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Chapter 15: Reader services during a time of major changes

1 Services to Readers: Just-In-Time

A significant challenge during the period of the moves of library materials was to ensure that our readers continued to have access to as many of them as possible. In response to this, we established a 'Just-In-Time' service to assist readers. During the main move activity, between November 2010 and December 2011, over 5,000 mediated requests were processed, with the service achieving a 96 % success rate. Building on the success of the Just-In-Time service, in the late spring of 2011 as the migration of the integrated library system was quickly approaching, a live chat service known as 'SOLO Live Help' was launched. The aim of this new service was to provide remote and real-time assistance to readers during the period of catalogue downtime as part of the transition to the new system, Aleph.

2 'That's terrific – thanks very much – what a service!'

– a reader's comment on the Just-In-Time service in November 2010.

A key challenge across 2010 and 2011 was to ensure that our readers had access to as much of our collection as possible whilst the stock moves were under way. Many other major libraries in this kind of situation have simply closed their doors or have offered very restricted services, but our plan from the start was to offer readers as 'normal' an experience as possible during these moves by delivering a 'Just-In-Time' service.

The library system in Oxford is extensive. At the heart of this thriving but complex network of services are the Bodleian Libraries. Operating across multiple sites, each year the Bodleian Libraries serve more than 65,000 readers – over 40 % of them from beyond Oxford.

The vast majority of the Libraries' print collections have never been immediately accessible to our readers. To obtain an item that was not on open shelves readers or library staff ordered it via an Automated Stack Request System (ASR) for retrieval by library staff. The ASR support team worked behind the scenes to

address the many complications caused by the disparate nature of the Libraries' holdings, legacy systems and multiple classification schemes.

Following the opening of the Book Storage Facility (BSF) to the Libraries in October 2010, over 7 million items were moved from dispersed stack locations to the BSF or to open-access shelving in our city centre locations. Many items were moved more than once. Inevitably this meant that there would be times when significant areas of our collections would be in transit and therefore unavailable for consultation.

Under the leadership of the Project Sponsor, the Assistant Director, Research & Learning Services, a small project group was established to address this issue. The tone was set by our sponsor from the very beginning with this confident statement:

> Just-in-time delivery service: we will provide a service to compensate for the temporary una-vailability of materials. We intend to ensure continuation of **current** [authors' emphasis] levels of service, access to stock through the transitional period including, where appropriate, through alternative provisions.

The Just-In-Time project (or JIT as it soon came to be known) was envisaged as the first of a series of new service initiatives that would potentially develop and continue to deliver value-added services after the moves were completed.

3 Planning for Just-In-Time

After some initial preparatory work, a small project group was assembled in June 2010. Taking lessons from earlier local moves and from examples elsewhere (such as Imperial College London and Queen's University Belfast),[1] the basic principles and key work streams of the work were drafted and agreed and a budget was identified.

We agreed that a dedicated support team would be established to provide a Just-In-Time service, the main remit of the team being to source and provide alternatives to stock otherwise inaccessible whilst being moved.

We agreed also that the readers served by this initiative would include not only current members of the University but also the many thousands of external readers that the Libraries serve each year.

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1 'Document delivery to your desktop', *Impact: your Imperial College Library newsletter*, 16 (Summer 2010), 7, accessed 30 June 2012, https://workspace.imperial.ac.uk/library/Public/ Impact16.pdf; informal conversations with colleagues.

The full scale of the challenge was unknown. We had figures for a whole range of metrics including the number of items requested from stacks each day during normal operation and at first glance these seemed intimidating. For example, in 2009–10 348,000 items were retrieved from stack locations for readers to consult. However, we presumed that the possible scale of the problems would be alleviated by a number of factors. For example, the bookmove project was not one monolithic move during which no stock would be accessible at all. Instead, items would be moved in discrete and (in most cases) identifiable blocks of stock, which in theory would be ingested and then made available from the BSF within just a few days.

In addition, high-use materials as well as the most recent materials were to be kept in easy-to-access city centre stacks for almost all of the period of the moves. And of course Oxford had recently dramatically increased its investment in online journals and e-books (see chapter 5).

Given this uncertainty, the Just-In-Time team had to be as flexible as possible, with a main Project Coordinator appointed but options left open for the recruitment of at least one full-time assistant. Back-up support from the existing Automated Stack Request (ASR) support team was confirmed from the start and staff from elsewhere in the Libraries were drafted in to support the work as required.

We identified flexibility in our ability to source materials from as wide a range of sources as possible as being essential to the success of the project. We agreed a wide range of sources of content including Oxford's colleges and academic departmental collections; Oxford's growing electronic collections (purchased and digitized); commercial e-book suppliers; on-demand journal content providers; a wide range of available electronic resources such as the Internet Archive; Amazon, Blackwell's and other print book suppliers; the British Library's urgent document supply service; institutional repositories; internet archives; and, of course, other major academic and public libraries in our locality.

We agreed to exclude special collections materials (in the main pre-1900 materials) from the remit of the JIT team, together with maps and music or materials associated with Oriental studies. Enquiries relating to these types of material would be directed towards the relevant subject and curatorial staff.

We worked out a basic methodology and accompanying workflow to deal with reader requests, and a specific category to identify easily items in the catalogue that were in transit. All items being shipped to the Book Storage Facility were assigned the status 'Book Moves' and we put a process in place to ensure that any requests submitted for those items were routed directly to the JIT team.

We recognized at an early stage that good communication would be key – both with our readers but also just as crucially with our staff across the Libraries and wider Oxford library community. We drew up publicity materials aimed at

readers in collaboration with the Bodleian Communications Team and distributed them across libraries throughout the University. Prominent notices were placed on SOLO and on the Libraries' web pages. We published items on the work of the team in the staff newsletter *Outline*.

4 As It Happened

The large-scale book moves started in October 2010 and while recruitment for the JIT project staff was under way the existing ASR team provided enhanced cover and support for readers. The JIT Project Coordinator took up her post in November and started to deal with reader queries directed to her by desk staff, and orders placed on SOLO for items in transit to the BSF. She also provided valuable project support for associated pieces of work relating to the book moves.

The two main paths followed by our readers and staff during the delivery phase of the project were as outlined in Figure 15.1.

When a reader made a request for an item with the status 'Book Moves' the request was routed directly to the Just-In-Time Project Coordinator. She then ran through a number of possible stages and options to source a copy of the item, and contacted the reader with a proposed solution – for example the location of an electronic or print alternative or the offer of a free interlibrary loan. In more complex issues the reader was contacted to discuss a range of possible options.

Figure 15.2 provides an overview of requests dealt with by JIT across its year of operation.

The spike in May indicates a busy term-time period and the sharp rise in July was the result of the downtime caused by the migration to a new integrated library system (see chapter 11), during which Just-In-Time was used to mediate all requests, not just those in transit to offsite storage.

The graph at Figure 15.3 summarizes the main sources of locating additional copies.

We fulfilled 72 % of requests either by finding another print copy within the University or by finding access to an electronic copy, through subscription or openly available resources. 14 % required purchase, either through booksellers or inter-library loans, which was subsidized 100 % by the Bodleian Libraries.

Overall 96 % of requests could be satisfied with additional copies, which left a troublesome 4 % that eluded our searches. This 4 % comprised unique material, such as theses, and some foreign-language materials, and particularly older or more obscure material from non-UK publishers. In these circumstances the reader was advised to re-apply for the item, which became available usually within two weeks.
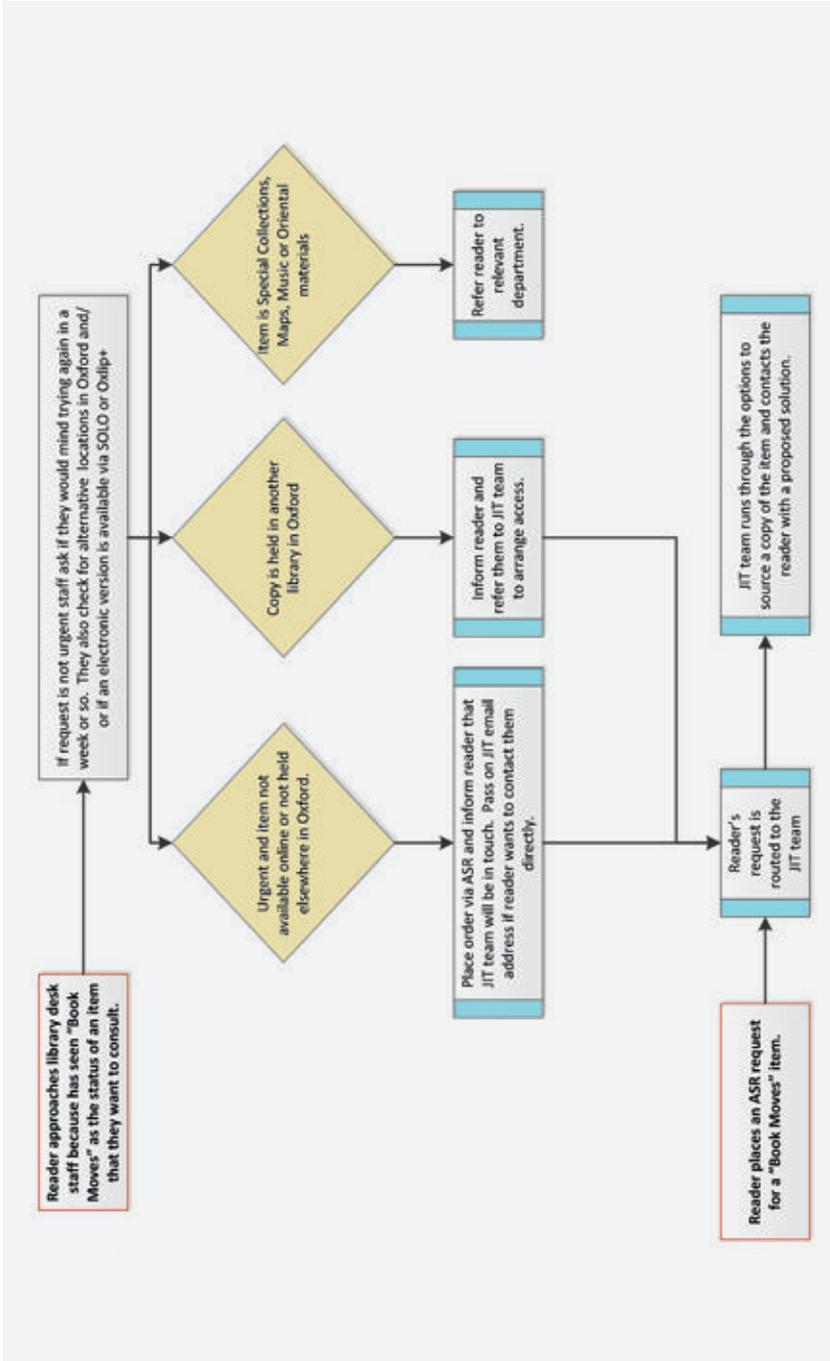
Reader approaches library desk staff because has seen "Book Moves" as the status of an item that they want to consult.

If request is not urgent staff ask if they would mind trying again in a week or so. They also check for alternative locations in Oxford and/or if an electronic version is available via SOLO or Oxlip+

Item is Special Collections, Maps, Music or Oriental materials

Refer reader to relevant department.

Copy is held in another library in Oxford

Inform reader and refer them to JIT team to arrange access.

Urgent and item not available online or not held elsewhere in Oxford.

Place order via ASR and inform reader that JIT team will be in touch. Pass on JIT email address if reader wants to contact them directly.

Reader's request is routed to the JIT team

JIT team runs through the options to source a copy of the item and contacts the reader with a proposed solution.

Reader places an ASR request for a "Book Moves" item.

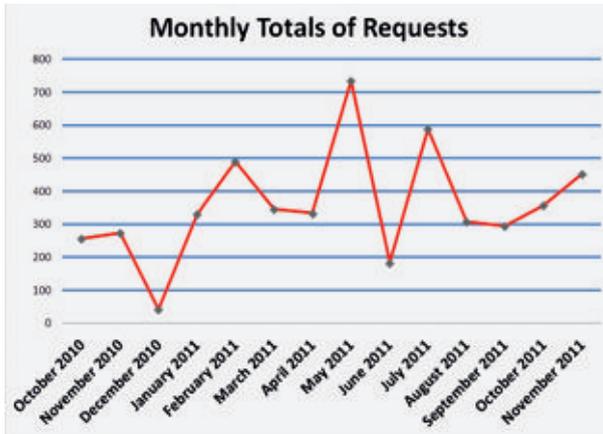**Figure 15.1:** Just-In-Time workflow
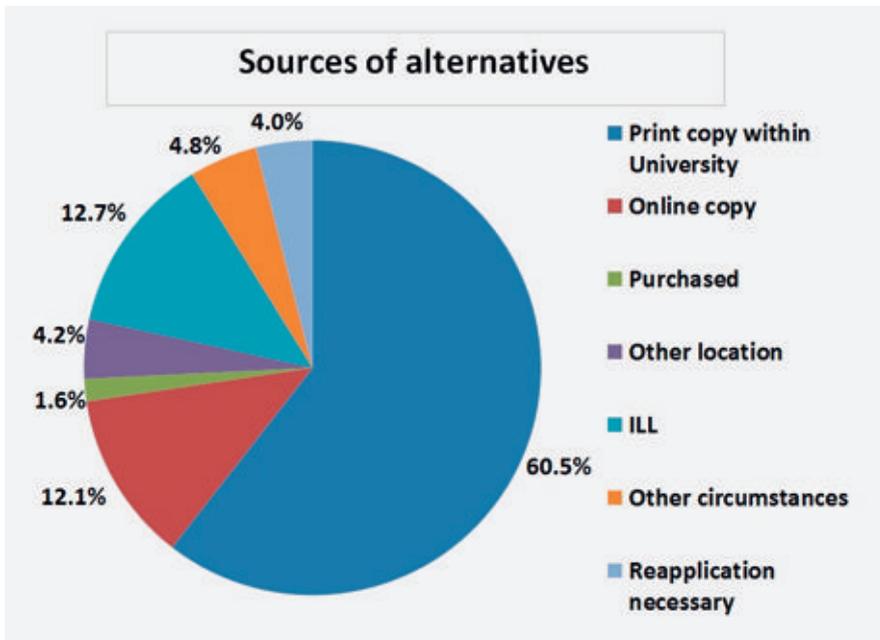
Figure 15.2: Workload of JIT requests

Figure 15.3: Sources of alternative copies

4.1 Finding electronic alternatives

The most effective route for providing alternative copies was to identify an electronic copy with direct access. OxLIP+, the Oxford resource discovery platform for e-journals and full text databases, was the starting point and yielded many results. If subscription e-resources produced nothing the search widened to the internet. By far the most productive of the freely available electronic resources was the Internet Archive (http://archive.org). Other university and library digitization projects, such as *Gallica* (Bibliothèque nationale de France: http://gallica.bnf.fr/) and *Online Books* (University of Pennsylvania: http://onlinebooks.library.upenn. edu/) provided valuable access. In total, 12.1 % of all requests were directed to an electronic copy.

4.2 Finding printed alternatives

The search extended to printed copies if electronic versions could not be found. Oxford has almost 100 libraries so it is perhaps not surprising that 60 % of the total requests were satisfied by finding another print copy within the University. The Bodleian Libraries alone contain over 2.5 million items on their open shelves. Just-In-Time developed productive contacts both within and beyond the University library system. The college libraries, which normally restrict access to their particular cohort, for the most part agreed to allow access on request. We discovered other local collections, such as the Grandpont House Library who loaned their copy of *The past & the present: problems of understanding: a philosophical and historical enquiry* which was published by Grandpont House.[2] Oxfordshire County Libraries, particularly the Oxford Central Library, were also a notable provider.

4.3 Communicating with our readers

Direct correspondence with the reader allowed the team to appreciate the immediate positive impact on the University community. For instance, the Just-In-Time team purchased *Alan Partridge: every ruddy word: all the scripts, from radio to TV and back* by Steve Coogan[3] for an English undergraduate. It was the only version

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2 Oxford: Grandpont House, 1993.
3 London: Michael Joseph, 1993.

of the primary text in existence, which was urgently needed for an extended essay worth 10 % of his final degree mark. The following feedback shows the benefit to those readers who did not have time to wait for the material to be ingested:

> Thank you for all your kind assistance! I'm only back in Oxford for a week or two, so all the alternative resources you've sent me are so useful. Please pass my thanks on to your colleagues, who have also hunted down alternate copies. I'm sure I'll be pestering you with more requests over the week, but I just wanted to let you know how much I appreciate the lengths you've been to.

4.4 ILS downtime and migration

Until July, Just-in-Time dealt with items in transit to the BSF. On average, about 320 linear metres of material were unavailable at any one time. In July it was necessary to switch off Geac Advance (the old library management system) which meant no material could be requested from offsite. To offset this disruption the bold step was taken to use Just-in-Time to mediate access. The remit was no longer limited to in-transit items but was now extended to the 7 million items held in closed stacks.

The methodology remained unchanged but more staff resources were required to maintain the service. The core team was enhanced by a four-month part-time secondment of a staff member from the Radcliffe Science Library. In addition, Just-in-Time 'champions' were recruited from existing front-line staff and a new workflow of managing requests devised. The champions were trained to conduct the necessary searches and the central team farmed out requests. The information was fed back to the central team who communicated with the reader. The experience of working as a champion was rewarding for staff and helped to reinforce Just-in-Time skills in libraries. To quote a member of staff, who was seconded to the team:

> I really enjoyed it. It was very stimulating knowing we had to find a solution for the reader in the quickest and most efficient way, and the order slips just kept on coming! It was quite intense, and I was quite exhausted by the end of each day, but with a good feeling of achievement. I slept very well, and returned each day looking forward to more challenges. I was quite pleased the downtime went on for another week, as I was enjoying it so much!

Figure 15.4 indicates the results during the downtime period. Only two requests (0.4 %) could not be mediated. In one case, the Bodleian copy was the only UK copy and the other was a thesis embargoed by the author. This success could not have been achieved without the flexibility and cooperation among individual libraries in coping with the major disruption of downtime.
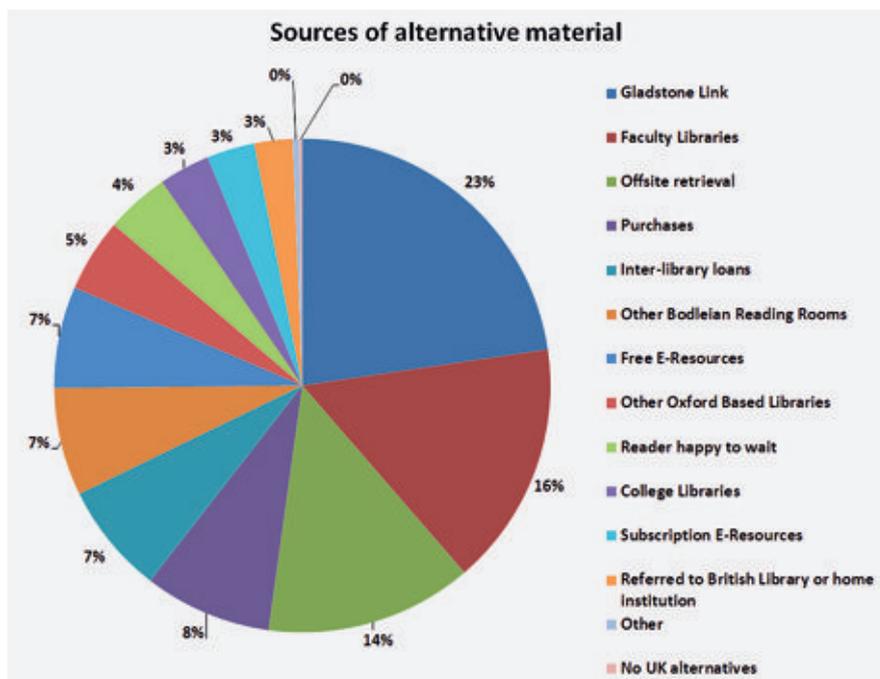
Figure 15.4: Results during downtime

4.5 Lessons learned

Between November 2010 and December 2011 over 5,000 mediated requests were processed by the Just-In-Time team, achieving 96 % success rate. The importance and appreciation of the service are obvious from overwhelming readers' testimonials. These results strongly suggest that the Bodleian Libraries should explore the incorporation of the Just-In-Time model into future core library services.

5 Services to readers: Live Help

5.1 Establishing the service

In the late spring 2011 as the ILS migration was quickly approaching the Reader Services team decided to offer a live chat known as SOLO Live Help, a live help-desk to assist readers in the use of SOLO (the resource discovery tool, providing

access to most of our catalogues and electronic finding aids), Bodleian Librar-
ies' services and locations, resource discovery and other aspects of the service
during the online catalogue downtime and transition to the new system Aleph.
In June an email call asking librarians to volunteer for a temporary SOLO Live
Help service was issued. Under the leadership of the History subject specialist
librarian a group of 13 (later 18) volunteers was recruited and trained. Because of
the pressing schedule, we made a decision to use Meebo, a free Web 2.0 chat and
instant messaging service already in use by the Bodleian Law Library. A Bodleian
Libraries' account was created and a customized Meebo widget (using only HTML
coding) was embedded on the SOLO front page. (Figure 15.5)

Transition to a new library management system in the Bodleian Libraries had
another significant characteristic. We made a strategic decision not to continue
the online catalogue but rather to concentrate on further development of the
Libraries' discovery tool, Ex Libris's Primo product known locally as SOLO.

The SOLO Live Help team and especially the team leader had a sizable task
ahead: to identify key skills required, organize documentation and information
and provide a virtual forum to acquire the skills needed.

The following key skills were identified, some initially, some later as a result
of enquiries.
– Very good SOLO skills, including basic rare-book searches;
– Good knowledge of electronic journals and the discovery systems used to
  search and retrieve them;
– Good knowledge of SOLO patron functions, knowledge of circulation and
  stack request services;
– Very well informed about general procedures within the Bodleian Libraries
  (library services, printing, passwords, Wi-Fi, databases, acquisitions and
  legal deposit), knowledge of our websites, latest news, and staff contact
  information;
– Confident;
– Able to multi-task;
– Quick typist.

The original schedule was set up requiring each person to staff SOLO Live Help
for one hour at a time between the hours of 9 am and 5 pm during Monday
to Friday. During the month of July 2011 periods between 9–10 am, 12–2 pm, and
4–5 pm were registering the heaviest usage of the service. In the three weeks
before, during and after the migration more than 370 requests were handled by
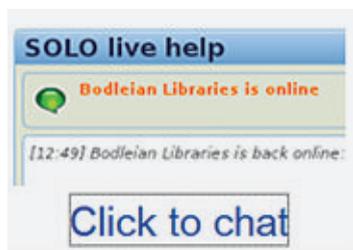the SOLO Live Help team.

Figure 15.5: The Meebo live chat widget

5.2 Lessons learned

The benefits of SOLO Live Help were threefold:

– Readers liked it as they received instant real-time and personal support even if not physically in the library. It involved little effort on their part. The placing of the service on the front page of SOLO provided great visibility;
– Staff enjoyed the experience because it brought together a varied team. They could apply their knowledge and learn from others, even in a virtual environment. Staff participating in the live chat were supported by the extensive and regularly updated Meebo ToolKit on RealSpace;
– The Aleph implementation team appreciated the feedback they received relating to readers' experiences of the new system and gathered valuable information for making further improvements and priorities.

The reception of the service was so overwhelmingly positive that when the new ILS became fully operational we decided not to withdraw the service but to retain it as a permanent feature of our services for readers. In addition to the immediate benefits, the running of the SOLO Live Help provided information that will be used in planning an ongoing sustainable service. Questions related to software features, technical details, staff skills and training needed can be answered from our experience during the project.

6 Conclusion

Reaching out to our readers through interactive services like the Just-In-Time service and SOLO Live Help met with overwhelming approval and appreciation from our readers. Building on this positive experience we are planning to extend and design further self services for our readers.

We have striven to communicate well with readers continually throughout the process; to listen to our readers; to educate them without taking too much of their time (or our own). Our community felt they were part of the transformation process and while the transformation still continues, the majority of our readers recognize our achievement and are supportive of further developments at the Bodleian Libraries.