Continuous Quality Improvement

New Directors' Institute
CARLI, May 2017

The Setup

How to review your effectiveness: usage, satisfaction, retention, persistence, student learning outcomes.

How do these metrics fit with Program Review, College-wide assessment programs, and internal CQI efforts?

1. Lean Management & Libraries
2. CQI
3. Where to Start?
4. Examples
5. Resources

Lean process management is guided by five principles:

- Specify value as defined by the customer whose needs are served by this work process, analyze all activities from the customer's point of view, and identify any wasted effort that does not serve the customer's needs.

- Identify a value stream by using flow charts or other tools to examine every step, to categorize each step as either value-added or non-value-added, and to eliminate blatantly wasteful steps.

- Generate flow in the process to prevent bottlenecks and batching.
- Utilize pull processing (Just-In-Time processing) practices.
- Pursue perfection through continual review and improvement of the process (Womack and Jones 16-26).

*In a library setting, these principles could be used as a tool to build employee confidence and increase their capacity for change (Tornquist and Steinlicht 2).

Brick and Click Libraries Conference
November 7, 2014

Huber, John J. (2011). *Lean Library Management: Eleven Strategies for Reducing Costs and Improving Customer Services.*

- Recognize that service performance is the key to customer retention.

- Transform your change-resistant culture.

- Understand how delivery service chains drive your library's performance

- Align your performance metrics with your delivery service chains.

- Transform your new book delivery service chain.

Huber, John J. (2011). *Lean Library Management: Eleven Strategies for Reducing Costs and Improving Customer Services.*

- Transform your customer holds and reserves delivery service chain.

- Transform your cost control philosophy to a lean service improvement philosophy.

- Transform your overall library service performance metrics.

- Transform your digital research delivery service chain.

- Transform your delivery service chain from a ''push'' to a ''pull'' philosophy.

- Think lean before the concrete is poured.

What is CQI?

- Emphasizes **organization** and **systems**

- Focuses on "process" not the individual

- Most things can be improved ("if it ain't broke, don't fix it.")

Core Concepts

- Meeting or exceeding customer expectations
- Problems are in processes, not people
  - Not blame
  - Process improvement
- Reduce or eliminate unwanted variation in processes
- Small, incremental changes using scientific method
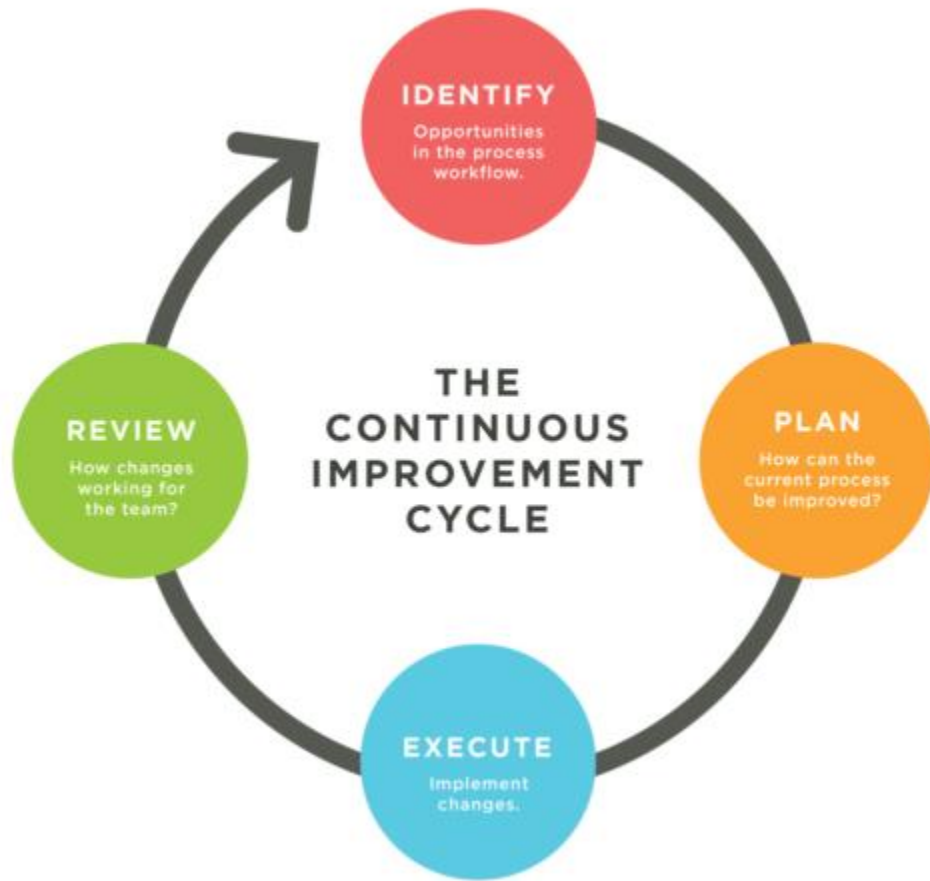- The way everyday work is done

FOCUS on one issue

Find a process to improve

Organize to improve a process

Clarify what is known

Understand variation

Select a process improvement

Plan, Do, Check, Act

- Plan
  - Create timeline for resources, activities, training
  - Develop data collection plan for measuring outcomes
- Do
  - Implement changes
  - Collect data
- Check
  - Analyze results
  - Evaluate reasons for variation.

- Act
  - Act on data/evaluation
  - Decide next steps
  - Successful changes become SOP
  - Analyze unsuccessful changes
    - Design new solutions
    - Repeat the PDCA cycle.

Conditions for Successful Implementation

The Five Most Important Questions (Drucker)

1. What is our mission/purpose?
2. Who is our customer?
3. What does our customer value?
4. What are the results we seek?
5. What is our plan?

Activity

In small groups answer these questions about your library/institution:

- What needs improvement?
- Who is affected?
- What would the improvement look like?
- How can we meet the goal?
- How would you try the ideas? What is the plan?
- How will you judge success?

VALUES

Institutional alignment

Learning outcomes

User experience

Where to start?

Mission statement:

- Why do we do what we do?
- Why do we exist? What is our reason for being? Our purpose?
- The commitment we are making to the community/institution
- How do people benefit from what we do?
- What do we want to be remembered for?
- The broader societal impact we want to have
- Who is our community?

Mission Statements- Why?

- A mission statement represents consensus on what an organization thinks is important.
- Mission statements **inspire** and **guide** organizational action.
- A mission statement supports an organization by setting **expectations** for itself and the community it serves
- A **short** (one sentence?) and **meaningful** mission statement can be readily embraced and internalized by the organization's members, and readily understood by the community it serves.
- Answers the following questions:
  - **What** do we do?
  - **For whom** do we do it?
  - What is the **benefit** of what we do?

Where to start?

Values statement

- What do we believe in? (values statement)
- What are our core values?

Where to start?

Vision statement

- How do we see the future? (vision statement)
- What will we do to get there?
- What will success look like?
- What is our promise of what we shall one day be?
- Our long term aspirations?

Mission Statement	Vision Statement
What do we do? For whom do we do it? What is the benefit?	What do we want to do/become/go going forward? When do we want to do it? How do we want to do it?

- The first thing to do is to read the *Standards for Libraries in Higher Education.* Yes, even if you've read them before, read them again.

- Second, for every indicator, write a couple of sentences describing what you do or do not do related to that indicator.

- Third, for every indicator, come up with a way to assess what you do. I was pleased to realize that for a decent number of the indicators, there is only a binary: do you or don't you? And so long as you can prove you do whatever it is, no further assessment will really be necessary.

- Fourth, divide the assessment over the years between now and the next time your major accrediting body will visit. For us, it will be Middle States Association of Colleges and Schools and they will be here in 2020. If you're unsure when you'll be getting a visit, ask around.

MICA Decker Library

Roadmap

Resources

- "2016 top trends in academic libraries: A review of the trends and issues affecting academic libraries in higher education" - _College & Research Libraries News_, June 2016.

- "High Impact Educational Practices" - AAC&U, 2009

Assignment

1. What do you need to know before you start to plan?

2. Make a list of data you need.