- Operational division reports are encouraged, where divisions report to their members on progress and invite all staff to attend

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## Possible Next Steps?

- Evaluate and refine the new reporting process
- Further refine/facilitate the business planning process
- Support leaders with collecting, interpreting and presenting data
- Train staff
- Look for ways to utilize WEAVEonline in business planning
- Play a role in Baldrige introduction

# New Reporting Format—First Feedback- - Kudos!

- Good preparation
- Crisp presentation
- Good pace
- Good execution
- Cross cutting collaborative approach in preparation and delivery of the presentations
- Presentation format allowed director to focus differently in terms of what the info being delivered meant
- Generally positive feedback from staff who attended –they seemed more engaged

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# New Reporting Format—First Feedback- - OFIs

- We provided some data, but still need to improve use of supporting data!

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# QUESTIONS?

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