Duplication Roadmap

Process overview

This questionnaire is intended to help guide you through planning your implementation of a Duplication service model using Scribe or Gutenberg, including generating estimates of supplies needed for the initial stages, specific goals, and action items.

If you would like to read about North Carolina's journey through these stages, Craig wrote about their Scribe implementation in the Notes From the Scribe series.

Prerequisites

You must be using KLAS Version 7.7 before you can move forward with Duplication. The testing phase of implementing v7.7 also gives your KLAS Administrators and Reader Advisors a chance to start getting familiar with the Service Queue and Duplication Orders tabs, which are integral to Duplication Service.

Phase 0 – Staff Pilot

This phase is not required, but is recommended. Taking the time to start with a "Staff Pilot," in which you circulate the cartridges internally among staff and volunteers, allows you to more thoroughly test set-up before anything goes out to patrons.

Review these potential goals for a Staff Pilot and rank them by how important they are for your implementation process.

- ___ Build staff buy-in by letting them experience the process and get used to new terminology

- ___ Have RAs practice set-up procedure and build familiarity with new screens and processes

- ___ Fully test automatic selection criteria, building RA understanding and allowing admins to tweak settings to better fit your library

- ___ Have circulation staff practice duplication processes, get familiar with new equipment, & address any process errors before cartridges start going to patrons

- ___ Other:_____

Q. 0-1 Do you think a Staff Pilot would be helpful for you? If so, would you prefer to use the Preview database (so that you can freely experiment with settings and your statistics are unaffected) or Live (so you are sure that you are testing the "real" set-up)?

Q. 0-2 How many staff members and library volunteers could participate in a staff pilot?

Because cartridges used in the Staff Pilot are only circulated internally, it can be completed with minimal supplies. If no or few labels are available, you can use Dymo labels or similar, or even skip labeling at this stage.

Q. 0-3 How many supplies do you have on hand? What type of labeling will you use?

A lot of things are influenced by the number of titles included on each cartridge, including the default Service Queue size and how long it takes for cartridges to be read and returned.

Q. 0-4 What will be your "starting point" for titles per cartridge? How many cartridges would you like each participant to be able to have out at once?

Q. 0-5 Given that, how long do you expect it will take for most staff members to sample a few cartridges? Choose a desired start date and estimate a time frame for your Pilot.

Staff Pilot

Q. 0-1 Database _____

Q. 0-2 # Participants _____

Q. 0-3 Avl Cartridges _____

Label Type _____

Avl Labels_____

Q. 0-4 Titles per Cart _____

NS Cutoff _____

Q. 0-5 Target Dates

_____ to _____

Notes:

Phase 1 – Pilot

Introducing the new service to a small, hand-picked set of patrons allows you to work out the kinks, field test defaults and policies, and build staff experience with the new service model before offering it more widely. You could start small with 5-10 patrons (especially if you choose not to do a Staff Pilot, or only do a very brief one), or dive in with up to 50 patrons to really get a feel for things.

Depending on what supplies you have on hand, you may be able to proceed *before* getting additional supplies from NLS, or you may need to put in your order sooner. To determine how many supplies you are allotted, NLS will need to know:

Q. 1-1 How many Active Patrons do you have and what is your current annual circulation count?

To select your Pilot patrons, you might want to consider patrons that have a higher tolerance for change and who will be patient if something goes wrong, but who you know will offer honest feedback and keep in touch with you about how things are going.

Q. 1-2 How many Pilot patrons do you want to invite to start with?

What are your priorities for Pilot patrons? Rank the selection criteria for your library.

_ Change tolerance / Easy to work with

_ Active communicator

_ Known to RAs

_ Other: _____

Q. 1-3 What will be your "starting point" for titles per cartridge? How many cartridges would you like each participant to be able to have out at once? _____

Q. 1-4 Given the above, how many cartridges, mailing containers, and labels might you need for the Pilot? If you need more supplies, can you make up the difference from another source? If you do not have enough cartridge labels on hand, would you be comfortable using Dymo labels or another stop-gap with your Pilot patrons?

Q. 1-5 How long do you expect it will take for most of the Pilot patrons to return a few cartridges? Choose a desired start date and estimate a time frame for your Pilot.

Patron Pilot

Q. 1-1 Active Patrons _____

Annual Circulation _____

Q. 1-2 # Pilot Patrons_____

Q. 1-3 Titles per Cart _____

NS Cutoff _____

Q. 1-4 Supplies needed:

Est. Cartridges _____

Label Type _____

Est. Labels _____

Q. 1-5 Target Dates

_____ to _____

Notes:

Phase 2 – Expansion

Once your Pilot is running smoothly and you've heard back from the Pilot patrons about their experience getting a few duplication cartridges, it will be time to start expanding the list of duplication patrons.

What are your priorities for patrons to switch to duplication service?

- New patrons (so they won't know any different / experience any big changes)
- Patrons with a high number of requests
- Patrons with a preference for older titles / authors
- Patrons not using BARD
- Patrons with a high NSCutoff
- Frequent callers
- Other

Q. 2-1 What is your timeline for reaching all (or vast majority) patrons using duplication? If you switched or added the same number of patrons every month, how many would that be?

Q. 2-2 Do you want to expand the number of duplication patrons more gradually and ramp up later, or aim for your target monthly average right away?

Q. 2-3 How many new patrons do you add to KLAS each month?

Q. 2-4 Including the Pilot patrons, how many patrons total do you expect will be using Duplication 2-3 months into implementation?

You may decide to change how many cartridges each patron is allowed based on your Pilot results, but for estimate purposes, assume that you keep the same NS Cutoff and titles per cartridge.

Q. 2-5 Do you have enough supplies for your first few months of Duplication Service? How much leeway or shortfall do you expect?

Expansion

Q. 2-1 Target Date _____

Ave. per month _____

Q. 2-2 First mo. target _____

Q. 2-3 New pat /mo. _____

Q. 2-4 Total early patrons _____

Q. 1-4 Supplies needed:

Est. Cartridges _____

Est. Labels _____

Supplies on hand (after Pilot):

Avl Cartridges _____

Avl Mail Cases _____

Avl Labels_____

Notes:

Next Steps

Hopefully, your Pilot and initial expansion will go well. At that time, you should be equipped to decide whether to ramp up and push Duplication Service out to a certain percent of your patron base each month, or to stay gradual and allow existing patrons to "opt-in" for a while longer.

However, accepting a Gutenberg or supplies from NLS does obligate you to make progress towards 0 copy allotment and serving the vast majority of your patrons through Duplication.

We hope that your road to a Duplication service model is a smooth one! But if it isn't, remember that we're here to help.