

A library Business Partnership Agreement (BPA) Gillian Laughton

Presentation for the Australasian Libraries in Emergency Services (ALIES) Conference April 2009.

Outline

My presentation covers a client library needs and usage analysis project that we undertook in late 2008 within the confines of a Business Partnership Agreement.

I plan to cover some history of how we got to undertake the project, then some detail on the project itself. Why, how and some discussion of the findings and outcomes. I also want to cover our plans for the future, having completed the actual project

History

The old Department of Social Security was split in 1997 into the core policy department and a service delivery arm, Centrelink. The existing Library and its collections, which had its origins in the 1940s, remained with the policy department.

The policy department kept the Social Security name for some months then became Family and Community Services. Over the years subject areas have been added, but the core areas of interest have remained fairly stable. Indigenous Affairs was added formally in 2006 and Housing was added with the current Government making the acronym FaHCSIA with an H.

Services are provided to several client agencies within the FaHCSIA portfolio under varying types of agreements. These agreements are established to suit the circumstances and needs of the individual agency.

For Centrelink; an agreement was reached in 1997 between the then Secretary of DSS and the CEO of Centrelink that Centrelink would continue to have access to the Library Service and it would be covered in the initial Business Partnership Agreement for a period of 3 years.

The agreement between the two agencies has continued under various formats and names. Our protocol within it is unusual in that FaHCSIA is providing services to Centrelink. Generally it is Centrelink providing services for, or on behalf of FaHCSIA. The current detailed BPA Library Services Protocol was developed following a review of Library Services to both agencies in 2006.

To give a feel for numbers, Centrelink would have approximately 5 times the number of staff that FaHCSIA does. However many Centrelink staff work in customer service or call centre roles where their information needs beyond what is provided within Centrelink are minimal.

During 2008 Centrelink moved in to it's own 'headquarters' building named the Caroline Chisholm Centre. It is located next to the main FaHCSIA site in the Tuggeranong Town Centre in Canberra.

Current Agreement

The current agreement is due to expire in 2010. The Library Services protocol enumerates a range of core services and extended services. The charges/costing for the services varies according to the category.

Examples are: Standard services include access to the collections, both physical and virtual, whereas extended services include the preparation of detailed research bibliographies.

There are detailed reporting requirements specified for each area of Library activity. Reporting is done quarterly, in line with the reporting requirements of the overall BPA. This is done with detailed statistics for all activities. A discussion takes place after the reports are exchanged, which provides a strong communication mechanism.

Client Service Improvement Project for Centrelink

The purpose of the project, as given in the slide was to gather feedback to tailor and improve library services to Centrelink.

The provision of Library Services has evolved as the relationship between the the two agencies has developed. It is to be expected that the needs of Centrelink staff will have changed over the 10 years of it's life.

There was evidence, in the form of usage statistics, that demand has increased over time, Also clients seem 'satisfied' with services delivered, according to the feedback received.

However, at regular BPA business meetings, questions were raised by managers in both organisations during 2007, and early 2008. These included ;

1. Were the information resources aligned with the business needs of Centrelink staff?
2. Were the services provided appropriate for the 'new' Centrelink?
3. Were the service delivery methods, user friendly and efficient?
4. Were current performance measures and management information providing a 'true picture' of the usage trends and gaps?

The project required no extra capital outlay and collegiate agreement was reached to resource the project from existing staff and infrastructure budgets. The FaHCSIA staff moved into the Caroline Chisholm Centre on the 13th of October 2008 for 3 months finishing on the 23rd of January 2009.

Why was the project needed?

As mentioned already BPA Quarterly Business Discussions confirmed that the library services provided to date have met Centrelink's expectations. In this project we wanted to investigate the information and library needs across a broader cross section of Centrelink staff including non-users.

The project was designed to use a wide variety of evaluation methodologies to assess the client usage and appreciation of current services

Planned benefits and outcomes:

Identification of stakeholders from business, communications and IT in Centrelink.

A clearer understanding of the library and information needs of key user groups and individuals within Centrelink.

Develop an understanding of business requirements for library and information services within Centrelink.

Further development of the BPA and other related strategic documents in the light of the findings.

Definition of integration points with Centrelink IT.

Definition of support processes including issues management and change management.

Business case for changes to current services and protocols developed.

Client Service Improvement Project for Centrelink

Sought feedback via surveys and discussion

We ran 2 surveys using an online survey tool called Survey Monkey.

The first survey was a general one that was widely promoted via the Shopfront and articles in Centrelink staff newsletters. The purpose of this survey was to gather evidence about the usage and awareness of library products and services by Centrelink staff.

The survey was open to staff between the period 12 November 2008 and 28 November 2008. A total of 499 staff responded to the survey with a completed response rate of 75%. We were very happy with the mix of respondent's locations, work levels, and type of work undertaken. We were also happy with the mix of current and former library users and those from non-users of the library. This survey in itself provided an awareness mechanism in which a number of responders expressed a desire to learn more about the services.

A second survey was carried out covering the specialised current awareness alert prepared daily for Centrelink staff called not surprisingly Centrelink Alert. It has not been strongly marketed within Centrelink for a variety of reasons, and this was the first opportunity to ask questions of recipients as to its usefulness.

This survey was totally online and the link was directly emailed to alert recipients within Centrelink. Of the 113 staff invited to complete the survey, a total of 58 responses were received of which 49 responses were completed.

We held a discussion group meeting with staff nominated by their Divisional Manager as a representative for their Division or Area. All divisional representatives were invited to a discussion on 26 November, 2008 to discuss their awareness and usage of library services and to further explore some of the themes which were identified by the Centrelink staff survey on library usage. Representatives located outside of National Support Office (NSO) were invited to participate via a phone hook up. A total of nine representatives attended the meeting, six from National Support Office and three located in the Area Offices.

Shopfront in Main Street at Caroline Chisholm Centre over lunchtimes

A Centrelink Shopfront was established between October 29, 2008 and November 28, 2008. It replaced the original concept of themed expos during the course of the project. Due to the limited nature of this display stand, Library staff were only able to talk to Centrelink staff about the services and give out informational and promotional material.

The shopfront operated between 12.00-2.00 pm daily. Three separate displays of books and reports from the library collection on differing topics were displayed. Workflows were developed to enable requests generated from the shopfront to be completed as business as usual by the relevant library teams.

Library staff in Caroline Chisholm Centre until 23 January, 2009

We wanted to trial the provision of some services from within the Centrelink environment. It also allowed the Library staff to identify and seek resolution of technical issues that arose. The agencies run separate IT networks and FaHCSIA Library staff couldn't access the library services page on Centrelink's intranet CentreNet.

A report with recommendations was presented to FaHCSIA and Centrelink after the Quarterly Business Discussions in February 2009.

Library services we currently provide to Centrelink

- Collection – physical at TOP and virtual
- Archive of Centrelink and FaHCSIA publications
- Current awareness services including daily and weekly email alerts
- Sourcing of documents and delivery to you (electronically or paper)
- Reference service
- Research bibliographies
- Training on access to and use of our resources, including databases and electronic journals

These are fairly typical services, but just to give a feel for what we are currently providing to Centrelink.

FaHCSIA Library Services

A bright slide that comes out of one of our training sessions for Centrelink staff.

Findings and outcomes

Findings from the data confirmed current services were highly valued by the staff in Centrelink who did use the service. However, the project uncovered a large body of evidence that many staff were unaware of the full range of services available. Those who did know about the services, often expressed difficulties in accessing them

The findings of the project gave a comprehensive insight into the differences between the agencies (FaHCSIA and Centrelink) and confirmed the need to target information services to meet the unique needs of the Centrelink environment. Centrelink has different business outcomes to FaHCSIA, with overall operations conforming to a client based business model.

Information needs for National Support Office staff focus on requirements to deal with project management, leadership skills, personal development and acquisitions of new (IT) skills.

Psychologists and Social Workers are key users of Research and Alert Services and were able to give constructive feedback on services and resources. This client group had high expectations and high regard for the services already provided.

Customer and Call Centre staff had some awareness of the library, but could not identify how the services offered could be of assistance in their work. Some utilised Frontline Manager (articles provided by the Library) to access material for self improvement and leadership.

Staff around Australia saw lack of access to a physical library as a barrier and did not actively pursue the availability of online services, especially if they encountered difficulties.

Generally, the use of library services was impacted by time restraints and lack of knowledge of available services. Most of the recommendations focus on promotion, access issues and ease of product usage.

Where to from here

There are several big wins which I will highlight in a moment, but more general follow-up topics included:

A basic marketing plan has been prepared and will be activated to coincide with other changes, including the change to the Centrelink Alert and our system upgrade.

Training needs will be addressed in a comprehensive Training Plan, including regular scheduled sessions in Centrelink and possibly online training.

Centrelink requirements for the development of the collection (physical and electronic) are better understood. This includes the need for particular groups of IT materials, standards and material to support training in leadership, mentoring, coaching and supervision.

Processes are under discussion for ongoing consistent supply of Centrelink publications for incorporation into the collection. This will assist the service provision in a number of ways, as the collection is patchy at present. We are also negotiating for access to market research reports prepared for Centrelink.

Our presence and the survey have raised awareness of the Library services. This is something we hope to build on and develop.

Big Wins

Improved business relationship

Staff in our client area in Centrelink have engaged with and been supportive of our role. They value what we are doing, and it supports their training and development role.

Better product specifically in the Centrelink Alert

Several changes have been made to the Centrelink Alert. It is now weekly and loaded onto CentreNet rather than emailed to recipients. This also allows a small archive of the alerts to be maintained and accessible to users. Content has changed to reflect less daily news and more of the meaty 'value-add' material of potential interest.

Better access to and on CentreNet (Centrelink's intranet)

We can now see the Library pages on CentreNet. This is a great improvement when trying to assist Centrelink clients to navigate our material or resolve issues.

The library page on CentreNet has been completely re-vamped.

It is gone from **This** The original hastily constructed page which went down to a long list of databases without context to **This**. The changes are relatively simple but a major improvement.

Large network of users and key contacts within Centrelink

Again staff in Centrelink have been engaged with us and been supportive of our needs over a time of immense pressure for Centrelink.

Structure provided for the way forward

The report makes a series of recommendations that will give us a structure for the future, including ongoing client feedback and engagement mechanisms.

Finally we have evidence to support our 'gut feelings' about the services we provide to guide us into the future.