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## People Profile: Michael Wright

Editor

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Lean is a process improvement tool pioneered by **Toyota** that seeks to eliminate steps which fail to add value to a process, promote those which do, and note necessary steps which are neutral. A typical Lean event involves an intense multi-day event, known as a Kaizen Blitz, where participants go through a set of exercises designed to eliminate waste (processes or steps which don't add value to the end product), improve quality, and reduce costs and process time. Numerous variations on the technique exist, but for the process to be effective it is best that commitment and ideas flow from line staff upward. A Lean event typically begins with an agreed-upon "case for change" — reasons why the effort is seen as necessary. Changes might be structural or workflow oriented. Once established, goals and desired outcomes are formulated, as are specific metrics designed to gauge the success of the Lean event. The technique is built on the understanding that few workers strive to be inefficient and that most have ideas for improvement. Unlike a more traditional Lean process, the one established for ARC was spread over nearly two months, as opposed to the very intense three-day long "blitz" approach. For ARC staff, this worked well, and allowed tensions to evaporate between meetings.

CTS used a variant of Lean developed by OE for an academic environment. The OE model recognizes the importance of the social side of an organization and that change is often difficult for those involved. The local program also places heavy emphasis on gap analysis. The review group takes a structured approach to analyzing the 'current state', developing a future or 'ideal state' and determining a realistic alternative. An analysis of the differences, or gap, between the states is made and methods for bridging the gap (action items) are formulated. OE facilitators work to create a social environment conducive to the free flow of ideas while guiding the group through a series of exercises that provide focus to the activity. Although the review group is ultimately responsible to see that actions items are accomplished and that ongoing process review becomes part of the workplace culture, OE staff monitors progress via a series pacing reviews.

ARC operations include acquisitions, receiving, rapid (copy) cataloging, and electronic resources management. It has a staff of 26 FTE with two professionals, six paraprofessional managers and 18 paraprofessionals. CCU consists of 19.6 FTE staff, eight professionals and 11.6 paraprofessionals, and is responsible for monographic and continuing resource cataloging and catalog maintenance. Although each unit has distinct functions, there are overlapping responsibilities that must be closely coordinated to maintain consistency and efficiency. A CTS supervisors group has been formed to identify areas of mutual interest and to improve communication and collaboration between the two units. This group will play a key role as we move forward in implementing the plans we have developed.

## against the grain people profile

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### Michael Wright

**BORN & LIVED:** Michigan, Minnesota, Pennsylvania, Colorado (briefly) and Iowa.

**FAMILY:** Partner, **Michael Knock**; son, **Chris**; dogs Tank and Molly.

**EDUCATION:** BA, **Central Michigan University**, MA, **University of Minnesota**.

**GOAL I HOPE TO ACHIEVE FIVE YEARS FROM NOW:** To have finished painting the house.

**HOW/WHERE DO I SEE THE INDUSTRY IN FIVE YEARS:** E-serials will almost have completely wiped out print serials (thus no more receiving backlogs and binding headaches); eBooks will remain a niche item, but filling a larger niche. E-resource management & licensing will start being standardized. Most libraries will be letting vendors take care of many (perhaps most) technical services needs, while library technical services staff concentrate on providing/enhancing access to collections of local significance. 🐾



Given that ARC was a newly formed unit, it was the first to proceed with its Lean planning process. While the workflows of the unit fell very logically into the Lean concept, staff schedules and the nature of the functions performed by the staff participating in the process did not allow for the typical blitz format to be used. Instead, the twenty-four hours of Lean exercises were conducted in two to four hour sessions over a period of six weeks. On the other hand, the objectives of the CCU Lean review were not as workflow oriented as most Lean processes, but the activity was conducted in the standard blitz mode. Given differences in the nature of the work of the two units, the action items resulting from each review were quite different.

#### ARC Planning

On May 1, 2006, the new Acquisitions and Rapid Cataloging (ARC) Unit was formed. An amalgamation of the former Acquisitions, Rapid Access, and Electronic Resource Management Units, it was clear from the beginning that there were overlaps of work, and repetitious, redundant and likely unnecessary tasks being done in each area. The merger of the three units allowed an examination of the efficiency and effectiveness of total processes, not just individual elements. This was important: only a careful analysis and overhaul of workflows and procedures would truly make one functioning unit from three.

We needed and formed an action plan. As soon as the merger of the three units had been approved administratively, but before staff was informed, the director for Central Technical Services, acting Acquisitions Unit head, and the soon-to-be head of the new ARC unit began

meeting together and with staff from the University's Office of Organizational Effectiveness (OE) to plan what slowly morphed into a Lean process. Participants included the unit head and seven paraprofessional managers.

The ARC process started with a case for change — why we felt we needed to undertake a top to bottom review of our work. Among the reasons cited:

- Merger of three units allowed for an opportunity to examine efficiency and effectiveness of the total process, not just individual elements
- Changing customer expectations and some customer complaints related to processing times
- The existing process had potential to backlog materials processing (as often happened)
- Benchmarking with selected peer libraries indicated that Iowa was behind in utilizing technology and vendor services

There was, additionally, agreement to view processes through the eyes of a customer, not those of a staff member, as well as a willingness to create an adaptable environment in which the speed of acquisitions and processing would be increased by at least 25%, as measured by specific metrics.

Realizing certain constraints (limitations of our ILS, laws governing business processes, etc.) efficiency evaluation began with the serials ordering process, the then-current state. When parsed out on paper this took a whopping twenty five steps depending on the type of material (print or electronic) being ordered. Participants analyzed the steps in terms of

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