



January 15, 2021

**To: Plymouth District Library Board**  
**From: Carol Souchock, Plymouth District Library Director**  
**Katie Page, Technical Services Coordinator**

**Re: Curbside Service Improvement Plan**

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As Katie, our Technical Service Coordinator, shares in her attached proposal “it has become obvious to staff and patrons alike that the library’s curbside service is falling short of our high customer service standards. “  
“The ultimate goal is to reach a place where we have adequate staff time to prepare appointments, reduce staff stress, improve library morale, and of course, resulting in happy and satisfied patrons.”

Katie has taken the lead on planning curbside service, since curbside was first implemented in the summer of 2020. She designed our service plans with assistance from our leadership team and circulation staff. Implementations of these plans are being completed with the support of all Plymouth District Library staff.

I would like to acknowledge the consideration and effort put into this planning by Katie and the wonderful job the circulation staff have done in implementing these plans. As well as the support provided by all library staff.

We always try to focus on how we can improve our services, adapt, and respond to current needs. That is what we have done throughout this process and will continue to focus on.

We have over 500 items being requested each day which results in approximately 850 customers a week seeking appointments to pick up materials. To full fill these requests we have to continue to expand our capacity.

The attached proposal, which I support, will get us to the level we need to provide prompt service while continuing to maintain safety for our patrons and staff.

We have started implementing these recommendations and have already seen a significant improvement in wait time. Continuing to implement the action items below and detailed in this proposal will get us to the level of response required to meet demand soon.

### **Where were we in November and where are we today?**

Early on we providing 336 appointments a week with two tents and as of the current week of January 18 – 23 are now providing 570 appointments a week.

**How have we increased capacity so far?**

Expanded hours of service: adding appointments from 10 am – 12 pm and 7 - 9 pm Monday – Thursday.  
Added two additional tables (previously tents)  
Added additional staff hours for implementation

**Next we will:**

January 18 – 23: expand red table service hours to 7 pm resulting in an additional 28 appointments a day or 112 week.  
Followed by further expansion of red table service hours to 9 pm resulting in 8 additional appointments a day or 32 per week.  
Followed by increasing the number of appointments on all three main tables to 5 appointments **an hour**, this figure can be increased if needed.

All of this will be accomplished by increasing staff hours devoted to the process.  
Doing so is possible through the creation of work areas throughout the main floor of the library which help isolate staff from each other.

**What are the challenges to maintaining these service levels?**

Sufficient staff available to fulfill these service hours.  
We are seeing an increasing number of staff who need to quarantine at home due to potential exposure.  
While our front desk circulation staff fills our primary curbside staffing needs we have built into place a backup staffing plan with the use of our backroom circulation staff and others.

**Next steps?**

**Include potential set up of curbside pick-up on demand (without appointments) on the porch** of the library from 10 am – 12 pm Monday – Saturday. This will be accomplished by relocating staff and with the purchase of additional safety and circulation equipment. Planning for this is taking place at this time as we seriously consider this option.

**What else is being considered?**

Using more efficient appointment software and adding a pickup option via our app.

**What about allowing in building hold pick-ups?**

Our leadership team has seriously considered this possibility but feel it is not a practical option at that time. In addition doing so increases the possibility of the library occurring a building wide shut down of service as experienced at other libraries. Our goal is to maintain service without disruption.

## **Proposal for Curbside Expansion**

- I. Analysis of current curbside workflow**
- II. Proposed changes**
- III. Proposed phased implementation**
- IV. Further avenues to consider**
- V. Preliminary clerk schedule**

It has become obvious to staff and patrons alike that the library's curbside service is falling short of our high customer service standards. I am deeply grateful to our staff for the incredible job they have done this year under these difficult circumstances. But I believe we would all agree that it's time for us to look carefully at our curbside service, re-evaluate our procedures, and make necessary changes.

This proposal looks at our current situation, considering both the hard data and the personal impact on our patrons and staff, and proposes changes that will allow us to continue providing curbside service in a way that is sustainable for a long-term period.

Thank you to Carol and the Board for considering these changes.

Katie Page

Technical Services Coordinator

January 6, 2021

## **I. Analysis of current curbside workflow**

### **Current procedures**

This is a rough summary of the curbside process for patrons:

1. Patrons place a hold on one of our items.
2. The item is checked in and becomes available for them, triggering a notice to be sent to their email or phone.
3. The notice contains instructions for scheduling a curbside appointment at the library via Calendly.
4. Appointments are scheduled in 3 different spots (the red, blue, and white tables) on the library front porch. One person is scheduled per 15-minute period. They arrive at the designated time, and pick up their checked out item from the appropriate table.

This is a rough summary of the curbside process for staff:

1. An item with a hold is checked in and placed on the hold shelf under the patron's name. (This step of the process is currently coordinated between reference, circulation, and page staff.)
2. Every day, circulation staff run a list of the appointments scheduled for the next day. They pull these holds from the hold shelf.
3. Circulation staff check out each hold to the patrons in question, and organize the appointments for the next day. This is by far the most time-consuming part of the process (discussed below).
4. Circulation staff place the appointments out at the tables in 15-minute intervals.

The curbside process also includes many other activities essential to its operation:

1. Pulling desired items from the shelves via the pull list – primarily handled by reference staff at the moment.
2. Helping patrons schedule appointments, primarily over the phone. The Covid supervisors (administrative team) do the bulk of this work, with circulation staff helping out as they have time.
3. Troubleshooting problems with holds, appointments, etc. Both the circulation and the reference staff answer patron phone calls and emails, and both work to solve these problems.

## The hard data

I'm going to focus on the data that we have gathered over the past month, gathered since the library closed the building to the public in late November. I am going to disregard our curbside data from the summer shutdown, as it operated under vastly different circumstances, and the demand for curbside service during that time was a small fraction of the demand we're seeing right now.

On average, we consistently have **800-900** patrons whose holds become available for them every week. (I am concentrating on the number of individual patrons involved, not the number of items on hold, which can vary widely by patron and is ultimately irrelevant for determining how to schedule pickup times.)

As of January 4, 2021, we currently offer **512** appointments available for pickup weekly.

Obviously, since we're only meeting about half of the demand for item pickup, the backlog of patrons who are unable to pick up their hold accumulates daily. Eventually, we find ourselves in our current situation, where our patrons are waiting an average of **2.5 weeks** to pick up their hold. The average wait time will continue to increase, unless we aggressively expand our curbside service. Otherwise, we remain trapped in a mathematically impossible situation.

Staff time is another important part of this equation. In our current curbside model (based on our experience over the past month), it takes approximately **12-16 hours** of daily staff time to prepare appointments for the next day. (If this doesn't make intuitive sense, picture it as a very long stream of circulation transactions – a line of patrons that starts at the circulation desk and wraps out of the building and down the block. Without the buffer of self-checkout, our circulation staff are processing many more circulation transactions daily than they would if the building were open.)

We are currently understaffed even for our current curbside operation, and we sometimes struggle to finish appointment preparation. This has caused a level of stress and anxiety for the staff which I find increasingly concerning. Extrapolating from our current data, I estimate that it will take **20-25 hours** per day for appointment preparation at the end of Phase Three implementation. The ultimate goal is to reach a place where we have adequate staff time to prepare appointments, reducing staff stress, improving library morale, and of course, resulting in happy and satisfied patrons.

## II. Proposed changes

### Procedural changes

1. Appointment times: move from 15-minute to 1-hour interval pickup times
  - a. Patron convenience: gives the patron a larger block of time to pick up their material
  - b. Reduces staff time putting appointment items out for pickup, allowing them to focus on appointment preparation
  - c. **Most importantly: this method allows us to easily make adjustments based on demand.** Calendly allows us to scale up and down as desired: we can gradually increase the number of appointments per hour, starting at our baseline of 4 appointments per hour, and increasing or decreasing based on demand and/or staff availability.
  
2. Increase in curbside hours and pickup “spots”
  - a. We have already started this process, increasing our hours on Monday-Thursday from 12-7pm to 10-9pm
  - b. This week, we added a third bookable curbside “spot” (currently represented by the white, blue, and red tables on the front porch), as well as a separate pickup table for miscellaneous pickups like craft kits and book club books, which further reduces strain on the main curbside system
  
3. Staff time in building
  - a. We have already established **four** circulation curbside preparation stations, each prepped with all of the software and equipment we need to check out items, appropriately spaced out from each other according to Carol’s safety guidelines:
    - i. **Waldorf room** (main center of curbside operations)
    - ii. **Circulation desk**
    - iii. **Reader’s Advisory desk**
    - iv. **Workstation in Teen Zone**
  - b. We will significantly expand the work schedules of the circulation team, who are the staff members with the skills and experience to handle every aspect of the curbside process in the most efficient and effective way
  - c. We will also to continue to explore contributions that other departments can make to the curbside process; however, I’m hoping that implementation of this proposal frees up other departments to focus on their own work

### **III. Proposed phased implementation**

#### **Changes implemented this week:**

- Additional bookable pickup spot (red table) and miscellaneous pickup table
- Expansion of curbside service hours (increase of **128** appointments per week)

#### **Phase One: Increase to 696 weekly appointments**

- Increase of circulation staff hours through implementation of new clerk schedule (see section V)
- Implementation of new appointment intervals (from 15 minutes to 1 hour)
- Expansion to full service hours for third pick up spot (adding 232 bookable appointments per week)

#### **Phase Two: Increase to 754 weekly appointments**

- Evaluation of success of Phase One.
- Increase number of appointments for one table to 5 appointments per hour (adding 58 bookable appointments per week)

#### **Phase Three: Increase to 812 weekly appointments**

- Evaluation of success of Phase Two.
- Increase number of appointments for another table to 5 appointments per hour (adding 58 bookable appointments per week)

#### **Ongoing**

- Evaluation of patron demand and staff ability to meet that demand. The primary sign of success will be the circulation department's ability to complete curbside appointment preparation in a timely manner, considering the increased number of appointments. Finishing preparation by the late afternoon and/or being able to spend circulation staff time on the hold pull list, reducing strain on the reference staff, would be clear signs of success. (Reduction in patron dissatisfaction is another highly anticipated sign of success!)
- Scale number of appointments per table up and down accordingly

#### **IV. Further avenues to consider**

The main advantage of expanding the current system is that patrons and staff have had a great deal of time to use and become familiar with the process. Adopting a new service model would require training for patrons and staff. Some other options that we are investigating:

##### **Different options for booking curbside appointments**

We are looking at two products that integrate with our library system, which would simplify some aspects of this workflow. We are considering **Capira Curbside** (this would require purchase), an appointment booking system that integrates with our system. This could partially or totally replace Calendly. We need to gather more information on this new product and seek some feedback from other libraries who are successfully using it with a SirsiDynix library system.

##### **On demand service**

The second product has been built into the app we already use (SirsiDynix's BC Mobile): **Click and collect**. This facilitates on-demand curbside service. I'm keeping a close eye on the development of this product; since it has just launched, the developer is working hard to make improvements based on customer feedback. In my opinion, it's too early to consider adoption of this model, but we should keep it in mind as an option. It has the advantage of being free for us to implement, and it would be integrated into the library app that many patrons already have installed on their devices.

We also have the option of rolling out our own on demand service, simply based on taking phone calls and running the desired holds out to the patrons. Considering the additional strain and pressure this would place on staff, and the incredibly high demand we are currently facing, this option is not optimal. However, we should keep this general concept under consideration. Some libraries (Canton is a local example) have successfully implemented both an on-demand system and a more traditional curbside service system.



### **Patron access to hold shelf**

Some libraries have created a limited space within their closed buildings which gives their patrons access to hold material. In our case, we would need to provide access to our hold shelves (can be transitioned to mobile shelves and placed elsewhere in library) and our self-checkout machines.

However, I hope that this document has shown that circulation transactions are not often simple and clear-cut. We would still need dedicated circulation staff available at all times to handle a wide range of problems that regularly occur, as well as additional staff for crowd control. I would like to keep this option on the table, but due to safety concerns and the vast overhaul of library space and staff workflow that this would require, I would like to give this option a great deal more thought and gather more feedback from other staff members. It does not seem realistic for us at this moment in time.

## V. Preliminary clerk schedule

**Notes on schedule:** This preliminary schedule uses our existing regular clerk schedule as its base. All clerks are at 100% of their normally scheduled hours. The timing of the shifts is less important to me than the fact that we have the daily hours to cover the anticipated workload for expanded curbside service. Thus, I'm using the original schedule, which I hope will provide a small return to normalcy for the staff. (It also has the added benefit of knowing that the staff is available to work these hours, reducing the need for schedule negotiation or shift switches.)

It is color-coded based on the location of the clerk in question, to make sure that employees are working safely in geographically separate spaces. We don't need all workstations covered at all times (except for the Walldorf room), the intent is simply to have a range of work spaces available.

- i. **Walldorf room** (main center of curbside operations)
- ii. **Circulation desk**
- iii. **Reader's Advisory desk**
- iv. **Workstation in Teen Zone**

The clerk stationed in the Walldorf room will be responsible for bringing out curbside appointments hourly. They can spend the rest of the time in curbside preparation.

Additionally, there are backroom clerk shifts scheduled for our clerks who handle the vital operations of acquisitions, cataloging, processing, and MeL interloan. Backroom clerks also answer patron phone calls, cover curbside staff breaks, and serve as a backup emergency curbside staff member. **Backroom shifts are color-coded in purple.**

Backroom clerks work in the staff area of the main level, and Carol has requested that we limit staffing in this area to one person. When there's a need for backroom clerks to work at the same time, we will designate alternate working spaces to ensure that employees are spaced apart appropriately.

We have an immediate need for this on Tuesdays, when I've scheduled Karel Neubacher as an additional backroom clerk, in an effort to give her enough time each week to devote to her normal duties. We will work with her to find another workspace for this shift.

Circulation supervisors (Linda Vanderlaan, Cassie Cobb, and myself) have a shift scheduled daily to help coordinate the curbside process. These shifts are not covered by this schedule.

We will adjust the timing of specific shifts as requested, to fit into the grand scheme of staff schedule layering.

## Week One

Circ Clerk #1		9-1	1-5		1-5	
Backroom Clerk #1	12-5	10-3		4-9		12-5
Backroom Clerk #2	9-2	4-9	11-4		9-2	
Backroom Clerk #3	3-9	9-3		9-3	9-3	
Circ Clerk #2						1-5
Circ Clerk #3	5-9	1-5	5-9	9-1	9-1	
Backroom Clerk #4	9-2	4-9	9-2			9-3
Circ Clerk #4	5-9	5-9	5-9	5-9	1-5	
Circ Clerk #5	9-1	6-9	9-1	9-1		9-1
Backroom Clerk #5		11-5	11-5			9-3 **
Circ Clerk #6			11-3			1-5
Circ Clerk #7	1-5			1-5	1-5	
Backroom Clerk #6		9-3	3-9	11-5	11-5	
Number of hours dedicated to curbside	26	24	26	22	21	18

## Week Two

<b>Circ Clerk #1</b>		9-1	1-5		1-5	
<b>Backroom Clerk #1</b>	12-5	10-3		4-9	12-5	
<b>Backroom Clerk #2</b>	9-2	4-9	11-4			12-5
<b>Backroom Clerk #3</b>	3-9	9-3		9-3		9-3
<b>Circ Clerk #2</b>						1-5
<b>Circ Clerk #3</b>	5-9	1-5	5-9	9-1		9-1
<b>Backroom Clerk #4</b>	9-2	4-9	9-2		9-2	
<b>Circ Clerk #4</b>	5-9	5-9	5-9	5-9		1-5
<b>Circ Clerk #5</b>	9-1	6-9	9-1	9-1	9-1	
<b>Backroom Clerk #5</b>		11-5	11-5		9-1	
<b>Circ Clerk #6</b>			11-3		9-1	
<b>Circ Clerk #7</b>	1-5			1-5	1-5	
<b>Backroom Clerk #6</b>		9-3	3-9	11-5		11-5
<b>Number of hours dedicated to curbside</b>	<b>26</b>	<b>25</b>	<b>26</b>	<b>22</b>	<b>21</b>	<b>17</b>