

SWAN Clarity Task Force

Notes

Wednesday, July 10, 2019, 10:00 a.m. – 12:30 p.m.

Introductions & Welcome

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 June 5, 2019 Meeting

No changes, the notes were posted a week after the June meeting.

Plan for Gathering Insight: Screen Recordings, Journaling, Focus Groups, Interviews

Determining the reason for discontent and unhappiness within WorkFlows and various modules requires ways for SWAN to determine concrete problems and find solutions. Dawne asked the Task Force to comment on the concerns with the methodologies shared in the Clarity Task Force.

Downers Grove Comments:

Amy Prechel shared the outline of the Clarity study with the library management team. The initial concern was around the screen recording and patron privacy, particularly with the software recording/capturing patron checkouts. The use of journals/diaries was also questioned, as their purpose was not entirely understood.

Elmwood Park Comments:

Ahren Sievers said there was no problem with circulation staff in completing the recordings. They understood the recording software would only record WorkFlows activity. The journaling will be most useful in allowing library staff to note the frustrations they encounter.

Ahren noted that the recording could also point out “false positives” such as a Topaz signature pad issue, which can help identify what is a local issue, e.g. a software driver installed on a Windows OS version, versus a true SWAN issue with the WorkFlows.

Technical services staff are also ready to participate and journal for Clarity. Recent internal documentation work shows that the steps needed to complete tasks are long, resulting in lengthy documentation (35 pages and longer).

Oak Lawn Comments:

Angela Romano shared there was no concern on the recording, the circulation manager is on board with the idea. Angela is supportive of the study, in that “You cannot just say “Sirsi is terrible” and not provide the reasons why.”

Batavia Comments:

Kerry Halter shared that some of the backroom circulation functions that are more in depth mean we should consider the location of the recording software. At Batavia, the youth services team often complains the most about Symphony and Enterprise, which Kerry noted is the opportunity to get their input and voices heard.

Melrose Comments:

Cindy noted that various desks at Melrose will tackle placing holds or processing holds, so this is not always the circulation desk. She recommended Clarity representatives be empowered to determine ideal locations within their library to conduct the study.

Messenger Comments:

Michelle Kurczak shared some resistance within Messenger on having the time to complete this activity, where staff have problems tallying other activities related to routine library functions (tally sheets, etc.). Summer reading was raised as the busiest time.

Tinley Park Comments

Kristina Howard shared that the Tinley cataloging department would like to help, but the initial draft of activity does not capture their concerns.

Conclusions

- Dawne will help Clarity reps explain how we will protect privacy of patrons within this activity.
- We need an introduction that explains the purpose of this activities, so we find the things that are most frustrating to staff.
- We need to detail the journaling purpose and answer the question, “where did you encounter a frustrating moment with a patron?”
- Technical services/cataloging staff will need a journaling activity.
- This activity initially will only be for Clarity Task Force libraries, which means 8 libraries will have a key role in helping create solutions.
- Journaling activity for Clarity reps needs to be explained in depth so they can explain this to those staff involved at the 8 libraries.

Is there a negativity at a library leadership level? Does this require Aaron to work with library directors in some way to set a tone and problem solving required? That the director needs to set with managers that this will result in improving software and services through SWAN?

Journaling Discussion

Discussion around the journaling

- Are we targeting circulation only?
- Do these questions make sense?
- With two journals, could it be divided between 2 staff for 2 weeks?
- Are people emotional about this and SirsiDynix? Is this a memorable issue, annoying issue, or along the lines of “I feel like a failure” because I didn’t know what to do?

There is some intentional vagueness within the purpose of the journaling, so we do not prescribe ahead of time what we are attempting to capture.

The goal is to write down an interaction with a patron that involves the software, good or bad, and what did this mean to the staff person within that situation.

There are some concerns about having to explain this to staff, which Tara said is normal for this type of research activity. There is always apprehension at first, but staff will get over this.

Examples of personas for journaling

Ana: Adult/Young Adult Librarian, with MLS degree, on a service desk 8-10 hours per week and are a manager. This desk is dedicated to AV activities.

Bianca: Circulation staff scheduled part-time with desk time and back house time in rotation.

Maxwell: technical Services staff that is part-time involved in acquisitions and cataloging. They work primarily in the back of the house.

- Real-time journaling after patron activities
- Date and staff initials
- Interpret the questions or decide not to answer it if it does not apply

Example Journal

"I am in WorkFlows performing acquisition activities, I am looking at an EDI retrieve report. I use the find "error" text binocular function to see the "Errors occurred while retrieving files in BWIBOOK." I look at my finished reports, I look at the errors within these reports. Maybe I should do a support ticket, should I live with it? It frustrates me. I do not know what to do next."

Write down date & time. This could be 3-4 days in tech, a few days in youth services, a few more days with circulation staff.

Recording Screen Activity

The focus initially should be with circulation staff, with the intention to expand this to other areas.

Avoid having 3 circulation computers for 10 minutes recording.

Clarity reps described a segmented approach where patron registration is at one station, check-ins at another station, etc.

The desire is one recording to help collect a busy terminal with a lot of activity.

Suggested Recording Times Discussion

Synchronized time benefits—if there is a problem at the same time at every library, this could capture it. But is this the issue we are trying to capture? The variability across the consortium would be reduced.

Is 10 minutes too long? Reps thought it was almost too short!

The week of July 23rd date is good for the majority of Clarity, with perhaps Tinley due to a circulation manager vacation.

The goal is to be "minimally invasive."

Library Staff Interviews

Tara Wood and Crystal Vela went to Acorn and Alsip to interview circulation supervisors to conduct interviews. The expectation was we would be opening pandora's box, but the issues found were otherwise. These were specific activities such as setting closed dates and searching.

Next up is Itasca. Billing is an area that we want to zero in on later.

There will be a summary of the interviews and questions for Clarity at the next meeting.

Focus Groups Discussion (see packet page 16)

These are intended to be facilitated discussion among various functional areas. This is open to anybody but would like to see it limited to one rep per library.

The concern is this will be an “airing of grievances” or a belly ache session. The focus group would not be for the 8 Clarity libraries, but open spots could be filled later.

Will we succeed in 28 people from 28 libraries? It will depend on the timing and schedules.

Is August good to host 2 focus groups and have 2 in September? Hosting at various locations, such as 4 different will help give us a broader range. These sites were decided as the initial focus group locations.

1. Fox River: Batavia
2. South: Tinley
3. North: Oak Park
4. West: SWAN HQ

The preferred space should be for 10 people, such as a board room or medium sized space.

Mock Focus Group Discussion

Dawne walked through the focus group questions using Clarity reps as a mock test.

This will not be “SWAN heavy” so it will be 2 SWAN staff present.

Should the questions be provided ahead of time?

- Give a list of topics, but not the questions
- Allow staff to think ahead of time, but not let them predetermine answers

Clarity agreed Dawne is on the right track with the questions and facilitation.

Report on Cataloging Standards (Kerry Halter, Batavia Public Library)

The group came out of a demand for a codified rule-set that did not exist a year ago. The documentation was old, and it was only for 6 cataloging libraries. This group is much larger now, with 18 libraries, so the starting point of the discussion with the full group required a smaller set of cataloging staff to review the standards. The approach is to reexamine everything, rather than use the precedent of prior rules and standards.

This group has started out going through MARC records and discussing which areas of the tags need some consensus on what to do. This is a start on where there are issues and how to solve them.

One issue as an example is the indexing of ISBN and UPC numbers.

Online Forums and Cataloging group (Scott Brandwein, SWAN Bibliographic Services Manager)

Using this smaller standards group, SWAN is trying out a Community Forums based on the software Discourse.

SWANx19: What is BLUEcloud?

There will be a SWAN presentation on this topic, which originated in an overview from the first Clarity meeting.

Role for Clarity Task Force members to seek input/network

Is there a role for the Clarity Task Force members to have at the event? Two reps could sit at a table. Perhaps a poster session. A bowl of candy.

Some of the Clarity staff are on vacation during the event.

Next meeting: Wednesday, August 14 (10-12:30)