Case Study: Bradford College
Optimising library systems and transforming workflows

The Challenges:

- A proliferation of inaccurate management data, stifling decision making.
- Library staff unable to resolve specific system and operational problems.
- Anomalies in reservation collection sites and insufficient loan entitlements.

The Outcomes:

- An empowered library team controlling an optimised LMS.
- Specialist staff resolve known problems, review systems and provide training sessions.
- Loan and collection entitlements now meeting the needs of students and teachers.

Having operated without a full-time system manager for over a year, a number of system-related problems had arisen at Bradford College that staff could not resolve. The library team was anxious to ascertain whether these problems were attributable to Talis Alto itself, or to their use of the system.

The library had two specific concerns. Firstly, students were unable to select a preferred collection site on Talis Prism. Secondly, the library was unable to set up loan entitlements to meet the needs of all their students. The library wanted to allow a maximum of 20 loans, with a separate loan entitlement applying to a discrete collection of children's books for use by trainee teachers and childcare students.

Introducing the Business Process Review

At an account meeting, these issues were raised by Lakshmi Banner and Simon Lyes, Academic Liaison Librarians at Bradford College. A Business Process Review was suggested. Talis Business Process Reviews are thorough examinations of both systems and workflows carried out in close collaboration between library and Talis specialist staff. They can focus on known problems, provide training in agreed areas of need, and give broader reassurance that the entire suite of systems is working optimally.

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In early November 2009, the first meeting took place at Bradford College. This was a half-day training session in which the team was shown how to produce the process maps that are the bedrock of the Talis Business Process Review.

As they had been advised, Lakshmi and her colleagues first produced a series of process maps to represent current processes around diverse areas of functionality, focusing on reservations, interoperability with RFID, acquisition problems around journal ISSNs and inter-library loans. Because they wanted to cover a broad range of staff perspectives, Lakshmi worked closely with the staff-member responsible for reservations, ensuring that system staff did not make misguided assumptions about the use of Talis Alto. A similar approach was taken with other areas of functionality. Guidance on the maximum time to spend on one map ensured that the sessions were focused and did not impinge on the overall running of the library service.

Once a process diagram had been produced and agreed with all internal stakeholders, the library staff overlaid it with queries and comments. All this was shared with Talis Consultancy staff using process mapping software. A team of Business Specialists at Talis then reviewed Bradford College's flow diagrams and prepared their recommendations.

Moving into the resolution phase

The first meeting point was a webinar. Talis had colour-coded and itemised the comments and issues, making the review easier to follow remotely for Bradford College staff. Library staff enjoyed working closely with Talis Alto specialists. Lakshmi particularly recalls how friendly the first session was. "On the webinar, we could follow what the Business Specialist was doing on Alto, and we could also see our process maps. Talis staff provided solutions and occasionally offered to do some of the work for us. It was very productive." Simon Lyes sensed that the library team had been "empowered" in its use of Talis Alto.

With a second webinar, and other exchanges of information by telephone and email, all organised around the library's other commitments, Talis and Bradford College progressively moved through the problem areas of functionality originally identified. Lakshmi and her colleagues were very pleased with the level of support: "We thought it was very high. We received very good advice. The timescales were extremely flexible – in fact we had to delay the third meeting a couple of times. We were sent documents in a very timely manner. Talis staff would suggest relevant documents in the middle of webinars, and we'd receive them within a couple of days or quicker. They were incredibly responsive."

To resolve the anomalies in the reservation collection sites, a Talis Prism specialist was consulted, and Bradford College was able to reconfigure its settings to resolve the problem. And to meet their loan entitlement requirements, a Talis Alto specialist suggested adjustments to the loan types using the Configure Talis Alto application.

These two solutions highlighted more general areas for improvement – the parameters that Bradford College had in place across the system, and the proliferation of data types that had built up over the years, the latter causing information to be mis-recorded in some cases. In response, guidance on this particular area was provided by the Business Specialists during one of the sessions. The library team gradually realised the extent to which the system was under their control.

Whilst certain areas, such as inter-library loans, were not known to be causing problems, the library sought and gained reassurance from Talis staff about the processes they had in place.

Because there was no full-time system manager at Bradford College, it was agreed that the library would benefit from a System Manager Audit. Accordingly, an audit has now been scheduled and a technician will review the system and the database, ensuring that both run optimally."

The final meeting took place face-to-face. The more complex problems had by now been dealt with, and this last session, for which the Training Lead travelled to Bradford College, was to review the overall consultancy process, giving Bradford College an opportunity to provide feedback, from which future customers will benefit.

Building a lasting legacy

The business process review has delivered enduring benefits to Bradford College. The library will be using the process maps on an ongoing basis. They find the process map format to be highly suitable for user manuals, as Talis advised. The process had revealed Talis documentation that Bradford College had been unaware of, and this is now consulted regularly. Talis' written responses to individual queries have also been kept and are frequently referenced. Lakshmi concludes "We really were extremely pleased with the outcomes of this review. We found Talis' consultants and trainers great to work with. I'd definitely recommend it to other people."