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Service excellence: a campaign to build capacity to match service demands in a large South African University Library

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Abstract
The context, programme and challenges of a Library "Service Excellence Campaign", are described and discussed. The campaign was initiated during 2004 at the University of the Witwatersrand, Johannesburg as part of a university-wide pilot programme. In the context of increasingly sophisticated library information services, systems and academic users, heavy demands are made on staff development in the workplace, and on managers and supervisors accountable for the quality of service delivery. The paper describes a workplace training programme developed on the basis of a customer service survey. One of the planned outcomes for the Library is a "Client Services Charter"; a senior staff workshop brainstormed core elements of this and several examples of Library Service Charters available on the Internet are given. These were selected for their references to staff performance and abilities, and the paper concludes by suggesting that incorporating these concepts into a service charter, as well as more arithmetic standards of service, should continually remind staff of their commitment to service excellence in the University Library.

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Introduction: in search of excellence

The University of the Witwatersrand, Johannesburg (Wits) has used the term "excellence" to express its mission, vision, goals and ideals for many years. Substantial references to "excellence" appear in many documents on the University website.[1] One of the most recent of these is the University's so-called "transformation document", *Into the future,*[2] prepared by a high level University "think tank" in 2004. This 33-page document embodies the University's current perceptions of how it should change and achieve "excellence". Improving service excellence is one of the explicit focus areas of transformation at the University; and *Into the future* incorporates sections headed "Transformation as excellence" and "Transformation as service excellence."[2] Nevertheless, the meaning of excellence in the context of "transformation" is never made explicit.

A 2004 two-day "Service Excellence" workshop offered at the University by the Centre for University Learning, Teaching and Development (CLTD), targets support and professional staff dealing with the University community; its objectives state that at the end of the workshop participants should be able to
- Identify clients of the University and understand service from their point of view.
- Recognise client needs and expectations
- Communicate effectively with clients
- Understand the impact of a positive mental attitude on service
- Recognise the positive effect of support systems within the work environment
- Demonstrate an effective telephone technique
- Deal with difficult clients
- Draw up a strategic client service plan for departments. [3]

A recent internally circulated report, on feedback from a series of University "Have your say" workshops held in mid 2004, acknowledges that "there seems to be no University-wide definition of what is meant by excellence", but reports opinions that delivering academic excellence is hampered by poor teaching conditions, which include "the poor state of Wits' library facilities."[4] The section on "Transformation and service excellence" in *Into the future* refers to the 2004 CLTD Service Excellence campaign "aimed at improving the service offered to internal and external clients of all the University's services. These clients include our own members of staff, using services offered by support departments …" [2]

The Library and service excellence

The current draft of the University "Operational Plan" links operational goals to the goals of the University's Strategic Plan. Goal 1 could be taken as an implicit definition of "excellence" at the University:
> "Teaching, learning and research practice to ensure that student success and adaptability in undergraduate and postgraduate education are of the highest quality, to grow the number of world-class research areas at Wits, to produce independent thinkers who will contribute, in a broad sense, to the intellectual status of the country, and to promote and defend the principles of academic freedom and tolerance."[5]

The evolving goals of the Library's Strategic Plan[6] express explicitly the core academic support role the Library perceives for itself in support of University teaching, learning and research practice. Goal 1.4 reads, "To provide high quality academic support services that are inclusive of all sections of the University community and responsive to the needs of the

individual." Goal 2, in step with University Goal 3, is "To recruit, develop, retain and reward high calibre and service oriented members of staff who are competent, individually and collectively, to achieve the Library's goals."[6] Participation in the University's Service Excellence campaign during 2004 has therefore been in complete alignment with these goals.

In the beginning: "Moments of truth"

In late 2003 the University commissioned a pilot programme to address service excellence in Support Services, using a consulting company, ServiceMix, whose chief consultant was also a part-time lecturer at the University's Business School. This was coordinated by the Director of the CLTD, and initially targeted three major University support services units, including the University Library.

The Client Services division of the University Library comprises the libraries serving all faculties and schools except the Health Sciences and Law libraries. There are over 80 members of staff in this division; approximately 65% hold posts at library assistant grades where formal professional qualifications are not required. Senior professional librarians carry first line managerial and staff development responsibility for branch librarians and staff in smaller branches, and larger service sections. These 7 librarians, including the Deputy Client Services Librarian, make up the Senior Librarians' Team (SLT) which was responsible for driving the first year of the Service Excellence programme.

The historical demographics of the staffing structure of the University, as a South African institution, are such that the substantial majority of library assistants use English as a second or third language. It is these staff who are at the front desk of most service points most of the time, and these staff who field the first line of inquiries and must choose how to respond and whether to refer users elsewhere. It is therefore these staff whose service delivery predominantly formed the basis of the perceptions described below as "moments of truth", on which the service excellence campaign has been predicated. These members of the Library staff confront major challenges every day, in the form of complex high-tech integrated library systems in a decentralized library, and the use of academic subject terminology in receiving and responding appropriately to requests and inquiries from a wide range of undergraduates, postgraduates and academic teaching and research staff.

Following initial discussions with members of Library Management in October 2003, the ServiceMix consultant appointed student assistants to conduct and analyse pilot interview surveys. These were carried out on samples of student and academic staff users of two specific Library units commonly perceived as delivering poor service to their University customer base. Four detailed reports on the surveys, two customer service index (CSI) reports[7-8] and two assessments of best practice[9-10], were rapidly processed and prepared for workshopping during November.

The "Moments of Truth" were verbatim comments in response to the "Moments of Truth" section of the Customer Questionnaire (reproduced in Appendix 10):

> A) Think of a time when you had a particularly **satisfying** or **dissatisfying interaction** with [a member of Library staff] and B) Are there any **recurring service issues** which you feel the [Library] ought to address to improve their service? C) Please add any other appropriate COMMENT on the way service from [the Library] is or should be delivered that can lead to improvements.[7-8]

These comments were recorded in full in an Appendix to each report and, together with the verbatim comments accompanying the structured general questions and so-called "recurring issues", would make uncomfortable reading for managers of any service environment. With reference to Library staff, these reports showed that staff attitudes, interactive skills and levels of competence, as perceived by users, urgently needed to be addressed. As the introduction to Section 1 of each report states,

> Moments of Truth represent a vivid and candid account of customers' actual positive or negative encounters with your service and your staff. They are your customers' perception of what they perceive is happening for them with your service right now. More often than not, they form the basis of a point of view which tends to become entrenched in your customers' minds and highly resistant to perceptual change …[7-8].

The two best practice assessments[9-10] analysed the "Top-10 issues" and identified "service culture" and "interaction skills" as the "relevant best practices" to address "negative staff attitude". Technical competence, "interaction skills" and "service culture" were the identified components of "relevant best practice" to address issues of Library staff competence[9-10]. These reports offered brief descriptions of "best service practices" and commented that "building internal capability" is less of a "best practice" in itself and more of a supporting activity to all other best practices. In this instance the supporting activities identified were service culture, a shared vision driving the service; technical and interactive competences; and team work.

Prior to the workshops, further discussions based on the reports took place with the consultant, the University Librarian, the Deputy University Librarian who is overall line manager for Client Services, and the Deputy Client Services Librarian (whose portfolio includes user surveys and Library suggestion boxes). It was agreed that

- the Library would participate in the Service Excellence workshops at CLTD;
- although users of only two service sections had been surveyed, these would not be the only sections involved: the "moments of truth" and other comments were likely to be relevant in all Client Services branches;
- the campaign would be driven by the Senior Librarians' Team (SLT), headed by the Deputy Client Services Librarian.

CLTD Workshops

In November 2003, the SLT (expanded to include two other senior members of staff), together with similar teams from other University units, participated in three CLTD workshops facilitated by the consultant.

- The "Top-10" customer service problems identified from the survey inputs were highlighted and strategies on how to address these problems were discussed. The "Top-3" problems that emerged were
    - negative staff attitude
    - hours of opening
    - staff competence

- The SLT group was helped to define and understand problems from a customer perspective, asking questions like

- - What happened that caused a library user to say a member of library staff was incompetent?
    - Why does the user see it as a problem?
    - How is it a problem to the Library ?

- A long list of "Drivers & Barriers" (that support or block good practice) was compiled and analysed in relation to the "Top-3" problems. Many of these were environmental or systemic; almost twice as many (71) barriers as drivers (39) were mentioned. Drivers that may be considered directly relevant to staff competence and interpersonal attitudes include:

Right people for the job	Continuous improvement of skills
Performance appraisals	More time to finish work
Training for computer literacy	Discipline
Department dedicated to competence	Teamwork
Training, skills development	Good communication improves
Interactive skills	performance
Understanding the Wits environment	Focused meetings
Knowledge of procedures	Feedback from meetings
Motivation & coaching	Compliments from customers

SLT brainstorm: February 2004

The challenge to the SLT, back in the Library, was to inculcate, enhance and reinforce a "culture of best practice" in all sections of Client Services. Many specific and practical recommendations had emerged from the workshops. These included Wednesday morning late opening for staff training sessions; establishing levels of staff competence; dealing with client problems by ensuring an adequate and appropriate staff presence at all times; induction programmes for all new Library staff; assessment of improvement by surveys, suggestion box comments, compliments and criticism received ("bouquets & brickbats") and a "Question of the Month" ongoing survey.

A full-day breakaway SLT "brainstorm" session addressed in particular:
- What attitudes and competencies should change?
- What could be addressed by a programme spread over 2-hour sessions on 8 Wednesdays?
- What kind of evaluation could be incorporated?
- What are the core elements for a "Client Services Charter"?

Their recommendations built the structure and contents of the 2004 training programme. To facilitate this, the Senate Library Committee approved, at its first meeting of 2004, the proposal that all sections of the Library should open at 10h30 instead of 08h00 on the first Wednesday of every month to accommodate programmes for staff training (except in exam months, June and November).

Training for competence; recognising and changing attitudes

Senior Librarians were briefed to plan and deliver in-library, interactive, staff-centred branch training programmes in 2-hour sessions intended to build competence, basic knowledge and application of information available on the Library's website. Case studies, video

programmes showing client and staff interaction in libraries, and discussion of in-house problems were incorporated in the programme.

The first, essential, step was to explain to all staff in all branches the origin and purpose of the Service Excellence campaign. This was met in some libraries with criticism and resistance. Next, Senior Librarians were asked to establish, informally and without actual testing, some idea of the ground levels of staff competence in a number of areas:

- circulation & desk routines (Wits Library uses Innopac Millennium and training is carried out in a separate program by the Library Systems Coordinator and colleagues);
- logging on and off specific programs;
- directional knowledge of the information contents of the extensive Library website;
- basic subject knowledge for information retrieval from e-resources (Wits Library subscribes to an extensive range of over 55 major electronic resources products which provide access through a subject portal to thousands of full text electronic journals);
- knowledge of own branch subject coverage and other libraries (working from the courses and programmes outlined in the Faculty Handbooks of the University Prospectus);
- how to deal with "customers" (using videos and locally developed case studies).

Issues of "dealing with customers" included:
- sufficient staff at service points during lunch and tea breaks;
- rotation of staff to acquire a range of skills and thus substitute competently if other members of staff were ill or away (Library staff have been accustomed to being appointed to one post with one specifically defined job description listing the specific tasks to be undertaken; moving outside this presents a challenge and can result in resistance);
- selection of appropriate staff for positions/grades (this also includes an understanding of preparation for a career path within the library and the controversial issue of "succession planning");
- staff recognition/reward system (a controversial issue);
- involving the Library Education & Training section in service delivery & motivational sessions;
- feedback to staff on outcomes of service excellence surveys.

The need for a Library-specific induction programme for all new Library staff was also identified.

Contents of training sessions

Senior Librarians were given freedom to plan the monthly Wednesday morning programmes as they wished, provided they covered the core elements of
- increasing knowledge of the contents of the Library's website (a "walk through the website");
- basic knowledge of the existence of, and first line access to, Library electronic resources;
- basic knowledge of the fields of teaching and research carried out in the faculty and schools served by each.

It was emphasised that basic directional knowledge about the contents of the website and electronic resources could not be a substitute for referring subject information inquiries to the professional Library staff in each branch.

Suggestions were made as to how these sessions might be carried out; these were not prescriptive. Periodic reports were required. Methods chosen for exploring databases and the Library webpage in the first 3 months of 2004 included

- holding sessions on accessing and using databases, either in branch libraries or in the Library Electronic Classroom facility; reporting back and sharing what had been learnt on training sessions attended by individual members of staff;
- staff taking turns to show one another aspects of a resource or section of the website, or working with one another on problems; this led also to a greater sense of teamwork and reliance on each other for assistance in approaching user inquiries;
- visits by groups of staff to different sections or branches, to expand awareness of the system as a whole and improve response to users' directional or information inquiries; these were very popular.

Many user perceptions and comments related to Library attitudes. The training sessions in the second half of 2004 required staff to focus on this more personal and therefore potentially sensitive issue. The point was made repeatedly by Library staff that the attitude of users, both academic staff and students, was part of the problem (and that the "moments of truth" referred to above were therefore in many cases only part of the truth).

In August a video viewing session for all client services staff was prepared and presented by the author as division manager. Several Library customer services teaching videos from both the UK and the USA were used, interspersed with active discussion relating what had been portrayed on the screen to personal frontline experiences. It was evident that these videos brought an added dimension to recognising and understanding attitude problems and exploring ways of managing difficult situations and interactions with clients. The issues addressed covered many familiar front desk scenarios, ranging from academic staff anger at being fined for late returns, to receiving time-consuming inquiries or dealing with long lines at the moment a member of staff was due to go on a break, to incomprehensible accents of non-English speaking users (it was significant that language problems at the desk were revealed to be not at all uniquely South African).

Follow-up training sessions featured more videos selected by senior librarians, discussions of actual problem situations experienced, and informal role-plays within libraries to act out solutions. A set of short scenarios for handling information inquiries was developed by the Library's Education & Training section and a set of short role-plays on attitudes was prepared by the acting Senior Arts Librarian.

Assessment and feedback

The SLT workshop had agreed that assessment of the extent of improvement in perceptions might be evident from
- surveys (a repeat of the CSI customer surveys is planned for late 2005);
- suggestion box comments, compliments and criticism (already well established);
- a new in-library and web-based "Question of the Month" (QotM) self-administered survey, starting in August 2004. Each QotM will be self-administered twice, in the second half of 2004 and again during 2005. The first QotM asked " *Do you find the*

Library staff helpful and responsive to your needs?", echoing Question 9 of the survey conducted by ServiceMix students. The simple, non-scientific analysis of the 720 responses to the first QotM showed 85%-100% positive responses, in all but one library. The analysis by branch was made available as positive feedback.

During 2004 CLTD established an email "Service Excellence Hotline" to facilitate feedback on a full range of University Service divisions, including the Library. Possibly because branches of the Library have well established suggestion boxes and online communication links from the Library web page, very few comments (all positive) were forwarded by CLTD to the Library. No negative comments were forwarded.

Two review meetings were held with Library staff: with SLT in November 2004 and with all Client Services staff in early December. Senior Librarians commented that their branch staff

- seemed to have more overall knowledge of the Library and its systems;
- seemed to have more awareness of themselves in a service context;
- smiled more;
- worked with greater confidence on what they did and did not know, and could refer more easily;
- worked more as a team.

The review meeting with all staff in December 2004 reinforced many of these comments. Suggestion box comments had decreased since the introduction of the focused QotM collected through the same process. The second QotM, in September-October, which at the time of writing is still to be analysed, asked if clients had found what they needed in the Library; the third, running on until the end of January 2005, asked whether the Library had met clients' research needs.

The challenge in 2005, the second and final year of the campaign, will be to maintain and reinforce a "culture of self development" in tandem with sustained and increasing levels of service delivery. Key focus areas will be

- **transferring skills** from training sessions to the service desk
- **subject knowledge and terminology:** what faculties teach and what research they do; what terms they use;
- **information services and keeping up to date** with Library resources and services
- **discussion sessions** to share problems experienced with challenging clients
- developing content and wording for a **Client Services Charter**

Staff development and user expectations: a Client Services Charter

At the February 2004 workshop, Senior Librarians were asked to brainstorm a list of core elements for a future Library Client Services Charter, a tangible product of the Service Excellence campaign. (The author was personally pleased to learn, in a personal email communication in September 2004 with Ian Smith of La Trobe University, Australia, that this process had been successfully completed over a two year process by the La Trobe Library).

The SLT identified the following core staff and service elements for inclusion in a charter (in addition to the provision of appropriate resources and study environment):

- access to staff competence: staff who know how to use the Library's resources;
- access to training for staff and users for the efficient/effective use of resources;
- a service ethic culture among library staff, which included a culture of referral (i.e. "humility");
- commitment to speedy, pleasant service;
- facilitating the user's quest for knowledge;
- continual improvement of service.

A Google search of the synonymous terms "client service charter/customer service charter/service charter/user charter" retrieved several hundred results from the websites of universities across Australia, New Zealand, the United Kingdom and the United States. A selection of approximately 30 examples revealed widely differing references to staff competence: in some charters, staff seem to be mentioned only nominally, as part of the overall environment. In the brief extracts from 17 charters quoted below,[11-27] however, the references to staff performance clearly would lead clients to expect continual professional and workplace staff development in the library as part of the overall quality of service delivery, and should serve as an imperative for sustained monitoring and planning. The charters described this core element in the following words:

"…professional qualified staff; professional accurate information services" [11]

"To develop and maintain well-trained and qualified staff that is dedicated to service excellence, to provide the best most responsive service…, to be the information hub of the University …" [12]

"leadership and expertise in navigating an increasingly complex and diverse scholarly information environment…" [13]

"Our staff are well trained and committed to maintaining the highest standards in serving you. They will… respond to your queries promptly or refer you to another librarian…An external review of the Library recommended four key services: … Experienced staff to assist with your information needs… Support in assisting you to become an independent learner through expert assistance at our service desks…" [14]

"The Library staff aim to: Provide useful and knowledgeable advice about the library environment and services; Deal with your requests in a timely and efficient manner; Assist you in finding information;" [15]

"The Library is a vital partner in the teaching, learning, research and community service activities of Murdoch University... Our objective is to provide the best possible library service and to be responsive, innovative and professional in everything we do." [16]

"We will create a service responsive to our users' needs; … We provide customer care training for library staff; We train our staff to provide a quality service. "[17]

"…Its educational and resourcing activities are supported by the broad knowledge and skills of its staff teams. The Library uses the Balanced Scorecard as its quality management framework. This integrates the performance management program and other quality initiatives into a comprehensive planning tool. Annual initiatives and key performance indicators focus on – client perspectives; internal processes perspectives; learning and growth

perspectives; financial perspectives. Library staff are committed to giving you high-quality service. Their knowledge and expertise is continually enhanced through the Library's staff training and development program… Liaison Librarians continually strive to be aware of the requirements of faculties and disciplines and to help you with your detailed information needs… Our aim is for continuous improvement in the quality of our service." [18]

" We train our staff to provide a high-quality user-focused service and to help you make the most of your time at …" [19]

"To be an innovative university library service which is integral to the institution's achievement of quality in learning, teaching and research. To achieve this the Library will Provide comprehensive and high quality services within the resources available… Library staff will be appropriately trained and provide courteous and helpful service to users" [20]

"We aim to provide quality service… through… skilled assistance in locating information resources; an efficient, responsive and flexible organisational structure" [21]

"The staff of the … Library are committed to providing excellent service. Success in providing excellent service is a partnership between library staff and library patrons. The Service Charter describes: our overall commitments to excellent service; the levels of service that we to achieve within the limits of available resources; Service commitments: Library staff are committed to providing the best possible customer service within the limits of available resources." [22]

"The Charter Mark is an award for excellent public services… we had to show that: We set tough performance standards and tell you whether we are achieving them; we are courteous and helpful, and responsive to your needs and wishes" [23]

"Library staff will be helpful and courteous in their dealings with users"[24]

"We strive to understand and meet the information needs of our clients and will offer a professional and courteous service to all library users" [25]

"The University … Library is a dynamic partner in the teaching, learning and research activities of the University. The Library provides high quality information services and resources to support students and staff… Through it services, staff expertise and programs the Library assists clients to develop skills for lifelong learning… Library staff work collaboratively …to develop library resources and services to support the diverse learning and teaching programs of the University" [26].

"High quality services are provided by well-trained staff who are responsive to user demands and proactive in the development of services and in the use of new technology" [27].

Statements of commitment to excellence are a matter of words; measuring up to the words and monitoring this continually remains the challenge of all staff development programmes. For the future Client Services Charter of the University of the Witwatersrand Library, detailed statements of commitment to performance as well as service excellence, such as those quoted here, particularly from the charters of Murdoch University[16], Queens University of Technology[18], University College Worcester[20] and the University of Sydney[26], are models that express much of what the Service Excellence campaign hopes to achieve.

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