Access and Engagement Service Model Plan

INTRODUCTION

The Access and Engagement Implementation Workgroup was formed in March 2017 and was comprised of front-line staff and managers from six libraries in the Metropolitan Library System. The group was charged with developing a model for how to best meet the needs of our members and achieve the goals of Library Unbound using an Access/Engagement paradigm. The members were: Dana Beach, Britini Brecheen, Kate Brooks-Etzkorn, Michelle Merriman, Mark Schuster and Ashley Welke. The group met over the course of three weeks and developed a proposal, which was shared with staff on the intranet in April 2017. The following plan is based on the workgroup's research and ideas, as well as the input and feedback of staff across the system.

SERVICE MODEL OVERVIEW

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Metro Service Model Statement

The Metropolitan Library System grows smarter communities, one person at a time. We are committed to providing welcoming and inclusive experiences for our members, using the M.E.T.R.O. Way.

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Key Components of the Service Model

- Create a user-friendly environment where library staff approach and greet customers, rather than the other way around
- Staff own their expertise by using the triage model to provide high quality and meaningful service
- Staff are responsible for managing the transition during triage to ensure a seamless experience for members
- As much as possible, staff should provide a one-stop-shop experience for members. When a member is triaged from one staff member to another, that staff member should finish out the interaction whenever possible, including assisting with check-out.

Key Components of the Member Experience

- As members enter the library, they will be greeted warmly and proactively by staff
- Staff will be easily identifiable to members (e.g. lanyard, branded technology, name tag with position and expertise, cardigan or sweater vest, polo)
- Staff are available when and where they are needed
- Seamless experience for members, where triage feels like getting "five-star service"

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METRO'S FIVE STEPS TO CUSTOMER SERVICE

M.E.T.R.O. stands for…

THE M.E.T.R.O. WAY

Make Contact. Warmly and proactively greet the member.

Engage Member. Ask welcoming questions to understand the member's needs.

Tailor your approach. Listen actively. Determine if you can help. Triage with a team member when necessary.

Respond. Provide members with a variety of resources and solutions.

Outgoing Goodbye. Thank the member for visiting the library and encourage them to visit again.

OWN YOUR EXPERTISE

All Staff Expertise: as a team, all library staff own our members' experiences
- Creating a welcoming and inclusive environment
- Exterior and interior library appearance
- Member conduct

Access Expertise: as a team, Access staff provides members with immediate access to resources, materials, and/or experiences
- Directional questions
- Specific collection-related questions
- Hold & ILL requests for specific titles
- Check ins & outs, renewals
- Fines
- Account information
- Library accounts & Guest passes
- Quick technology assistance
- Printing, Copier/fax
- Accessing the internet, email, specific websites
- Accessing public computer software

Engagement Expertise: as a team, Engagement staff provides members with deep engagement with a single or multiple resources, materials, and/or experiences
- Readers Advisory / Read-a-likes
- Research assistance or questions requiring research
- Database assistance or questions requiring database use
- Looking for materials by genre, subject, age group, reading level, etc.
- In-depth technology assistance, such as: creating documents in Word or Excel, installing Overdrive, etc.
- Programming and Inter-Reach

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HOW TO TRIAGE

Staff will engage with members proactively and determine their needs. If a question is outside a staff member's expertise, they will use the following triage model:

Step One

- Are you the expert?
    - o Yes: handle it!
    - o No: go to the next step

Step Two

- Is the expert available?
    - o Yes: utilize expert staff member with a warm hand-off
    - o No: call for an expert from the backroom. If an expert is not available, go to the next step.

Step Three

- Are other members waiting for service?
    - o Yes: let the member know the expert will be with them shortly
    - o No: If you have the knowledge, handle it! If you do not have the knowledge, let the member know the expert will be with them shortly.

ZONES

Zones are areas of the library where a set of services is provided or resources are located. For example, a library might designate the following zones: welcome and check out/in zone, computer zone, collection zone, study/research zone, children's zone, teen zone, etc. Zones will oftentimes include a service desk that will serve as a "home base". Since all libraries currently have desks that serve as visual "get help here" cues for members, staff should maintain open lines of sight to the desk when working in a zone with a service desk.

Managers will designate and assign staff to zones on the public floor. Identifying zones will help ensure effective and efficient coverage throughout the library.

SCHEDULING

To achieve Library Unbound, we need to change the way we schedule and staff the public floor. Managers will schedule staff for the following rotations:

Engagement Rotations
- Public floor time
    - Focus is solely on customer service
    - When staff are scheduled on the public floor, they should be actively and consistently engaged with members or in a customer service task (e.g. edging/straightening, filling displays, updating PR)
- Backroom (on-call for public floor)
    - Focus is on planning for community engagement (programs and inter-reach) and working on projects
    - Staff are available to quickly assist members on the public floor as needed
- Engagement time
    - Focus is on planning and conducting community engagement

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Access Rotations

- Public floor
    - Focus is solely on customer service
    - When staff are scheduled on the public floor, they should be actively and consistently engaged with members or in a customer service tasks (e.g. edging/straightening, filling displays, updating PR)
- Backroom (on-call for public floor)
    - Focus is on backroom tasks/projects, such as: check-in, delivery, and processing materials for de-selection
    - Staff are available to quickly assist members on the public floor as needed
- Shelving
    - Focus is on ensuring library materials are back onto the public floor within 24 hours of check-in; Ensuring materials are in order and edged
- Projects
    - Focus is on completing projects both in the backroom and on the floor, such as: displays, weeding, processing materials, committee work, etc.

At minimum, there should always be:

- One AS II scheduled on the public floor
    - AS I will be scheduled to meet business needs, and may not be scheduled all hours the library is open

- One ES I (or higher) scheduled on the public floor with a Librarian (or higher, including a manager with an MLIS) scheduled in the backroom

OR

- One Librarian (or higher, including a manager with an MLIS) scheduled on the public floor

IDEAS FOR FUTURE DEVELOPMENT

Technology

- Means for staff to communicate between public floor and backroom
- Paging system, walkie-talkie, cordless phones, etc.
- Secure cash drawer
- Means for collecting and analyzing data
- Question tracking system to determine scheduling needs
- Adequate technology for staff
- iPads for staff to use on the public floor (re-purpose existing iPads at each library)
- Computers/laptops/tablets in backroom for staff work

Facilities

- Move towards smaller, more collaborative service desks on the public floor
- Spatial planning based on community needs
- Space for members that is flexible and versatile
- Adequate space for staff to work in the backroom that is flexible and versatile