The Circulation Manager’s Tool Kit

Presented by Tom McMahon

Evening / Weekend Supervisor
Access Services Department
Northwestern University Library
Welcome!
What’s On The Agenda?

The goal

About NU Library / NU Circ

Our projects & their impacts
About Me
About Northwestern University

Locations:
- Main Campus – Evanston, IL
- Chicago Campus – River North Neighborhood
- Qatar Campus – Doha
  (And others)

Enrollment:
- ~21,200
- 40% Undergraduate
- 60% Graduate
- 222 Countries represented in student body
About Northwestern University Libraries

~7.1 million volumes

$29,000,000 annual budget

280 FTE staff
   60 FTE student staff = ~200 student staff

Main Library open 122 hours per week

800,000 visits annually

75,000 – 100,000 items circulated annually (system-wide)
About NUL Circulation

Part of Access Services Department

Open 97 hours per week during academic year

5 FT staff supervisors (+ 11-15 other access services staff)
- 18-22 PT student staff
- 1 supervisor + 2 students staffed at a time

Largest service point on 1st FL of Main Library
About NUL Circulation

Average circulation – 76,400 over last 3 years (at Main Library)

Service point for:
- NU material checkout
- ILL checkout
- Course Reserve material checkout
- AV / Tech items
- Misc items (chargers, markers)
- Library Privileges / guest borrowing
About Our Supervisory Staff

Work as circ supervisors 2-20 hours per week

Everyone’s a specialist AND a generalist
About Our Student Staff

Primarily undergraduate

Work Study And Non-Work Study

Work 9-12 hours per week
(sometimes more / sometimes less)
About Our Student Staff

Work flexible schedules set quarterly

Handle most basic department functions

Escalate questions to supervisor on duty as necessary
About Our Service Model

2 students work front desk

Supervisor sits ~10 feet behind

Supervisor on staff most hours
How We Conduct Training

Initial training for new hires
(1 quarter)

Quarterly follow-up training for returning students
Blog posts
Responses
1-on-1 sessions
Projects
A Few Preliminaries

These are examples / frameworks

Meant to be adaptable / scalable

Focus on the ‘spirit’ of each project, not the technicalities

All are low- to no-cost
Project #1

Conversations On Customer Service
Project #1: Conversations On Customer Service

The situation:

Students doing well with technical points of the job, but losing focus on customer service
Project #1: Conversations On Customer Service

The objective:

Have a group conversation about what makes for good customer service
Project #1: Conversations On Customer Service

One Problem:

No opportunities to get everyone in the same room at the same time
Project #1: Conversations On Customer Service

The solution:

Ask everyone for their thoughts on good customer service (by email)
Project #1: Conversations On Customer Service

Some examples:

“Good customer service is fulfilling the customer’s needs to the best of your ability and, if you can't, trying to find someone who might have more knowledge to better help them.”
Project #1: Conversations On Customer Service

Some examples:

“I think good customer service starts with the one providing customer service being empathetic to the one receiving customer service.”
Project #1: Conversations On Customer Service

Some examples:

“I think that good customer service consists of doing all that you can in order to help a patron. I feel like I have done my job best whenever the customer leaves the desk with a smile on their face!”
Project #1: Conversations On Customer Service

Some examples:

“I believe that good customer service consists of respectfully helping customers with a polite, friendly attitude, while also being able to handle any of their issues or answer any of their questions until they are satisfied. It also means representing your department in a positive manner.”
Project #1: Conversations On Customer Service

The outcome:
Project #1: Conversations On Customer Service

The outcome:

Student workers shown our ‘word cloud’ during 1-on-1 training sessions

We all realize patrons are in the middle of everything we do
Project #2

Crowd-Sourced Knowledge Base
Project #2: Crowd-Sourced Knowledge Base

The situation:

Need for an up-to-date knowledge base / quick reference at the desk

Not much time to put together a formal study
Project #2: Crowd-Sourced Knowledge Base

The objective:

Use student worker knowledge to identify topics

Quickly assemble this into the outline of your knowledge base; populate with relevant information
Project #2: Crowd-Sourced Knowledge Base

The solution:

Ask students (point blank, in person) what three topics are most important to know about

Do this spontaneously to elicit honest responses
Project #2: Crowd-Sourced Knowledge Base

The outcome:

‘Circ Notes’

https://sites.google.com/site/numaincircinfo/
Project #2: Crowd-Sourced Knowledge Base

The outcome:

An up-to-date knowledge base useful to student employees (new and experienced), as well as supervisors
Project #3

Exit Interviews
Project #3: Exit Interviews

The situation:

12 / 20 student employees graduating

=Brain drain!
Project #3: Exit Interviews

The objective:

Pick their brains via a brief exit interview

Adopt a ‘knowledge management’ mindset
Project #3: Exit Interviews

The solution:

Conduct Exit Interview in tandem with annual Performance Evaluation

Provide online version for those unable to be interviewed in person
Project #3: Exit Interviews

Circulation Student Workers: Exit Interview

We want everyone who works at the circulation desk to have a rewarding and engaging experience. Please take a few moments to share your feedback on your work experience. Thank you for sharing your talent and knowledge with us over the years!

What did you like most about working in circulation?
Your answer

What did you like the least?
Your answer

Did you feel your training was adequate?
☐ Yes
☐ No
☐ Somewhat

What could be done to improve training?
Your answer

What could be done to improve the circ desk work experience?
Your answer

Please rate your satisfaction with working at circulation.

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What confused you most about working here?
Your answer

What are things you would tell a new hire are most important to being successful in this job?
Your answer

How would you rank your job at circulation among your other priorities on campus (Greek life, internships, etc)?
Your answer
Project #3: Exit Interviews

The outcome:

A wealth of information!
Project #3: Exit Interviews

Some takeaways:

Job satisfaction is high

Good training → Confident employees

Students don’t like to say ‘no’

Students believe a focus on patrons is essential for success
Project #3: Exit Interviews

The outcome:

Updates / adjustments to our training

Increased range of items for checkout
Project #4

A 360 Degree Survey
Project #4: 360 Survey

The situation:

Some supervisors hesitant / not comfortable giving feedback about student workers (either on the spot or later)

↓

I don’t get feedback → Students don’t get feedback
Project #4: 360 Survey

The objective:

Find a way to solicit feedback (anonymously) from supervisors

Share feedback with students; ask them to reflect

Share reflections with supervisors to complete the loop
Project #4: 360 Survey

The solution:

An online survey
Project #4: 360 Survey

Circulation Supervisor Survey

Please consider completing the questions below to share your input on student worker training and performance at the Circ Desk.

* Required

What are student workers at the Circ Desk doing well? *
Your answer

What can student workers at the Circ Desk improve on? *
Your answer

What do you see as the core skills / knowledge necessary for student workers to be successful at the desk? *
Your answer

Are there particular student workers whom you would like to commend or whose work you would like to comment on? *
Your answer

Is there anything regarding student workers at the Circ Desk you'd like me to follow up on directly? (If so, please leave your name).
Your answer

Submit

Page 1 of 1

Never submit passwords through Google Forms.
Project #4: 360 Survey

Supervisor Feedback:

What students were doing well:

Alma basics    attention to patrons    punctuality    friendliness
appropriate escalation to supervisors   policy knowledge
Project #4: 360 Survey

Supervisor Feedback:

Areas for improvement:

- ease of interaction / confidence
- communication w/ supervisors
- knowing limits of responsibility
Supervisor Feedback:

Comments on individual students:

‘(Jenna) is superb with patrons and always makes sure to ask for help when needed.’

‘(Erica) is a good example of enthusiasm and customer service.’

‘(Rudy) is always going above and beyond.’
Project #4: 360 Survey

Supervisor Feedback:

Comments on skills essential to student success:

- knowledge of library layout
- searching skills
- customer service skills
- confidence
- listening
- problem solving
- policy knowledge
- circulation skills
- attentiveness
- ability to make appropriate referrals
Project #4: 360 Survey

Next Step:

Share compiled feedback with students

Ask them to comment on:

one piece of positive feedback
&
one recommendation for improvement
Project #4: 360 Survey

Student feedback on supervisor feedback:

Supervisors: students “know 99% of the questions they are asked”

Students:

‘I feel like I do know the answers or how to find the answer for most questions, but if I don't know, the person that I'm working with will know.’

‘I think this is a great goal for me to work toward. Right now I feel comfortable with ~90% of the questions but there are still a few things that pop up that I'm not familiar with.’
Project #4: 360 Survey

Student feedback on supervisor feedback:

Supervisors: ‘they could learn to answer questions like weekend hours, multimedia hours, etc.’

Students:

‘This one is probably especially important to get a refresher on with the new Deering library hours since Mudd closed.’

‘In general I know the hours of main pretty well, but I do agree that I don't really know the hours of the other parts and need to look them up if I'm asked about them.’
Project #4: 360 Survey

Student feedback on supervisor feedback:

Supervisors: ‘I also wish that some of the student workers would say excuse me more when I’m trying to shelve and they reach across or step in front of me.’

Students:

‘That's something I'll make sure I do every time in the future.’

‘This is something I'm sometimes forgetful of. I think it's most important to be getting the patron's books as soon as possible, but also practicing basic courtesy while people are doing their jobs is very important.’
Project #4: 360 Survey

One more step!:

Compile student reflections and share them with supervisors
Project #4: 360 Survey

The outcome:

Supervisors have a channel to share feedback on student performance

Students have an opportunity to reflect on this feedback

Supervisors have an opportunity to read student reflections

Increased connectivity to our loose group
Project #5

Online Staff Directory
Project #5: Online Staff Directory

The situation:

Some supervisors do not know our students and their capabilities / training / experience
Project #5: Online Staff Directory

The objective:

Figure out what employee information would be useful to supervisors

Put this information in an easily accessible location
Project #5: Online Staff Directory

The solution:

Create a central directory of all current employees

An offline web page (built in HTML) including:

Employee pictures / names / bio information

PDFs of completed training documents
Project #5: Online Staff Directory

A mockup of our staff directory
Project #5: Online Staff Directory

The solution:

Create a central directory of all current employees

An offline web page (built in HTML) including:

Employee pictures / names / bio information

PDFs of completed training documents
Project #5: Online Staff Directory

How I did it:

Build out HTML framework

Collect images of each employee’s ID Card

Compile relevant information (biographical / experience)

Scan / upload completed training documents
Project #5: Online Staff Directory

Options I didn’t pursue (but you might):

LibGuides – not permitted by Library policy

SharePoint – permissions issues

Other proprietary software - $$$ / permissions issues

‘Online’ web site – FERPA / HR policies
Project #5: Online Staff Directory

The outcome:

Supervisors have a better idea of who’s who

More interpersonal connectivity → Better student performance

We have a central repository of completed training documents
In Summary

Anything that creates connectivity or confidence among staff results in a focus on improving services

Gathering brief reflections from student and supervisory staff in our performance being seen as less ‘mechanical’

It is possible to have meaningful ‘conversations’ or ‘dialogues’ that are not limited to time and space

Projects don’t need to be time-consuming / disruptive / expensive to have noticeable positive impact
Thank you!

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