

## Introducing Customer Driven Revenue Generating Practices

### Using Existing Resources

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BioMedical Information Services, Gibson Lewis Library

#### A. Department Profile:

BioMedical Information Services (BiS) is a discreet unit within the Gibson Lewis Library. (\*See attached PDF, “OrgChartFinal.”) BiS was created to improve the quality of service to for-profit clients and to raise revenue streams that accurately reflect a true cost recovery model for the Library. BiS works directly with all departments within the library and the ITS department. The services and products that BiS delivers to its client base are:

- 1. *Research Services on Medical Topics-*** *Online database searches performed by professional medical librarians, producing a bibliography and/or abstracts on the requested subject.*
- 2. *Retrieval and reproduction of documents requested by clients-*** *A document retrieval specialist pulls and scans or copies articles and pages from journals and books in the Gibson Lewis Library collection. Items not held by our library are referred to interlibrary loan for fulfillment.*
- 3. *Consultation services-****BiS offers Law Firms, Commercial Laboratories, and physicians unaffiliated with the university or TOMA, the advice of professional medical librarians to help the clients create small medical libraries in their own firms and offices.*

BiS is organized on a start-up business model and reports to the Associate Vice President Information Resources, Executive Director, Gibson D. Lewis Library, Bobby Carter. Creating a separate start-up “business” unit allows decisions to be made quickly to meet the needs of our target clients. (\*See document-“BiS\_Lib\_Institution\_Relations” Our clients move at the speed of business, expecting fast service and accurate results. The previous model for meeting the needs of this client base did not always succeed because of a

lack of consistency in customer service. (\*see the attached organizational chart titled “OrgChartFinal”)

BiS is a very small department within the larger Library System. One (1) Document Delivery Specialist, Michael Pemberton, handles client requests between 9 am and 6 pm. The other member of the team is the Marketing/Business Development Director, Martha Whitehouse who handles marketing, sales, client relationships, growing new markets for BiS services and covering after hours questions and requests.

The majority of the revenue-generating clients of the library are law firms and commercial laboratories. Many factors can affect these businesses’ ability to perform their jobs and BiS must respond appropriately to their needs. This response could only be fast enough if BiS was structured as a separate entity, accountable to its clients and the budgets, missions, and goals of the library as defined by senior Library administration.

The major stakeholders in our project are our commercial clients, the professional and paraprofessional employees of the Library and its Administration, and departments within the UNT Health Science Center, specifically Information Technology Services, Legal Affairs, Accounting and Facilities Management.

All of the work done by library staff in every department plays an important role in supporting the operations of BiS. Examples include: Librarians performing research and consultation, Circulation staff handling book and journal management and first line client contact and Administration for setting budgetary goals and direction for BiS and for mediating the relationships between BiS and the other departments within the library. The administration of the University has helped this project by encouraging a spirit of innovation and flexibility, allowing our department to pursue a revenue building venture.

Further, departments within the library have a stake in the success of BioMedical Information Services because generated revenue is used for salaries, travel budget, acquisitions and more.

Departments outside of the library played and continue to play important roles in our project. *Information Technology Services*, acting on an initial plan drawn up by BiS, built and continues to expand a client and patron database for processing information and research requests. The tools and databases ITS is creating for BIS are eliminating redundant and outdated software systems and the completed database will be able to provide information and support that were previously available only through a motley assortment of ill-maintained databases and manual paper-based procedures. Examples: Two separate statistics gathering procedures, one manual and the other residing on a single computer behind the main circulation desk are being replaced by the enhanced system.

*Legal Affairs* provided BiS with invaluable information on the legal market, giving us insight into the needs of our clients and ways to grow the number and variety of clients BiS serves.

*Accounting* aided our endeavor by providing information and assistance in setting up a credit card collection system so that we can consistently collect fees from overseas clients, a task that had proven especially difficult in the past.

*Facilities Management* provided construction services on the BiS offices that allowed us to move the operation from the high traffic area of Circulation to the third floor of the library, where we have a quieter environment and better access to the Journals and other

materials we use to fill client orders.

## **B. Leadership**

In the summer of 2003, the Associate Vice President Information Resources and Executive Director Gibson D. Lewis Library , Bobby Carter, was charged by the Senior Vice President for Academic Affairs with organizing a task force to develop plans for the “Next Generation Lewis Library.” The Final Report of the Library Task Force identified several goals including the development of a new “Statement of Strategic Focus,” in the form of a new mission statement for the Library. The basis of our project and initial leadership for the BiS project is built upon the work of the Library Task Force.

Martha Whitehouse, Director of Market Development for Professional and Continuing Education (PACE) was asked to develop a comprehensive plan to raise revenue to support the needs outlined in this report which identified seven areas that require additional revenue or technology improvement. Namely:

- 1. Renovating the Library technology platform for the next decade.*
- 2. Strengthening and realigning the library collections to integrate the emerging stream of biosciences scholarly and curricular information with emphasis on new electronic formats while recognizing that print materials continue to play an important role for many health stakeholders.*
- 3. Addressing Service Trends- Library users are increasingly located at sites remote from the library and they expect the same level of services and resource access as on-campus users. Library staff will respond to this transformation by adopting a mobile work style, possibly including distributed workspaces.*
- 4. Support the fact that: Health Science Libraries are facilitating consumer (layperson) access to health information by collaborating with public librarians, educators, and community organizations to increase access to this information.*

5. Support *the service commitment of the Lewis Library (which) will be based upon: A shift toward outsourcing any service components that are not core library services and that can free staff for work on direct customer related outputs.*
6. *Recognizing the role of the library in identifying and acquiring part of the financial resources necessary to the ongoing health of the library plus the willingness to develop a library income stream to help meet university needs for up-to-date scientific information resources, whether from grants, fee-based services, or other sources.*
7. *Supporting the First Priority: Strengthen and under gird funding for long term development of appropriate Scholarly research resources in biomedicine. Other endeavors are subordinate to stabilizing this aspect of the basic library service. The good will and support of the campus community is dependent in large measure on more robust library advocacy for supporting the research collections, especially in terms of acquiring needed electronic journals.*

*From: A Stable and Sustainable Next  
Generation Health Science Library Service  
Model. Prepared for the Gibson D Lewis  
Library by Lou Wetherbee and Associates, LLC*

8- Additionally a shortfall in the library's fiscal system was identified in the *Division of Information Resources Annual Report for Fiscal Year 2004*, namely that "the library remains very dependent upon its generated revenue, which continues to fund Library operations for up to nine months of the fiscal year."

The leadership of the library communicated their expectations to faculty and staff regarding their roles in this project via an initial staff meeting outlining the report prepared by the Task Force. For the BiS project, general plans for the implementation of the program were presented in a staff meeting format. As the plan proceeded, Section heads for Reference and Circulation were kept up to date by the Senior Director Public Services, Dan Burgard. Additionally, because there were and are a great number of small changes implemented by the program, the project director, Martha Whitehouse, worked one on one

with library staff members who would be affected by changing procedures. Individual staff members were/are given drafts of all forms, letters, & documents, and their feedback is discussed and staff recommendations are integrated into the project as appropriate.

From that report we prepared a comprehensive revenue generation plan that became the roadmap for moving the document delivery services to a professional, consistent provider of services to commercial clients. (\* See attached document “BiS\_Proposal”)

In March of this year (2005) Bobby Carter and Martha Whitehouse introduced a plan to separate and expand the existing document delivery service to senior library administration, Dan Burgard, Senior Director Public Services and Craig Elam, Senior Director Technical Services. These two positions directly supervise the majority of library staff members.

### **C. Planning:**

The problem, namely sustaining and growing an independent revenue stream for the library, was identified in the *Division of Information Resources Annual Report for Fiscal Year 2004* and reinforced by the Library Task Force Recommendations. Additionally, Martha Whitehouse, created a presentation that identified the shortcomings of the existing service system for commercial clients and recommendations on how to build this service on a business model that would still serve the core mission of the Library and the Institution. A proposal was created to further expand upon the plan. (\*See attached documents “BiS Dev\_Plan” and “BiS\_Proposal”) A number of changes had to occur in the reporting structure and the physical framework of the existing document delivery function. (\* See attached document “BiS Development)

We judged the changes to be successful by the following parameters:

-The changes provided quality control and consistency for the services BiS delivers to its clients.

-The reporting structure change allowed decisions to be made more quickly so that BiS could keep up with the needs of its clients and generate invoicing totals quickly so that we could adjust our marketing plan.

The changes BiS development introduced into the library's regular structure were dramatic, as many of the existing procedures had been in place for many years (15+). Several staff members had to cooperate with BiS and adapt to the changes. Among the most affected were the Library's Accounts Receivable Manager, Shirley Green. She had to adapt to a time-billing system from a flat rate fee system for BiS commercial clients. Accounting and Interlibrary Loan had to adapt to the new computer-based ordering system. The cooperation of ITS was necessary in our efforts to build the software infrastructure BiS needed to handle an increase in business. An increased number of sales could not be driven through the existing model. ITS has been very responsive in their timely response to BiS requests.

The BiS project supports the university's mission of "dedication to excellence in service" and "meeting the needs of the People of Texas," by creating excellent service for clients and increasing independent revenue.

#### **D. Stakeholders**

The process used to identify the stakeholders for our project was fairly simple. The working relationships established between the library and its on and off campus partners have been well established for over twenty years. The traditional services offered by academic libraries to their faculty and students had to remain unaffected by the operations of BiS. One of the ground rules for the project was that the library's core mission would remain uncompromised even as we made the transition to actively soliciting more commercial business. The challenge

was convincing those partners and current library employees to interact with a subset of the Library (BiS) in a new way. *In other words to move to a model of consumer and service provider, where the library would be both customer and merchant for BiS.*

The library conducts business with most, if not all, of the departments on campus. Most interactions that are not related to ITS projects or Faculty and Student needs are handled by library administration and staff. In implementing the BiS business model we had to connect directly with departments such as Accounting, Marketing & Public Relations, Legal Affairs, Mail Services, PACE (Professional and Continuing Education) and Human Resources. Again, BiS followed a standard start-up business model and identified the products and services the business would need to operate, identifying vendors who could provide the service, (most often on-campus departments) and forming relationships with the individual departments that act as BiS vendors.

#### **E. Measures and Indicators**

The chief indicator of success for the BiS plan are invoicing numbers by month and ultimately by generated revenue. Our commercial clients receive invoices on a monthly and bi-monthly basis. Reports are compiled by the library's Accounts Payable and Receivable manager, Shirley Green. Year over Year figures are our benchmark. A spreadsheet is updated each month and presented to the director of the library and all appropriate staff. Our other, and most important indicator is the satisfaction of our internal patrons.

#### **F. Faculty and/or Staff Involvement:**

The original proposal for building BiS, included provisions to use on-site personnel to perform paid tasks to support BiS operations; activities such as database entry and helping with mass mailings . More importantly when we announced the program during an all staff meeting,



one of the stated goals of raising the revenue stream was to dedicate a percentage of increased revenue to achieve staff priorities once BiS had covered its start-up costs. (\$27,612)

Elements of the Database development project are also beneficial for librarians who have to keep detailed records of the numbers of searches they perform and which databases were used. The new system will soon automate a process that had heretofore been done by hand.

### **G. Process Management:**

Processes that were changed and/or incorporated into BiS operations were:

#### *Commercial Client Order Taking and Processing*

We moved from paper-based to an online system. We are readying an online order system for commercial clients. This process also involved creating a single point of contact for commercial clients off BiS. Prior to this change clients had no consistent service point, hampering our ability to offer superior service. The new system insures that a client will always reach a live person.

#### **Reporting Structure**

We made changes to the library reporting structure, moving document delivery from its position as part of Circulation and used it as the basis for creating BiS. BiS is positioned to report directly to library administration to enhance communication among all departments with finance authority.

#### **Pricing Structure**

We redesigned the pricing structure for service to commercial clients to be consistent with their own pricing structure. For example: We changed the pricing for librarian services to an hourly billing format (\$125.00 per hour). Hourly billing is very familiar to our largest client base; businesses specializing in legal work. This price for the services of professional librarians also

represents a more realistic cost-recovery model for the library, taking into account librarian salaries, benefits, and time allocated to outside patron services.

### **Pricing Decisions:**

We centralized pricing decision making to eliminate discrepancies and build an understandable pricing model

### **H. Performance Results**

a. Customer satisfaction has been excellent. We receive consistently positive feedback.

Below are some comments from our commercial clients. Further we have had few complaints in raising our fees for service.

*“You are a lifesaver. Thanks again for all your work. It is really appreciated!”*

Strasburger & Price Law Firm

*“In the newsletter, I will write up how great you guys are. Michael Pemberton, in particular saved the day many times.”*

*“You guys do a wonderful job! We really appreciate you.”*

Kevin Miles- Fullbright & Jaworski Law Firm

*“Thanks so much-This turn around was great. I appreciate your help!”*

Kathleen A. Zadel, RN, BSN- Gabbert & Associates Legal Nurse Consultants

*“Thanks Michael-we really appreciate your great service.”*

Thomas Dollar- Advocare

b. See attached spreadsheet “BiS Invoicing”

c. All members of the library team have performed their jobs and handled the tasks set for them to support BiS very professionally.