



King County Library System  
Board of Trustees Retreat  
Issaquah Service Center  
10am - 2pm ♦ 1 August 2003

PANELIST DISCUSSION - 10am-Noon

Introduction

Bill Ptacek, prior to presenting Panel Facilitator, Michael Herschensohn, Director of NW Folk Life, discussed the KCLS Vision. He explained that its inception in early 2002 as a Board initiative was intended to shape and guide the Library System's practices. He used the following analogy: if the KCLS Mission Statement represents "how we're going to get there," then the KCLS Vision Statement represents "where we want to go."

When considering KCLS' guiding principles, Bill noted it's important to look outward rather than inward when evaluating the execution of such principles. In doing so, the 2003 Annual Board Retreat would commenced with presentations by a notable panel of representatives from companies that exemplify key elements of the KCLS Vision. The panelists' presentations drew parallels between their company's Vision and the KCLS Vision by presenting how they incorporate similar tenets into the daily life of their organizations. In addition, panelists were encouraged to offer their suggestions and advice to KCLS about how our Vision can help drive decision-making and continuing progress to realizing our Vision for libraries and the communities we serve.

PRESENT  
PANELISTS

Tom Barr  
Director, Hot Beverages  
Starbucks

Jonathan Landers  
Director, External Affairs  
Experience Music Project

Cheryl DiRe  
Senior Vice President,  
Community Marketing  
Washington Mutual

FACILITATOR

Michael Herschensohn

CHAMPIONS

Judy Weathers and  
Denise Siers

Georgia Lomax and  
Linda Glenicki

Laurel Steiner and  
Nancy Smith

Nancy Slote and  
Bruce Adams

KCLS Vision

*An Intellectual Adventure for Everyone  
The Heart of the Community  
We Make It Easy  
One System*



Introduction of Panelists

Facilitator, Michael Herschensohn, who expressed his belief that libraries are a cross between a place of learning and study and a community-gathering place, introduced each of the following panelists prior to their presentation.



Tom Barr, Director, Hot Beverages, Starbucks

A self-described "believer in libraries," Tom Barr emphasized that "uncompromising principles" are key for KCLS. He explained that for Starbucks (whose mission is to establish Starbucks as the premier purveyor of the finest coffee in the world while maintaining their uncompromising principles as they grow), every action taken must be driven by a purpose and fall within one or more of their "Guiding Principles."

According to Tom, Starbucks' "Guiding Principles" center around the following:

- **Partner:** Provide a great work environment and treat each other with respect and dignity.
- **Diversity:** Embrace diversity as an essential component in the way we do business.
- **Excellence:** Apply the highest standards of excellence to the purchasing, roasting and fresh delivery of our coffee.
- **Customer:** Develop enthusiastically satisfied customers all of the time.
- **Community:** Contribute positively to our communities and our environment.
- **Profitability:** Recognize that profitability is essential to our future success.

Because principles guide their decisions, Tom explained that Starbucks also has a system of “Checks and Balances,” in place to keep the organization on track. These include the following:

- Mission Review Process
- Open Q&A at management meetings
- Annual Employee Survey
- Customer Comment Review
- “Open Door” access to leadership

Tom went on to outline the customer centric *values that KCLS shares with Starbucks.*

- An Intellectual Adventure for Everyone = Excellence
- The Heart of the Community = Diversity & Community
- We make it easy = Customer & Diversity
- One System = Employee & Profitability (Sustainability)

In conclusion, Tom emphasized that for Starbucks, the main concern is the customer *experience*. He suggested that Starbucks’ motto “One Person at a time, One Cup at Time” is a translatable idea, perhaps, “*One Person at a Time, One Book at a Time.*”



Jon Landers, Deputy Director, Experience Music Project (EMP)

After a brief company overview, including the fact that EMP is a one-of-a-kind music museum encouraging visitors of all ages and backgrounds to experience the power and joy of music in its many forms, Jon emphasized that EMP’s Vision, as a fellow non-profit organization, closely relates to *servicing the public*.

Experience Music Project Vision: Experience Music Project (based on Jimi Hendrix’s concept of “Sky Church”) is to be a place to serve and inspire diverse audiences, where music and people come together for entertainment, *learning, inspiration and community*. EMP exists to *ignite the torch of passion that fuels creativity*, self-expression, and imagination in everyone we touch, *as an institution and as individuals who represent it*.

Here are the areas where Jon found common ground between the KCLS Vision and that of EMP:

- “Sparking,” or “Igniting” Curiosity and Passion = “An Intellectual Adventure for Everyone”
- Fostering “Community” = “The Heart of the Community”
- Harnessing technology to help not hinder = “We Make it Easy”
- Commitment of the institution and the individuals, or staff who represent it = “One System”

Jon’s greatest focus related to staying true to the Vision. He mentioned that Visions can be stretched to fit any idea, but they don’t always look good. He also emphasized that an organization should make sure that their Vision doesn’t blind them. He explained that, in actuality, Visions are ever-changing; organizations “should always be seeking the next horizon.”



Cheryl DiRe, Senior VP, Community Marketing, Washington Mutual

For Washington Mutual, operations require more than just a Vision statement. Cheryl explained that for her organization there are three things to examine: values, mission and Vision. According to Cheryl, Washington Mutual’s values are the “cornerstone of how [they] conduct business with customers, suppliers, employees and the community.” These values include the following:

- **Ethics:** All actions are guided by absolute honesty and integrity.
- **Respect:** People are valued and appreciated for their contributions.
- **Teamwork:** Cooperation, trust, and shared objectives are vital to success.
- **Innovation:** New ideas are encouraged and sound strategies implemented with enthusiasm.

- **Excellence:** High standards for service and performance are expected and rewarded.

Cheryl explained that the mission statement is the statement that expresses an organization's sense of purpose and meaning. She said it acts as a governing constitution by which the organization evaluates decisions and chooses behaviors. For Washington Mutual, the mission is as follows: "We build strong, profitable *relationships* with a broad spectrum of consumers and businesses by delivering the value our constituencies expect, *making customer touch-points simple and uncomplicated* and *empowering our team to do the right thing.*"

Finally, Cheryl described the organization's Vision as a brief inspiring statement that works at an emotional or visual level providing a clear achievement target for the organization and for future-oriented initiatives. Washington Mutual's Vision, "to be essential to the financial well-being of our constituencies," represents the best that they can become.

Cheryl emphasized that the customer experience must fit the brand, values, mission and Vision. She also stressed that much of the customer service performed via branch staff, must result from leadership. As a key part of the mission and Vision, Washington Mutual strives to recruit and train Senior Leaders with some of the following qualities and behaviors: strategic and broad, clearly capable, decisive "can do" attitude, resourcefully innovate and flexibly adapt, build teamwork, coach, delegate, and ensure performance.

From valuing community involvement to defining the role you fill as organization, Washington Mutual hardwires the "what you do," "for whom," and "how" into these statements.

#### Q&A from Audience

**Q: How do your organizations convey to your employees that they are respected? How do you foster "open door" policies?**

**A:** The panel explained that this process starts with leadership acknowledging that everyone makes mistakes and by accepting employee input as non-threatening. In order to encourage employees to share their views and opinions, it may also be advisable to make available an anonymous form of input, especially for sensitive issues. For example, when distributing and collecting employee surveys, empower a group of employees outside of management to oversee the process. In addition, it was suggested that management continually walk around the organization(s) and be amidst its employees.

Cheryl commented that at Washington Mutual, there are two things that are not tolerated: 1) Arrogance: Especially among upper management; 2) Dead Mice: When employees present a problem it should be on the following basis: "Here's the problem, this is what I think we can do about it," rather than "Here's the problem, what are you going to do about it."

**Q: What strategies do your organizations use to transfer your Vision to the customer?**

**A:** Panelists explained that communication is key. Employees need time to hear, understand and practice using the message. Management can also lead by example. At Starbucks, the "Walk in my Shoes" program often gives management the opportunity to work with employees to both lead and understand their perspectives. For the most part, however, employees must understand the Vision and the mission to achieve it. As modeled by leadership, with respect and patience in teaching, employees should be able to convey an organization's Vision through their interactions with the customer.

**Q: What do your organizations do to make your employees aware of, and knowledgeable about, the mission and Vision?**

**A:** All panel members emphasized the need to have such statements readily publicized within the organization (from poster or flyers in employee common areas, to printing it on the back of employee discount cards and comment cards). It was also recommended that statements made at employee meetings or group events always relate back to a portion of the Vision.

**Q: Is there any value in knowing the name, and/or speaking the name, of the customer.**

A: The panel discussed the value of strong relationships over specifics. For each organization represented, the relationship between employee and customer via customer service gives customers a feeling of ownership or belonging. According to panelists, it is the creation of that relationship that demonstrates that you are creating an inclusive environment, which the customer views as part of their community and home.

## KCLS CHAMPION PRESENTATIONS - 12:30-2pm

### ► Judy Weathers and Denise Siers: Welcoming Library

In Judy's absence, Denise presented the Welcoming Library Project to the Board as a project that lays the foundation for the other three customer service projects. According to Denise, the Welcoming Library is a functional physical place that should create in each library an environment that welcomes customers and enables them to identify and use all of KCLS services with "ease."

Denise emphasized that when customers enter a library they should be able to readily identify: 1) where major collections are located; 2) how staff can be of assistance in meeting their information needs; 3) how the catalogs and the computers might facilitate their visit; 4) where they can borrow library materials.

Denise explained that the Welcoming Library Project is working to eliminate physical and physiological barriers to "intellectual adventure" by employing the following methods:

- Implementing consistent signage and labeling system wide
- Identifying physical barriers to a welcoming library
- Evaluating each library with a buildings checklist (i.e., providing locator maps, adequate lighting, clear lines of sight and traffic flow)
- Enhancing comfort for customers by adding beverage and snack "cafés"
- Stimulating interest by developing eye-catching displays, bulletin boards, electronic design screens and providing the "how-to" training for staff
- Supporting express checkout expansion with staff training
- Facilitating holds collection

In its second year, the Welcoming Library project continues to "make it easy" for patrons while developing a consistent, visually exciting look throughout "one system."

Following the presentation, Charlotte Spitzer asked if there have been any complaints thus far. Denise explained that while staff members have lobbied for services, such as the vending cafés at Mercer Island, those staff members have insisted upon creating isolated areas for various activities. Currently, there is a "noisy area" (with vending machines, couches, etc.), as well as a separate "quiet" area to accommodate other activities with the intent that the users of one area do not infringe upon other patrons.

The group went on to address additional issues. Bill reiterated that the library environment must be altered in order to stimulate people and create "An Intellectual Adventure for Everyone;" however, he acknowledged that this venture is an "art form" and requires thought. He stressed that KCLS wants to create a look and feel among the 42 libraries.

Tobias Washington, who acknowledged that what we're doing is not "out of step," emphasized not becoming too arrogant in innovation, but maintaining the ability to step back and welcome customer reactions, etc. Charlotte Spitzer added that without flexibility, it would be difficult to benchmark this project.

Jim Grayson asked whether there was a concern regarding the comfort of the area and whether it could result in a group of patrons tying up the facilities for long periods of time. Denise acknowledged that it has been a general concern to staff, but for the most part patrons appreciate the service and only a small section of population use it inappropriately. Nancy Smith added that the revised Rules of Conduct, approved by the Board, give staff more leverage to deal with those as individual issues.

## ► Georgia Lomax and Linda Glenicki: Customer Service

Spawned from participation in the Urban Libraries Council Executive Leadership Institute (ELI) grant, Georgia explained the realization that “customer service” is part of everything we do at KCLS and everything we do affects our ability to provide customer service. Hence, the customer service project focused on the following characteristics:

- People not tasks.
- Create opportunities for quality patron and staff interaction.
- Create opportunities to help patrons.
- Offer help where it’s needed.

In order to “Make it Easy” for KCLS staff to provide excellent service to its patrons, and for patrons to use the wealth of services and resources made available to them by KCLS, she detailed the initial months of brainstorming and discussion with front-line branch staff (guided by the KCLS Vision Statement). The resulting themes included:

- Involve staff at all levels in implementation and planning of projects to better communicate upcoming changes, and to use the knowledge and expertise of staff that would be introducing patrons to the service and providing it.
- Provide clear direction regarding desired “outcomes” to guide staff in developing a service that works within the diversity of the System, and allows both consistency and local discretion as appropriate.
- Identify related projects and bring them together so changes and services do not seem piecemeal.
- Staff members want to spend their time helping patrons but become overwhelmed with the many necessary and important tasks involved in keeping a library running smoothly and efficiently.

According to Georgia, three current projects related to customer service and fulfilling the Vision Statement were identified to address these themes: Self-Checkout, Roving Reference and Welcoming Library. Subsequently, a “leadership component,” based on the fellow/sponsor relationship in the ELI program, was added. APT appointed three managers/assistant managers to lead the projects in association with an Associate Director. These “champions” attend APT meetings and were liaisons to administration for increased communication from the branches.

Georgia outlined other activities executed during the ULC project including providing customer service training in conjunction with implementation of a service, planning for a future customer service “certificate” that staff can earn by completing an established curriculum and, conducting a survey to gather patron input regarding customer service provided in KCLS libraries. She stressed that although the 10-month ULC project is over, customer service innovation, commitment and focus will continue in the ongoing work of KCLS staff.

Georgia told Board members that one of the greatest issues with customer service is consistency (in relation to rules, facilities, etc.) and that much of this revolves around hiring the **right** people. She expressed that KCLS ultimately should accommodate patron needs: 1) teaching versus doing; 2) helping versus leaving alone; 3) frequent versus infrequent users. Finally, Georgia stated that if KCLS can find alternative ways to free up staff’s time (centralize, technologically), this allows them to focus on the patrons rather than their day-to-day tasks.

Bill Ptacek went on to refer to high marks in the recent Hebert Customer Service study and that such success masks whether or not we striving for a higher potential (making it harder to determine where we could or should improve). Charlotte Spitzer added KCLS should to carefully judge where we spend our time in order to determine where time spent is unproductively. She felt the idea of having an external network, or someone to call for ideas, is valuable.

Wai-Fong Lee also mentioned that as KCLS progresses, there will be fewer libraries to benchmark against and that she appreciates the use of a business environment for comparison. She wondered how we can build an environment in which staff acknowledges there’s always room for improvement.

Tobias Washington acknowledged that KCLS staff members should never assume they know what customer service means, but rather continually return to ask the customer what are we doing best and where can we improve. Changes made in this area should be made in accordance with patrons’ desires.

James Grayson added that a critical component of customer service has to do with how an employee feels when they get to work and how they feel about what they do. If they're not happy, their response to customers will be visibly strained. Georgia agreed that happy staff provides good service, and that for KCLS, the staff appear to have a consistent and solid view of their role for customer service.

► **Laurel Steiner and Nancy Smith: Self-Check Out**

In Laurel's absence, Nancy outlined the Self-Checkout project, stating that it encompasses the way KCLS assists patrons. The focus of her presentation described the current need for an excellent level of service in lieu of increased demands by the public on the staff.

According to Nancy, when challenged to balance the completion of tasks with the Vision of quality time to interact with patrons, the implementation of new technology allows for adaptations to workflow and workload. Nancy also emphasized that self-checkout stations provide an additional service option for KCLS patrons by increasing the service points in the library and allowing staff to focus on customer assistance: finding material in the library, explaining self-checkout and holds and how to utilize other technology resources.

Nancy explained that a system wide implementation plan is in place for self-checkout and that training has been developed to provide staff with the tools to incorporate this new service in their libraries. Managers, Lead Library Assistants, and Library Technical Assistants are required to attend; however, all staff members are encouraged to attend. Self-checkout modules are installed in regional clusters (since many patrons use more than one library in their geographic area).

According to Nancy, all the libraries will have self-checkout by March 2004. She also mentioned that self-checkout stations are currently installed in Auburn, Covington (1 unit), Federal Way Regional (Codeco), Federal Way 320<sup>th</sup>, Lake Forest Park, Library Connection @ Crossroads, Maple Valley (1 unit), Sammamish, Shoreline, Valley View (Codeco), Woodinville, and Woodmont.

Nancy went on to detail the following issues regarding Self-Checkout:

- Initial staff concerns regarding the potential elimination of their positions.
- Staff feared that they would be asked to do something they weren't trained to, or weren't prepared to do.
- The physical limitations of moving rising hold volumes from the back to the front (space, privacy and theft of CDs and DVDs).

Nancy concluded by stating that staff concerns have, for the most part, been resolved as they find that even away from the desk, they encounter many of the same questions as before. Bill Ptacek added that the workload on the floor keeps staff busy. James Grayson added that our obligation is to be ready to work with the public whether in front of or behind a counter.

► **Nancy Slote and Bruce Adams: Reference**

Nancy explained that KCLS' conventional model for providing reference service in the branches has been to locate that service at a desk. Experientially, however, we know that patrons often need help away from the desk. According to Nancy, the pilot's goal was to experiment with and design staffing models to provide service at our patrons' point of need through roving reference staff. The following questions were raised:

- How can we "make it easier" for our patrons to get the help they need, where and when they need it?
- Will roving reference increase our contacts with those who do not regularly approach the desk for assistance?
- How can we approach patrons without infringing on their privacy? Are we disturbing them when we approach them proactively?
- What kind of wireless computer access and other support will be useful for staff away from the desk?
- What kind of central desk will be useful in the future? What kinds of services should we offer at an identified reference area? What will it look like physically?

Nancy detailed the staffing model in which "rovers" are designated for scheduled intervals while a secondary reference librarian works the desk. She also showed Board members the newest wireless computer tablets to be used in the stacks for catalog access by staff and patrons.

At this time, Nancy said that the project involves 5 pilot libraries of different sizes: Boulevard Park (medium), Lake Hills (large), Shoreline and Fairwood (resource), and Kent (regional). Each library will experiment with different staffing models to maximize roving staff on the floor.

While Nancy acknowledged there is always a voice in the back of a reference librarian's head saying, "I've got to get back to the desk," the concern with helping patrons where they need help, or especially for those who are uncomfortable approaching the desk, overrides such qualms. Patrons not only save time and appreciate direct help, but also the service improves interaction with those patrons.

Wai-Fong Lee asked what sort of security would be in place for the reference desk and the wireless tablets. Jed Moffitt explained that the wireless tablets are thin client (without a hard drive) and that the equipment would prove useless outside the library environment. Nancy Slote added that the staffing model would always include a librarian at the desk, as well as one or more "rovers."