

SWAN Clarity Task Force

Notes

Thursday, May 2, 2019, 10:00 a.m. – Noon

Introductions

Task Force Membership:

1. Kerry Halter, Technical Services Manager, Batavia Public Library District, khalter@batvaiapubliclibrary.org
2. Kristina Howard, Adult Reference Manager, Tinley Park Public Library, khoward@tplibrary.org
3. Michelle Kurczak, Head of Youth and Young Adult Services, Messenger Public Library of North Aurora, MKurczak@messengerpl.org
4. Cindy Maiello Gluecklich, Director, Melrose Park Public Library, maielloc@mpplibrary.org
5. Amy Prechel, Head of Access Services, Downers Grove Public Library, aprechel@dglibrary.org
6. Angela Romano, Fiction and Reference Librarian, Oak Lawn Public Library, aromano@olpl.org
7. Ahren Sievers, Reference Technology Librarian, Elmwood Park Public Library, asievers@elmwoodparklibrary.org
8. Colleen White, Cataloging Librarian, Oak Park Public Library, cwhite@oppl.org

SWAN Staff:

9. Dawne Tortorella, Assistant Director, Chair
10. Aaron Skog, Executive Director
11. Scott Brandwein, Bibliographic Services Manager
12. Steven Schlewitt, Information Technology and Support Services Manager
13. Tara Wood, User Experience Manager

Review Notes from April 3, 2019 Meeting

Dawne noted two items that popped out from the prior meeting: (1) What is BLUEcloud? This indicates some Q&A will be necessary at some point for the membership, and (2) SWAN should have a way to say “yes,” rather than “no” but to a larger extent this is more about answering “When?” and “How?”

Quality and accuracy of the data was rated by Clarity Task Force as important for staff and patrons, which was good from a technical services perspective.

The security and privacy of patron information being rated low by Clarity was a surprise to SWAN staff. The group clarified this to some degree that membership is likely thinking “SWAN is taking care of this.” As a library user, it may not be on the top of the list that library information being secure as compared to banks, etc. The library users most often value convenience over security when a PIN is required. “I don’t need this level of security,” would be a likely answer.

Clarity Task Force's SharePoint Portal

SharePoint is a web-based portal for collaboration. Members of Clarity Task Force can use their credentials to log in for document sharing and review. There are three areas of note:

- Documents
- Notebook
- News

SWAN will call Clarity Task Force's attention to this portal when new things are shared. For example, this could include a "parking lot" of ideas to follow up on later.

Of the reps on the task force, only Oak Lawn is using SharePoint (an older version) and they use many aspects, including forums.

Data requirements for good decision-making: Oak Lawn Public Library's Collection HQ demonstration by Angela Romano

Feedback from the first meeting of the Clarity Task Force identified SWAN's BLUEcloud Analytics as needing improvement. For comparison, Dawne wanted to have a member of Clarity demonstrate an alternate analytical tool as way to help SWAN improve BLUEcloud Analytics.

Collection HQ is a software platform offered by Baker & Taylor. It is relatively expensive but easy to use. The demonstration was to show how your collection is performing and how to shrink/weed it. There are three main areas within the Collection HQ portal:

- Scheduling
- Collection Management
- Dead Items, grubby items, and dead on arrival

Oak Lawn has philosophically shifted from a research library towards a public library with popular materials. This tool has allowed the library to move forward with this approach, which required assessing the collection on metrics of usage and trends. They want to use their money for materials in a way that they can justify the purchase or removal.

Oak Lawn began using Collection HQ in July 2017 and they intend to renew the subscription. The demonstration showed clear graphics of the use of the collection. For example, 40% of the nonfiction collection had not moved in two years. Checkout numbers will show some areas of the library collection thought to be popular is in reality not the case.

Some reports are run on a schedule determined by the library staff. The collection areas are divided up by staff who are responsible for reviewing the performance of the collection.

Graphics include bar graphs, donut graphs of circulation by number of checkouts. The turnover rate (TOR) in Collection HQ turns on after 1 year of data is accumulated. Colleen White noted the TOR is also important at Oak Park. This led Clarity to ask the question of "why can't BLUEcloud Analytics provide a good TOR?"

Implementation of the Collection HQ involves a consultation of how the library collection is divided. This meant Collection HQ staff met with each library department, and the eventual result are ranges of call numbers or collections that can be divided up by library staff.

Collection HQ reports show “Advised to remove” and “Maximum number to remove” within a section. There are other recommendations for “Total Dead” and “Total Items” which are based on thresholds the library decides.

There is a feature called “Standing Order” which is somewhat inaccurate in its name, but it does allow a collection selector to determine what authors to purchase and more importantly the number of copies. Angela says this is enormously helpful as a guide for OAK LAWN.

The differentiation of items circulating through checkouts by Oak Lawn patrons versus RBP or ILL is not necessarily important to Oak Lawn, particularly with the fiction collection. OAK LAWN allows new fiction to circulate and go out on ILL.

The administrative interface allows additional library staff users to log on and divide the responsibilities among staff.

The numbers and performance now drive the selection and removal of items. The long-held beliefs and assumptions of some library staff have been challenged by the evidence that “your collection section is not being used.” The adoption of this tool allowed staff to see what they thought was happening with the collection but could not pinpoint. The heavy weeding the tool recommended was a bit scary at first.

The number of libraries in SWAN using Collection HQ is 10 (Carol Stream, Eisenhower, Glen Ellyn, Geneva, LaGrange, Oak Lawn, Oak Park, St Charles, Town and Country, and Tinley Park). There is a forum that meets annually for the customers of the product. The CCS consortium has a subscription to this product for all its member libraries, but the customization of the product by library is essential to its adoption and use. The experience expressed by Michelle was that her former library did not use Collection HQ due to perhaps a lack of configuration.

A consortia wide implementation could help with preventing removal of a last copy within the member libraries, but is this really necessary to avoid?

Summary of why Collection is useful and successful at Oak Lawn Public Library:

- The visualizations
- Export to PDF, Excel, and other formats make it easy for staff
- Customizations
- The responsiveness of the customer support

Kristina Howard noted that the enthusiasm that Oak Lawn staff have embraced the tool have also made it successful, as another library she worked for did not use it nearly as effectively.

Data requirements for good decision-making: Discussion on analytics and needs of membership

Last meeting, Dawne noted that BLUEcloud Analytics (BCA) is a pain point. The changing environment, the volume of reports is overwhelming, and that once you find a report, you better schedule it so you can find it later. Originally, SWAN used the SirsiDynix recommendation to create individual accounts to log onto BLUEcloud Analytics. But over time we have found this to be unmanageable, and the individual

accounts that show no activity will be purged. There are library shared logins posted per library on the SWAN support site, which are displayed to the library directors. This is better for SWAN and libraries to be able to see everything scheduled, view new reports SWAN creates for the library, and allow for better instruction.

For Downers Grove, they have moved to a shared approach. They formed a data team that decide on naming convention of reports and columns, and they help each other.

Clarity Task Force had questions on how to move towards the BLUEcloud Analytics shared login approach Dawne outlined. SWAN will assist a library that needs to move towards a shared model and sending a help desk ticket is a good starting point.

SWAN questions for Clarity:

1. Do you think it is possible to move towards a common set of circulation reports? Let's discuss the direction we are going, not the reports we have now.
 - The approach of having every item and every possible data point and narrowing it down was one recommended approach
 - There are common reports every public library will need, such as IPLAR
 - Having descriptions with the field of data in the report description would be a huge help
2. If this approach is feasible, where do we begin and who needs to be "at the table" to get us there?
 - Asking directors to suggest staff to be included
 - Approach the user groups in SWAN, find out the baseline requirements, e.g. "we need at least this," and then match up the data
3. Do we start with a clean slate or a prototype and allow them to react to it? Example, of a monthly snapshot?
 - Prototype was discussed and agreed as the best approach
4. Inconsistent policies lead to inconsistent reporting of data – are libraries able to understand the implications of their policy decisions on statistics?
 - Within each library there needs to be some consistency, but SWAN also needs to provide a consortia-wide framework.
 - Examples of established data points: Item Categories, age groups, genre, Item Types used for similar items.
5. Is having comparative data across the consortia valuable?

- It might be having some overall performance of the consortia as a collection, as a way to put your library dollars towards collections that will be used.
6. What approach is best for teaching these skills? Do we need standard reports/direct delivery for the majority and the ability to query and manipulate data returned for a select group of analysts?
- Conduct a class approach with online supplemental material (written documentation, videos) was agreed to be the best approach
 - A hands-on master class with certification is warranted for creating expertise in the library, who can then share and teach others.
7. What is the threshold of time when a class is no longer effective? Length of time, open labs, etc.
- Teaching a baseline with the data verbiage will be important, particularly if the library individual is going to use it all of the time.
 - Create an introductory video of what Analytics can do.
 - Moving classes around geographically will help, particularly with traveling through the suburbs. Some entire departments cannot even leave, due to shift requirements.
8. Could the data be standardized for the whole consortia, but offer the customized/advanced training approach?
- Yes, the “base” could be provided, and the libraries that do not participate and attend training should not be granted the higher level tools and access.
 - Making the leap to use BCA exported data and create visualizations is much more difficult than assumed at first.
 - Having a recommended number to remove such as Collection HQ does, i.e. the analysis, is very important.
 - BCA can provide the dead, grubby, and DOA that Collection HQ does is possible, so this line of questioning is to assess should SWAN dedicate time to achieve this.

Role/time-commitments of members and SWAN staff in development efforts: SirsiDynix Strategic Partners Program & BLUEcloud Acquisitions Phase III Pilot

SWAN is starting with a BLUEcloud Acquisitions pilot starting June through October. This is with St Charles and LaGrange. This pilot will be a short, focused, set period of time. The role is to impact the product, not decide if we can move to the product. We would like to see if new libraries that wish to use Acquisitions in SWAN can begin using it. The waiting time might be a few years before this product is ready.

BLUEcloud staff client: BLUEcloud Circulation & BLUEcloud Cataloging

There is a likelihood that these new staff interfaces may be ready for niche areas, such as public service areas. The big question is what is the expectation from the membership on how much time should SWAN staff spend on these activities?

Reaping the benefits of involvement with these products will make them ready for SWAN sooner, rather than waiting two years and then finding out some features are not ready for us.

Kerry noted these BLUEcloud staff interfaces are so important; WorkFlows needs to be “fixed” as the cataloging tools are very old. Cindy and Kerry thought it was so worthwhile getting involved.

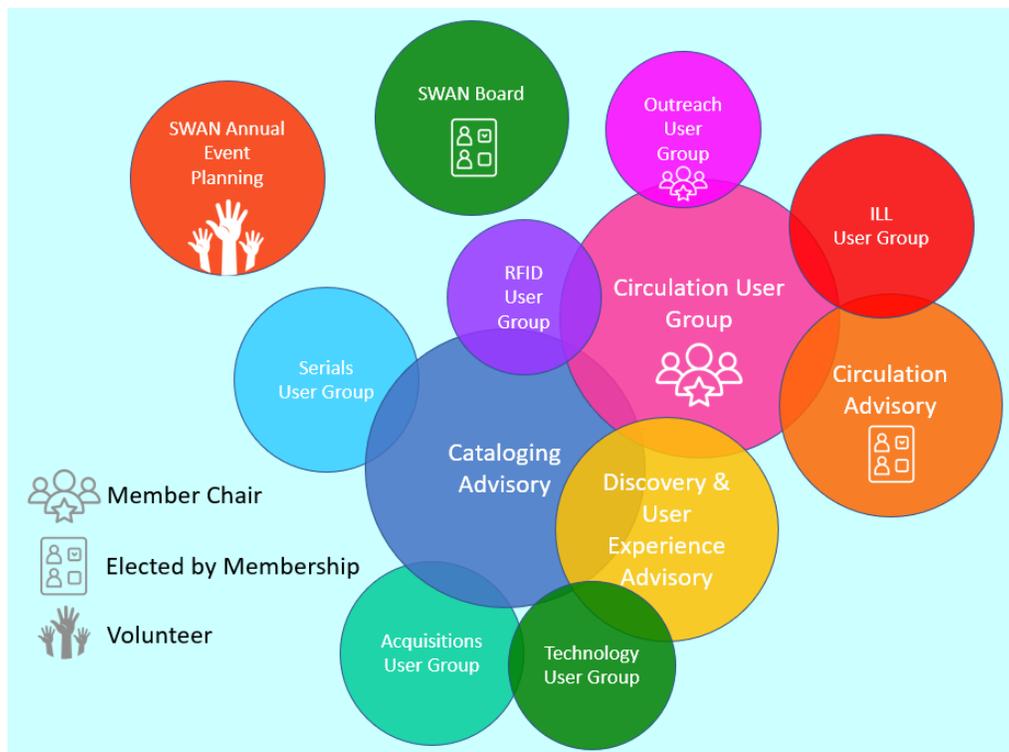
Discussion on this topic covered the following:

- Is the two-year timeline feasible? Is having a year of dedicated work with one group of libraries and then shifting to another group a way to spread out the work load?
- Are there grants that SWAN could seek out that would help with working on extra products?
- Is this level of involvement better for larger libraries with more staff?
- How much involvement is personality and leadership driven? Some people thrive on change and learning new ways to solve problems and are eager to participate in these projects.

There is an opportunity to say we can make the staff tools better. How we market it and sell it to the membership is an important aspect of this.

Review of existing SWAN groups/meetings

Dawne provided an overview of the groups. The packet has a diagram of the groups, the people, and work that is going on with these groups.



Advisory Groups led by SWAN staff with membership and provide input on standards, policies, system changes, projects. User Groups are led by membership, and have discussion on topics, and focus on networking with colleagues

1. Acquisition User Group (x2 year)
2. Circulation User Group (x5 year)
3. ILL User Group (NEW x3 year)
4. Outreach User Group (NEW x4 year)
5. RFID User Group (x2 year)
6. Serial User Group (x2 year)
7. Technology User Group (x2 year)

Discussion: Overlapping work and collaboration – how can SWAN advisory, user groups, board and directors embrace a shared vision/workplan?

The time commitment within the membership brings the question “Are we using these groups effectively?”

1. *What is the most effective way for networking within our consortium?*

In terms of effectiveness, the email lists are the lowest barrier for entry. Some of the Clarity reps say they are subscribed to watch discussion, and the answers to a question are often answered within a day.

2. *Which groups are working, which are not? What are markers of success or dysfunction?*

The RFID User Group is not working well. The original idea of having a focus on the standard data model for SWAN never panned out due to various reasons, one of which is the adoption slowed down. Ahren is skipping due to just complaining about vendors. Kerry noted that the RFID User Group is helpful to a new library implementing RFID.

Circulation Advisory needed a discussion on how to get things back on track, and this really helped. The elected reps really help focus the group with a set of tasks they want to accomplish.

Also key to the success of any of these groups, is a good facilitator and good facilitation skills.

The Outreach User Group and the Circulation User Group are successful in that SWAN helps get the meeting arranged, and the group leads it. The membership leader sets the agenda and runs the meeting. During the Circulation User Group meeting, a focus on the agenda is important: if it is not on the agenda, it is not discussed. There is a shared training component within these two groups.

Discovery and User Experience Advisory Group (often called DUX) is also doing well, according to Angela and Ahren. This is a group that could not necessarily be led by member staff. The group is allowing these libraries to learn and utilize user experience testing, which has inspired library staff to take what they have learned and use them at their library.

3. *What topics or groups are not well represented?*

There has been discussion on a public service user group option. Analytics has been suggested—which if SWAN is going to make a big push for, could help with training and direction. Electronic resources (from a technical use standpoint) is also an area seen as having a need.

4. *Is it possible to have some groups combined?*

It makes sense to form a user group for cataloging. There could be some benefit to combining cataloging, acquisitions, serials users group, and making a meeting be a longer day, with bookended agenda topics for serials and acquisitions staff to come to that portion of the meeting.

It was noted that the “optics” for putting out an effort to have these groups is beneficial for SWAN.

5. *Should the groups be elected, selected or volunteer-based? (Self-nominated versus selected)*

Clarity determined the goal of each group should determine the way it is comprised. What is working for Circulation Advisory is not necessarily going to work for DUX.

Location of the meetings has been experimented with over the years. Circulation Advisory had a “Circ Mentors” group that conducted training held at a different library location. A long drive to a meeting can impact attendance. But overall, the more central like RAILS Burr Ridge, the better.

Clarity Task Force Calendar Setting (Date/Time/Place) through June 2020

It has been difficult to set a standard date for everyone, but the suggestion was to have 2nd Wednesday of the month. The original suggestion of the 1st Wednesday of the month does not work for Amy. The conflict for the 2nd Wednesday for Michelle, but she can make it work with her storytime obligation (Thank you Messenger and Michelle!). These will be posted in L2 and on the SharePoint portal.

Is the time of the meeting a problem? Going to 12:30 p.m. is okay for the group.

Next meeting: Wednesday, June 5 (10-12) -

<https://www.librarylearning.info/events/?eventID=28763>

Respectfully submitted by Aaron Skog