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Using Process Mapping to Facilitate Positive Library Change

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Using Process Mapping to Facilitate Positive Library Change

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What is Process Mapping?

“Business process mapping takes a specific objective and helps to measure and compare that objective alongside the entire organization's objectives to make sure that all processes are aligned with the company's **values and capabilities.**”

Why Process Mapping in a Library?

- Sometimes we need to separate the personalities and people from the processes
- Helps us to focus on what our values are as a library

Why Process Mapping at Michigan?

- Old reorgs
- Tight budgets
- Production units and changing workloads
- Looming retirements

A Quick Glance at Our Process

- Permanent Team Created
- Scope out the issue at hand
- Interviews/Meetings
- Charting
- Sharing
- Revising
- Reporting Out

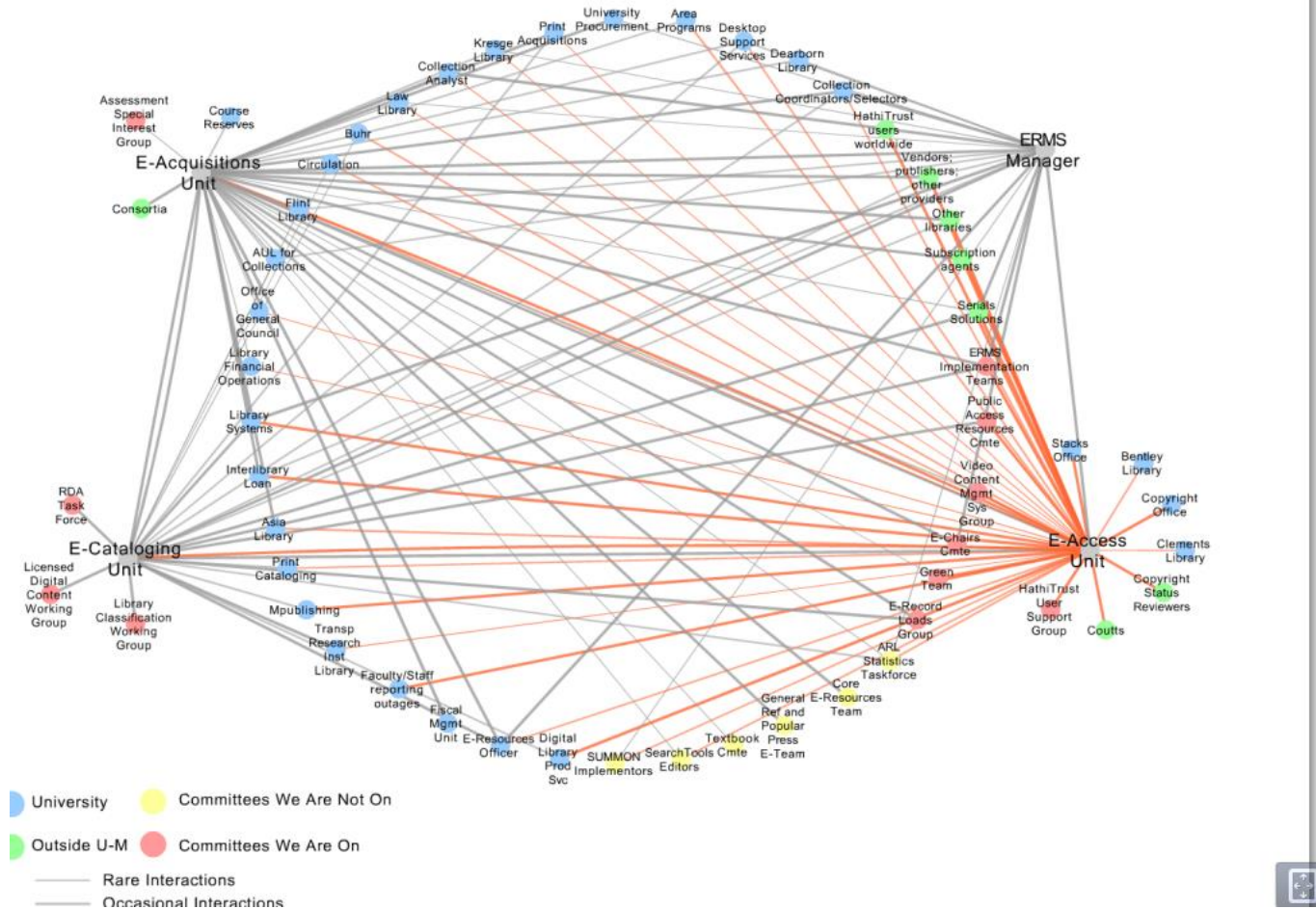
Some Rules We Live By

- Transparency
- Inclusion
- Active Listening
- Cone of Silence
- Evidence based decision making
- Staying true to our library's values and mission

Visualizing the Work

- Interaction Graphs
- Staff Responsibility Matrix
- And of course Flow Charts

E-Unit Interactions

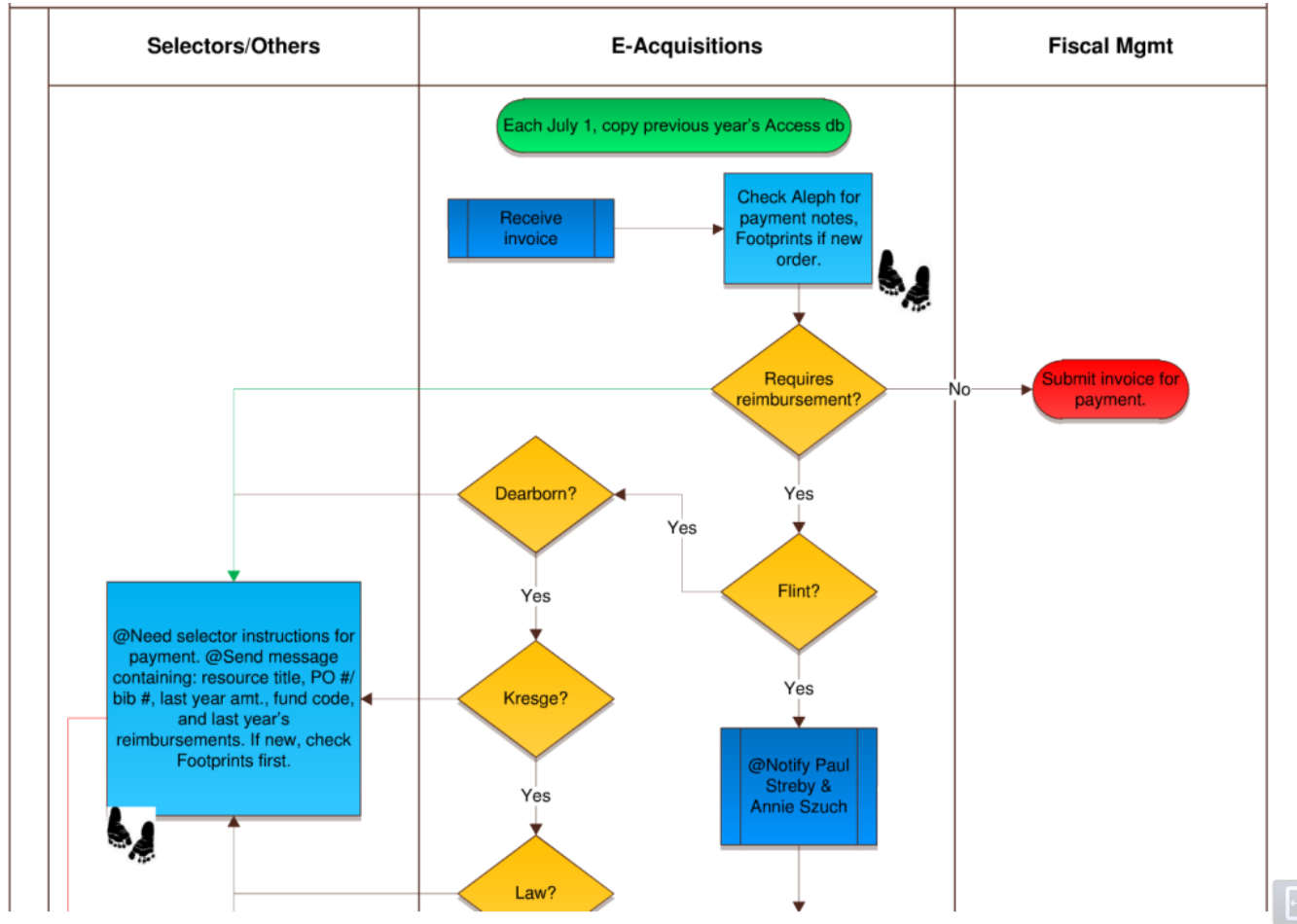


Staff Responsibility Matrix

Staff Responsibility Matrix for E-Resources

E-RESOURCE LIFE CYCLE	TASKS	SUBJECT SPECIALISTS	E-RESOURCES OFFICER	E-ACQ UNIT	E-CAT UNIT	E-ACCESS UNIT	ERMS MANAGER	COMMENTS
SELECT	Manage trial	X	X					E-acq enables access to trials
	Evaluate and select e-resource	X	X					
	Negotiate pricing	X	X					
	Assign budget and approve purchase	X						e-acq corrects fund codes + Flint
	Publicize e-resource to users	X						
ACQUIRE	Negotiate license			X				
	Place order			X				
	Identify and communicate license terms of use			X				Martin: "I'd like to talk more about "Identify and communicate license terms of use." How do the four groups of users contribute to this task?"
	Process invoice and authorize payment			X				
	Coordinate and track reimbursements			X				
Process renewals			X					
PROVIDE ACCESS & MAINTENANCE	Oversee activation of user access			X	X			
	Update Search Tools	X						
	Maintain OpenURL link resolver					X		
	Load/create/edit bibliographic records					X		E-acq creates bib records
	Activate e-resources in Summon					X	X	E-acq activates resources in Summon
	Update coverage and holdings					X	X	E-acq manages subscriptions
	Oversee Deep Blue normalization						X	
Perform URL maintenance					X	X	Connie: "Is URL maintenance also done by E-Access?"; Martin: " URL maintenance: I believe Dennis said he doesn't edit URLs that are reported through mirlyn-corrections and Heather and Kenyon create E-Cat tickets when they encounter them during outages"; Kenyon: I do it as part of Linkscan maintenance but only for free resources so not often. If I'm doing Linkscan work and I see a URL for a paid resource that needs to be changed I save it along with other paid URLs I find through Linkscan during the month and open a ticket with E-Cat with the list.	
ADMINISTER	Facilitate high level browse					X	X	e-Cat assigns classification #s to minimal level records and adds classification #s to OCLC records that lack a call number.
	Perform authority control					X		
	Maintain title lists			X	X			E-Cat creates title lists, usually by downloading a list or spreadsheet from the publisher's website
	Track title/publisher/platform changes			X	X	X		
	Coordinate 3-campus and consortial purchases	X	X	X				
	Track vendor and publisher contacts			X				
PROVIDE SUPPORT	Participate in copyright determination					X		
	Troubleshoot/triage outage problems					X		
	Perform e-access quality control					X		e.g. quality testing of the success and failure of linking of users to electronic resources via MGett and 360Link.; E-Cat monitors and reports Serials Solutions bibliographic, coverage, and URL problems. The unit also monitors and reports problems with vendor and OCLC records that are batch loaded.
EVALUATE & MONITOR	Manage Mirlyn corrections					X		
	Log and analyze incidents					X		
	Log and analyze breaches		X					
	Provide collection evaluation analysis	X	X					
END OF LIFE	Gather usage statistics		X	X				
	Manage preservation and archival units			X				
	Cancellation of e-resource			X				
	Remove Search Tools entry	X						
	Update Catalog (delete, amend, close end date)				X			
	Put up speed bump							
Investigate post-cancellation access			X					

Flow Charts



Benefits of Process Mapping

- Move beyond the mindset of “We’ve always done it this way.”
- Allows for positive change management and continued efficiencies
- If we can make these processes lean and mean we can get on with the real work-promoting scholarship and library magic.

Where are we now?

- Permanent team
- Library wide Process Mapping boot camp and workshops
- Continue to refine our structure and processes
- New goal setting and retreat initiatives
- Working strategically

Questions?

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