

END OF FUNDING PERIOD REPORT

LAUC Statewide Grants, Research & Professional Development Committee

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TITLE OF PROJECT: “Give a Little Bit: Using Lean Tools to Create Efficiencies in Acquisitions and Beyond” (Presentation)

Time Period of Grant: Presentation grant for attendance at the Charleston Conference: Issues in Book and Serial Acquisition from November 2-6, 2011. Presented on November 3.

Amount of Award Received: \$500

Original Abstract as Submitted:

Faced with a higher-level imperative to improve organizational effectiveness, how do you approach that task at an operational level? What are the specific teams and skills needed to transform processes for the future?

This session will provide an opportunity to explore topics related to workflow analysis and redesign based on a Business Process Improvement effort at the University of California, Davis. Working with a consultant, a team composed of key players from acquisitions and accounting units examined ordering processes that were particularly cumbersome, eventually focusing on credit card ordering. The team learned many useful process evaluation tools including developing a “swim lane” map, cause and effect diagrams, and a variety of methods for identifying wastes and assessing customer satisfaction (or lack thereof). While some attention will be paid to the particular aspects of the credit card workflow, more weight will be given to general principles, tools, and applications to other workflows. Attendees will learn about the process analysis tools, with emphasis on the swim lane map, in enough detail to start applying them in their own environments.

I. ACCOMPLISHMENTS and EVALUATION

- Describe what was achieved during the time period of the grant.
The presentation grant allowed me to share this work at the Charleston Conference, among an audience of acquisitions and collection development librarians, and vendor representatives.

- What aspects were completed as proposed? If your study could not be completed as proposed, explain how your plans were altered.
All aspects were completed as proposed.

- Did the project accomplish what it intended? Did it make a difference?
 - Include any relevant quantitative data, if applicable (e.g. How many individuals have benefited from this project? In what way? This may include various output

measures such as circulation, reference transactions, program attendance, survey responses, etc. as appropriate.)

- Include any anecdotes, if applicable.

Approximately thirty people attended the session, which was assigned to one of the more distant rooms in the conference footprint. Discussion after the presentation was lively with good questions about application to attendees' situations. Feedback from a vendor representative was positive, and one email inquiry about our process was received by after the conference. Since the publication of the 2011 Proceedings in October of 2012, the paper has had 57 downloads, with search terms including "swimlane tool in lean method," "credit card acquisition process maps," "libraries using lean," and "lean approach to library acquisitions."

- What would you do differently next time, if anything?
I would have better anticipated submission to the conference to be able to apply for the 2010-11 grant cycle rather than the 2011-2012 grant cycle. The timing of the conference call for proposals did not match very well with the timing of the R&PD Committee's calendar.
- What advice do you have for others applying for LAUC research grants?
See above. I was grateful for the additional support to present at this conference.

II. IS YOUR PROJECT COMPLETED? Yes X No

III. FINANCIAL STATEMENT

Please explain how the funds received were spent. Attach your original budget and indicate how well your estimates matched with actual expenditures. Receipts are not necessary.

Reimbursement for travel for grant amount, with remainder covered by LAUC-D year-end funds.

Actual Expenses

Registration: **\$395**

Meals and Incidentals: **\$105**

Airfare: \$434

Lodging: \$516

Total: \$1450

IV. SHARING YOUR PRODUCT/RESULTS

What are your plans for disseminating the results of your work? If it will be a web page or product, or published article or book, when will it be available to the public? Include citations/URLs if known.

Presentation slides available at:

<http://www.slideshare.net/lspagnol/give-littlebit-spagnolnotescharleston2011>

Paper summary of presentation available at:

Lisa Spagnolo, "Give a Little Bit: Using Lean Tools to Create Efficiencies in Acquisitions and Beyond" (2011). *Proceedings of the Charleston Library Conference*. <http://dx.doi.org/10.5703/1288284314950>

V. NOTE

Information included in this report may be reprinted or posted on the web for dissemination to UCOP, other UC Libraries, and future potential LAUC grant applicants.