

Introduction

B.O.S.S. is an acronym for Branch Optimum Stock Sizes. The B.O.S.S. project was undertaken as a means to provide customer-focused collections in each of Wellington City Libraries' twelve branch libraries. The project is an innovative and ground breaking piece of community library research. The findings from the research component of the project were successfully implemented over the branch library network between March 2003 and June 2004. The project is a success for customers, the community and the Council.

The need for the BOSS project

The project was originally proposed by the Collection Development Team which selects and purchases all collection materials for the Wellington City Libraries' (WCL) network. Prior to this the branch library collections were purchased according to the perceived demand of library customers, a "what we think the customers want to read, listen to and borrow" approach, and to give customers access to a full range of subjects and formats, even in the smallest of branches. Selectors wanted a strategy or process to stock the libraries with material which better met the actual needs of the customers of those libraries. As a result of the B.O.S.S. Project and B.O.S.S.i, the implementation phase of the project, the previously tired and under-used branch library collections have been transformed into up-to-date customer-focused collections appropriate to the size of each library's customer base.

Benefits of the project and how it furthers Council's vision

The B.O.S.S. project has had tangible benefits for both branch library customers and Wellington City Council (WCC). From the Council's perspective B.O.S.S has provided much-needed information on what branch library customers really want to see in their library collections, both in terms of subject (e.g. fiction, cooking) and format (e.g. videos, CDs). Customers have benefited because from this research we have been able to tailor branch library collections so that their content better meets their needs, and that there is sufficient choice of materials to borrow from. These factors have led to increased levels of customer satisfaction. WCL has benefited because the Collection Development Team has been able to redirect collection funding into the areas of highest demand and select materials more appropriate for branch library collections, giving better value for the collection dollar. Having researched our customers' needs so thoroughly, we have contributed to Wellington City Council's strategic goal of "knowing our city". Providing customer-focused collections directly supports Wellington City Libraries' mission statement of being "the first choice of Wellingtonians seeking to enjoy and benefit from fact and fiction".

Effective project management techniques

The project itself was divided into two phases, and each phase was undertaken by a different project team. While the core project team members were Libraries staff, other staff within Council who had specialist skills were consulted, and contractors were used where necessary.

The first phase, referred to as B.O.S.S., invented the methodology for the project, carried out the research on the collection needs for each branch, and

made recommendations for implementing the research. The second phase, referred to as B.O.S.S.i, implemented the findings and recommendations from B.O.S.S., modifying them when it proved to be necessary in their practical application.

The concept of the B.O.S.S. Project was initially presented to the Libraries' Leadership Team in an informal flow-chart diagram for endorsement *in principle*. It was then that the project properly began.

B.O.S.S. phase:

- A project team was established, consisting of a Project Sponsor (WCL Libraries Manager), a Project Owner (Team Leader, Collection Development), a Project Manager, and three project team members. The Project Manager and one of the project team members were drawn from the Collection Development Team; and the other two project members, came from other areas in WCL. The Project Manager was mentored by a team leader with wide project management experience. Other staff with specialist skills, from within WCL and WCC, were consulted when needed.
- A team of three, two senior staff members from WCL and one from WCC provided mentoring to the team and ensured that quality management principles were followed.
- A budget outlining estimated costs for the project was prepared.
- A written project plan, giving an outline of its purpose, objectives, scope, project costs, risks and benefits to both branch library customers and to Wellington City Council was submitted to the Libraries' Leadership Team, which endorsed the project.
- A communications plan was prepared in order to manage the communications over the project for WCC, WCL staff and WCL customers, particularly branch library customers.
- The research on customer collection needs was undertaken, using a blend of quantitative data from the WCL's computerised library

management system and qualitative data from customer surveys, publicly advertised meetings with branch library customers and staff knowledge of customer preferences. Demographic data from the 2001 Census was also included.

- From the research the project team submitted a report to the Libraries Leadership Team, giving their findings and recommendations. With one or two changes, the report was endorsed and work began on the second phase of the project, B.O.S.S.i (the implementation of B.O.S.S.).

B.O.S.S.i phase:

- A project team of four was established consisting of a Project Sponsor (WCL Libraries Manager), a Project Owner (Team Leader, Collection Development), a Project Manager, and three project team members. The Project Manager had been a member of the B.O.S.S. Team. The other team members were drawn from throughout WCL.
- A budget outlining estimated costs was prepared.
- A written project plan was submitted to the Libraries' Leadership Team, which endorsed this second phase of the project.
- A separate team of WCL staff members were assigned to weed the branch libraries of the outdated and redundant collection material. This was undertaken over a 12-month period, with four of the most overstocked branch libraries being weeded first.
- WCL branch library staff were fully briefed on the process of B.O.S.S.i, both through meetings held with the Project team and with the distribution of written material.
- Branch library staff worked alongside the weeding team. The B.O.S.S.i team held workshops where staff were upskilled in the new collection priorities and received training in weeding procedures.
- Written material was prepared for branch library customers, explaining the process and the reasons for it.

Participatory approach to communicating with stakeholders

Because this project was directly focused on library customers' needs, we needed to accumulate as much information on customers' use of their branch libraries and the collections. We also needed the support of all WCL staff, who were also stakeholders in this project. This was achieved through:

- Direct customer participation through the gathering of quantitative data from a postal survey on collection content preferences, commissioned from ACNielsen. The survey was sent to 600 randomly-selected adult and young adult customers from each branch library (the Mobile Library had only 249 customers and all were surveyed), a total of 6849 in all which equated to about 10% of all branch library customers. We had hoped for a return rate of 33%; the actual return rate was an astounding 52%.
 - Indirect customer/stakeholder participation through the gathering of quantitative data drawn from WCL's computerised library management system. From a sample 6 months' worth of records, which were then annualised, we were able to identify the numbers of customers using each branch library, how frequently they visited, what type of customer they were (children, teenagers or adults), how many items on average they borrowed at any one time and what they borrowed (e.g. adult fiction, young adult CDs, children's videos).
 - A week-long survey of all material looked at, but not borrowed, by customers was undertaken in each of the branch libraries.
 - Children were surveyed through a written survey during scheduled class visits to branch libraries.
- Public meetings, which took place in the evening, were held in four of the biggest branch libraries, each in a different geographical area, to explain the project to branch library customers.
 - The CEO of WCC, Gary Poole, and the WCC senior management team were briefed on the project by the Libraries Manager, and the CEO talked about the project during his regular spot on a local commercial radio station.
 - Meetings were held with all Libraries staff in the branch libraries, as well as in the Central Library, to explain the project. Staff were encouraged to contact project team members with questions they might have, or clarification they might need, particularly when liaising with customers over the project.

Innovation and originality

The B.O.S.S. project is a unique piece of community library research with practical application to our organisation.

In order to tailor library collections to meet customer needs we needed a methodology or concept to follow. We researched library literature world-wide, and while we found examples of standards for the performance of public library collections, we were unable to find any methodical process of how these standards were arrived at. We therefore had to develop our own methodology.

Our first step was to look at some of the public library collection performance standards we had researched, and see they could be a useful benchmark for us. It quickly became apparent they were most useful in listing performance measures, and were used as a basis in forming our own key performance indicators which would determine the project's outcomes.

Those KPIs which were used included:

- The number of individual library cards used at each branch. Since branch libraries in Wellington are located close together, and library customers use more than one branch, this was the most accurate indication we could get of the numbers of customers using any one particular branch.
- Total number of issues in each subject or format
- Stock turnover rates

The methodology, or concept of the project, was worked out in brainstorming sessions using a “mind map” approach. The essential requirements and tasks of the project were then drawn up in flow-chart form on a huge sheet of paper, which became fondly known to the project team as “Blankie” (see Appendix I). Included in Blankie were the objective of the project, the selecting of KPIs, and type and amount customer use data required and how to acquire it, and the meshing and analysis of the data which would shape the project’s outcomes. Tasks were placed roughly in sequence, with timeframes attached, and as ideas were more fully formed or amended they were added to Blankie.

The team “tested” the methodology on senior WCL staff as well as other professionals, e.g. business analysts and planners, both in and outside WCC. Once they were satisfied with the methodology, they took the next step of presenting it to the Libraries Leadership Team, in order to gain their support for the project to commence. When that support was given, the concept outlined in Blankie was more fully developed into the actual project plan, and the project commenced.

One aspect of the project which proved particularly challenging to the B.O.S.S.i project team was the design of stock rotation routines. Stock rotation is a long-standing system whereby stock is rotated on a regular basis between the branch libraries. With the setting of different collection sizes for

each library, managing these routines so that the collection sizes do not become distorted has proved to be challenge. New stock rotation routines have been set but it is recognised that they may have to be adjusted over the next two to three years before they are considered to be at correct levels.

It is important, now that the project has been completed, that the process of maintaining the branch collections at the recommended levels is continued. “Collection advocates” have been selected in each of the branch libraries. Their task is to continue to weed outdated and redundant stock and to ensure that stock rotation is done as scheduled. It is anticipated that the collection advocates will be an important factor in maintaining the integrity of the new collections.

The successful implementation phase of B.O.S.S, has resulted in the careful targeting of budget funds into more appropriate subjects and formats, and selectors have changed their stock selection patterns. Branch library collections have been weeded of outdated, damaged and unsuitable stock and, along with the targeted purchasing of new stock have been rejuvenated as a result.

Successful result

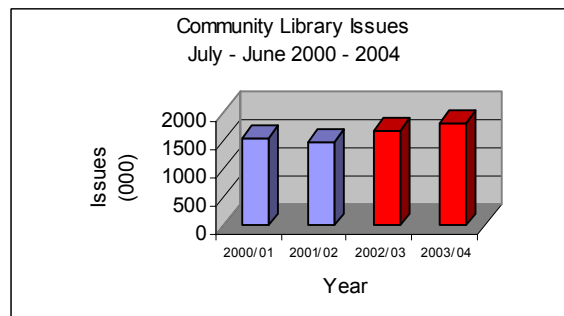
The B.O.S.S. project has fulfilled all our expectations. The research into customers’ actual borrowing patterns and their collection preferences have led to the selectors in the Collection Development Team having a greater understanding of customers’ collection needs in the branch library system.

Non-financial benefits

Customers

Customers' visits to the branch libraries, along with issues, have risen markedly since the beginning of the implementation phase in 2003. Graph 1 illustrates the strong growth in customer usage of collections.

Graph 1. Community Library Issues

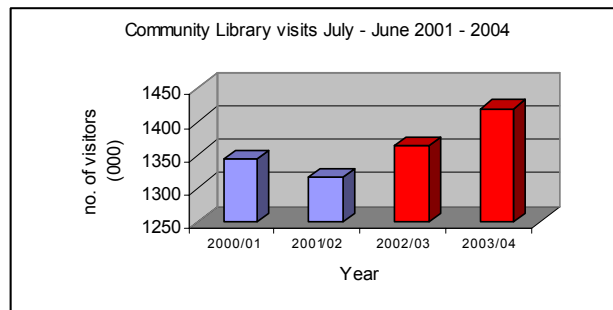


Issues have increased by 300,000 since 2001.

This 18% growth in business supports the successful implementation of the BOSS findings during 2002/3-2004.

Strong library collection performance is supported by increased community use of library facilities. Community libraries received 1.4 million visitors in 2004. Graph 2. illustrates the growth in visitor numbers to community libraries since 2001.

Graph 2. Community Library Visits.



Visitor numbers have increased by 100,000 since 2001.

The growth in visitor numbers supports the Council's community outcomes of increasing access to quality recreation and information resources.

Customers are clearly responding to smaller, community focused library collections. The material on the shelves now closely matches customer expectations and needs. Having smaller, more focused collections has enabled staff to improve collection layout and utilise creative display options e.g. face out shelving and stand-alone displays.

Overall customer satisfaction with Wellington City Libraries is high. The Libraries commissioned BRC Customer Satisfaction Survey, 2003 reports 98% satisfaction rating.

Community Outcomes

The whole community benefits from having library collections which closely match community needs. Customer usage of library collections supports outcomes of literacy, education, recreation and life-long learning in the community. 94% of residents rated the quality of the libraries good or very good in the 2004 Wellington City Council Annual Residents Satisfaction Survey.

WCL benefits

The Collection Development Team has benefited by having the knowledge of customer collection preferences. Budget planning for the financial year ahead is much more straightforward and the team are now able to build collections in the branch libraries they know will be used and appreciated by library customers.

Financial benefits

Improved return on investment for the collection dollar

Wellington City Council benefits from an improved return on investment for the collection dollar. Libraries materials are now working harder than ever because the selection of library materials is fully informed by customer preferences. Branch library collections are now able to be replenished on a 10 year cycle - an improved result from 15-20 years pre-B.O.S.S. The project has provided customer-focused collections whilst ensuring residents and ratepayers receive improved value for money.

Good, sensible and right thing to do

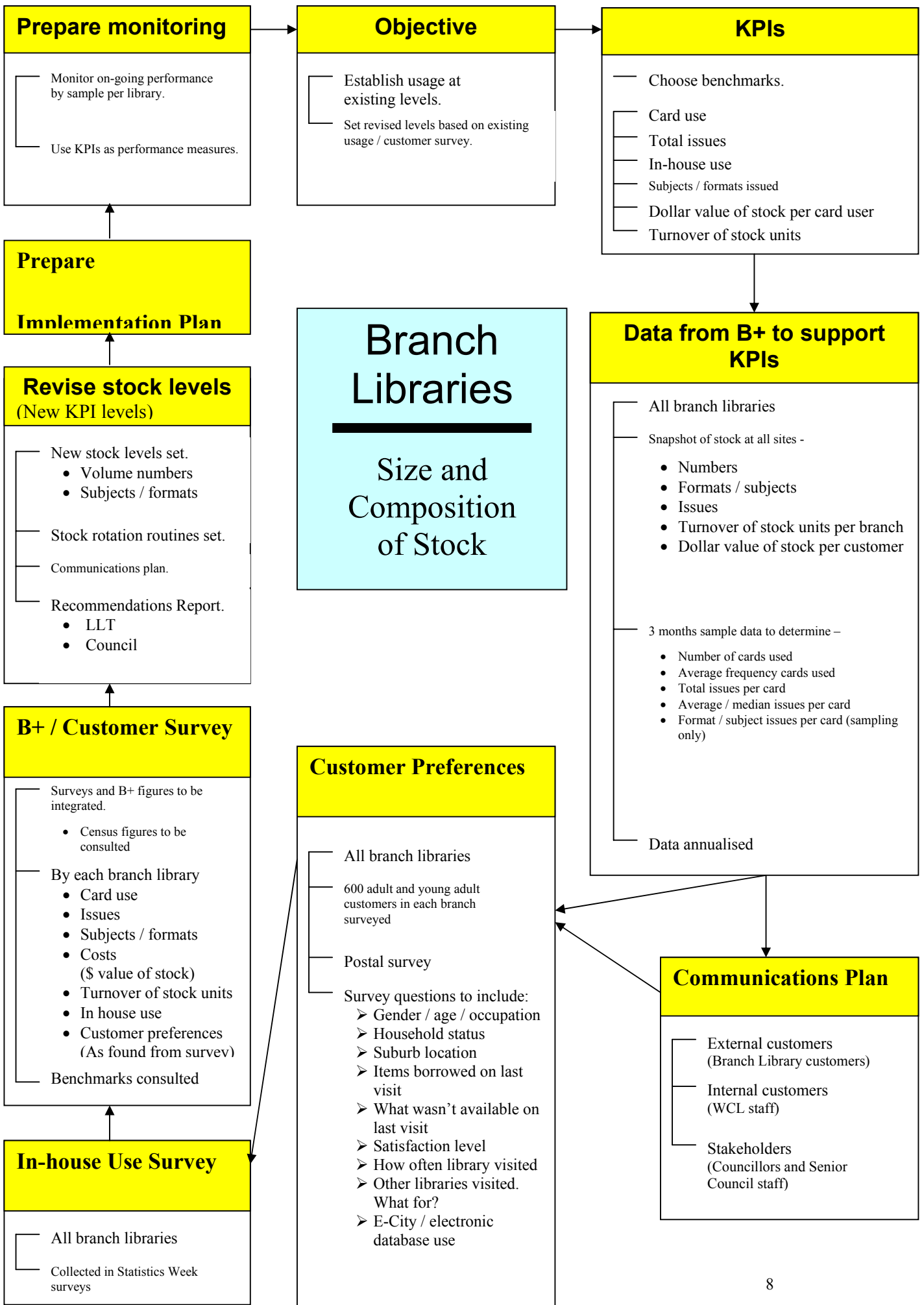
Wellington City Libraries has a high profile throughout the city and the branch library network is regarded by residents essential to their communities and their individual well-being. Most branch library customers are fiercely loyal customers, using their local branch for the majority of their library borrowing. Offering collections which most closely match the needs of those customers is “the good sensible and right thing to do”. Customers now have collections which best reflect their needs identified as a result of the B.O.S.S Project. The stock, although reduced in numbers, is newer, is better displayed, is in subjects and formats that the customers most want to borrow, and will be replenished in shorter intervals than previously. WCC has assurance that the collection budget is being spent on collections which best meet customer expectations thereby increasing customer satisfaction, and thus give ratepayers, who ultimately fund that budget, best value for money.

The ultimate success of the B.O.S.S. project can be demonstrated by the example of the Johnsonville branch library (see Appendix II).

Appendices

Appendix I – Branch Optimum Stock Sizes Flow Chart (Blankie)

Appendix II - Case Study – Johnsonville Library

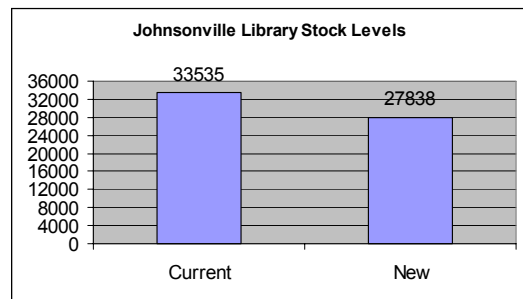


Appendix II – Case Study – Johnsonville Library (Collection performance pre and post BOSS implementation)

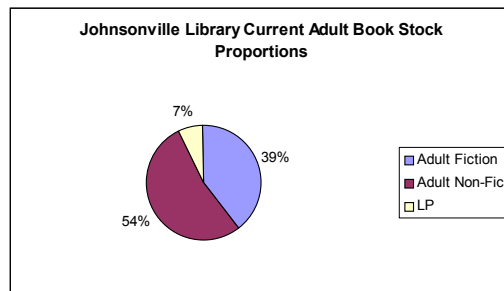
Johnsonville Library is one of Wellington City Libraries largest and busiest community libraries. The case study of Johnsonville library is representative and typical of the results of the implementation of the B.O.S.S. findings at the other community libraries in the Wellington City Libraries network.

The B.O.S.S. findings showed that the collection at Johnsonville Library needed to change significantly to meet the needs of the community. The overall collection size needed to reduce to stock the Johnsonville at optimum levels – (see graph 1.)

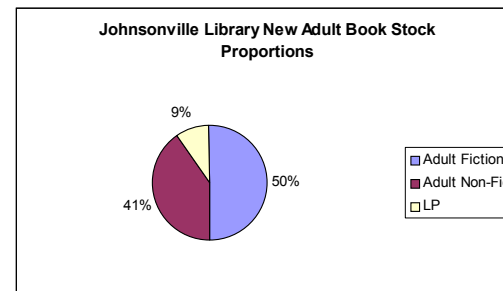
Graph 1. Johnsonville Library Stock Levels as recommended in the B.O.S.S. findings.



Graph 2. Stock proportions pre B.O.S.S.



Graph 3. Recommended B.O.S.S. stock proportions



The content of the Johnsonville collection also needed to change to better meet the needs of customers. The B.O.S.S. findings provided rich information about customer collection preferences. Graphs 2 and 3 illustrate the required shift in stock proportions for the adult book collections. The pre-B.O.S.S. findings (Graph 2) show the disproportionately high ratio of non-fiction material to fiction material prior to B.O.S.S.. The B.O.S.S. recommendations (Graph 3), based on the extensive research, shows the required shift in fiction and non-fiction books to achieve the desired result. Other areas of Johnsonville Library’s collection needed to shift to better match customer needs and the demographics of the catchment e.g. pre-school materials required a boost.

Implementation of the B.O.S.S. findings for Johnsonville Library

An implementation plan was developed to achieve the desired collection size and content of the B.O.S.S. findings at community libraries, including Johnsonville Library. The plan focused on achieving an immediate result. This was balanced with long-term sustainability of the goals of the project. The end goal of implementation was for staff to engage in the B.O.S.S. process as ‘business as usual’. To achieve the B.O.S.S. findings at Johnsonville Library (and other community libraries) the following approach was adopted.

Weeding Team (the B.O.S.S.i Posse)

A weeding team, consisting of 3 staff with expertise in branch library collections, were seconded to the B.O.S.S.i project for 4 months. This team was responsible for removing old, tatty, and under utilised library materials from community libraries. The findings from the project provided this team with rich information about low performing collection areas. The team removed over 4000 items from Johnsonville library over a period of three weeks. (see graph 3).

Reallocation of collection budgets

At the same time collection budgets were reallocated for the new financial year. Collection reallocation ensured budgets for individual collection areas e.g. cookery matched the shift in collection emphasis so clearly illustrated in the B.O.S.S. findings. For example the fiction budget increased by \$100,000 while compensatory savings were found in under-performing non-fiction budget areas.

Revised selection of library materials

The Collection Development Team which selects library books and audio-visual materials updated their buying patterns and content decisions. The B.O.S.S. findings provided rich information about what customers want in their community libraries. For Johnsonville Library there is focus on fiction, especially mysteries, lifestyle non-fiction, e.g. cookery, interior design and computers, as well as children's material such as pre-school videos and first chapter books.

Permanent stock and stock rotation patterns

Stock rotation and permanent stock allocation patterns were reviewed to ensure a equitable allocation of materials in the future. Part of the problems with community libraries in the past has been small branches being overstocked while larger branch libraries had too few items. This was attributed to the vagaries of the old stock rotation system. The implementation team developed and implemented revised stock rotation patterns. Under the new rotation patterns Johnsonville Library receives more and better stock in proportion to customer usage.

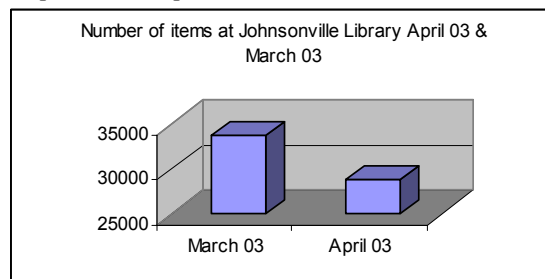
Collection Advocates

One staff member at each of the branch libraries has a particular responsibility of being a collection advocate. The collection advocate champions collection-related issues, e.g. ensuring stock is clean and is presented well, and acts as a conduit between branch library collections and the Collection Development Team. During the implementation of BOSS the collection advocates received training from the B.O.S.S.i weeding team, and it will be their responsibility, and that of all branch library staff, to continue on the work undertaken by the B.O.S.S.i weeding team on a daily, business-as-usual basis.

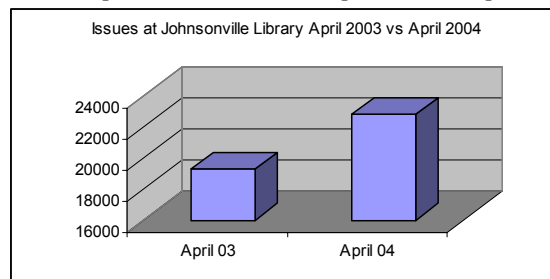
Results

The result of implementation at this site, during March 2003, is typical of results at the other community libraries. Customers have responded well to smaller, but more targeted collections. Issues and visitor numbers have increased significantly since the implementation of the project.

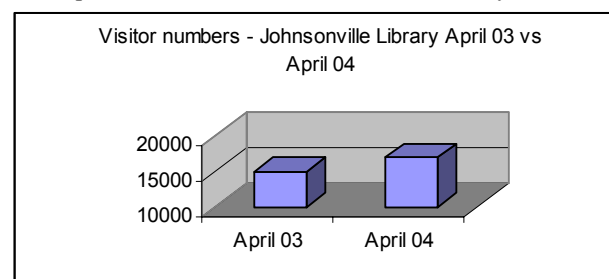
Graph 4. Post Implementation Stock Totals



Graph 5. Issues Statistics April 2003 vs April 2004



Graph 6. Visitor numbers Johnsonville Library



Collection performance improved with 10%, or 23,000, additional issues, one year after implementation. Visitor numbers have also increased by 10%, or 18,000, additional visits since implementation. B.O.S.S. has contributed strongly to this successful result for the community and Wellington City Council.