

SWAN Circulation Advisory Notes
July 17, 2019

Committee members present: Stephanie DeYoung (BLD), Sue Feddersen (BVD), Cindy Maiello Gluecklich (MPS), Sandra Leyva (AMS), Julie Lombardo (WRS), Victoria Muraiti (RFS), Cheryl Pawlak (DGS), Debbie Sheehan (INS), Brittany Smith (WMS), Peggy Tomzik (ESS), Thomas Webb (MTS)

SWAN staff present: Crystal Vela, Samantha Dietel, Rudy Host, Steven Schlewitt, Michael Szarmach, Dawne Tortorella, Vickie Totton, Tara Wood

Visitors present: Juan Estrada (LSS), Jane Young (ADS), Norma Rubio (CTS), Crissy Barnat (CNS), Leslie Hartoonian (LGS), Marla Cole-Wieringa (MTS), Pat Sinacore (WCS), Kathy Zaleta (HSS), Teri Wilson (GHS), Elizabeth De Jong, (SHS), Pat Sinacore (WCS), Sheri Starr (PTS), Meghan Moran (OLS), Mary Malach (MED), Felipe Altamirano (MWS)

25 SWAN Libraries represented.

1. Introductions
2. Review of Notes, May 15, 2019

River Forest is fine free for all patrons – notes were updated to reflect this.

3. SWAN Updates & Discussion

a. Circulation Policy Homework

Crystal, as chair, recommends that Circulation Policy review be moved to an annual process with concerted review and effort in this process. As such, the group was asked to begin homework on reviewing the policy in detail and make suggested additions and changes. Bring those suggestions and discussion to the September meeting where ideas will be worked out in group activity. Circulation Advisory will submit any recommended changes to the SWAN Executive Director for review prior to submission to the SWAN Board.

b. Patron Field Consolidation

The work plan for consolidation is expected to conclude by the end of the week. All changes were applied in the test environment to determine impact. Close to 700,000 patron records require update. About 200,000 were completed last night. Big thanks to Dave Pacin for this work.

c. BLUEcloud Circulation update

BLUEcloud Circulation was a concept shared early in our communication with SirsiDynix. The BLUEcloud staff client is now at a development stage where some member teams are ready to evaluate capabilities of the BLUEcloud Circulation client.

The product is not near implementation at this point, but our input is critical to the development of the product. As BLUEcloud staff client is cloud-based and runs within a web browser, account management is at an individual level and therefore requires more oversight and coordination.

Member feedback is critical to the ongoing development of the BLUEcloud staff client – more libraries may be involved in the future as SWAN remains involved in the continual development of this next generation staff client.

d. Print Notices/Go Green Campaign

We primarily need to determine who is getting print notices and how can those patrons be identified.

Batavia catches outliers in notification by going through reports, approximately every other month, to identify patrons without email addresses. Stephanie filters this report by notice preference which leaves people who have blank notice preference. The staff goes through each record and updates them based on characteristics of the patron record (do they have a valid email, phone number). Initially this clean-up was very difficult, but now with continuous review it is not difficult. When identifying people that have text preference based on presence of the SMS information, staff change the notice preference to TEXT to make it easier to identify in the future. Now they process about 10 patron records per month in the review.

It is difficult to capture patrons receiving print notices. Even if a patron record has a notice preference of PRINT the patron may be receiving their notices via email or SMS. The only notice preference used in determining how to deliver notices is PHONE – all other settings are not reviewed in report selection.

Discussion included consideration of not sending print notices for 1st overdue, sending 1st overdue – but eliminating 2nd overdue, to not printing any print notices at all. Conclusion was that we should institute the following plan:

- Simplify the notice process – eliminate notice preferences that do not determine behavior. Provide additional education and resource on how notices work
- Continue clean-up of patron records to ensure alternative notice delivery options are used, if available
- Request reports from Unique with a breakdown by library of which notices are generated

The group unanimously agreed to this process. Stephanie and Sandra will work with Crystal to write documentation and assist in membership

awareness/training.

- e. Book Discussion Documentation Update [Exhibit B]
Crystal shared the addition of “neighborly practice recommendations” in best practice documentation. SWAN cannot effectively or efficiently be circulation police. It requires our community to work together to think of how library/staff actions affect other libraries – our neighbors.

Clarification was asked regarding extension of due date on the book discussion card. Basically, if the item is yours, you can modify the due date. But, if the item is from another SWAN library, do not extend the due date. The Circulation Policy says you can extend the due date up to 6 weeks, but this is for an individual (e.g. a member of the book discussion group, once they check out the card), rather than on placeholder cards.

It is important to share these neighborly and best practices with Book Discussion leaders, as well as train them in how to place and suspend holds so that they are not ordering items far in advance of their discussion.

Book Discussion Best Practices -
<https://support.swanlibraries.net/documentation/66652>

- f. SVA Failed Calls report

Vickie shared that there are now two SVA Failed Calls report. One includes pick-up notice failures and the other overdue notice failures. You can now review patrons that may not be receiving their overdue notices, as well as hold pick-up. Sort these reports alphabetically to identify your library code. If you do not see your library name in the overdue or pick-up notices, you do not have any patrons with missed calls.

- g. Billing Threshold [Exhibit C]

Discussion continued from earlier meetings related to disparity between how libraries identify items as unusable and how to come to consensus on these decisions that impact billing.

Looking through the past year of quarterly billing does not show any data outliers. The data shows that overall libraries bill for damages at a relatively consistent rate for ILL between SWAN libraries.

Libraries did share that they have received letters addressed to their patrons to distribute for collection of damages. Libraries should not be sending notices to

other library patrons, even if distributed through the patron's home library. This need for notification is handled automatically through the practice of quarterly billing. Discussion needs to happen between SWAN libraries, not between SWAN item library and patron from another library. This is a long-held courtesy between SWAN libraries. An interlibrary loan is a transaction between the two libraries, not the owning library and the patron.

Discussion included the need to change both language and sentiment. Why is the library culture such that somebody has to pay? We need to change our conversation pattern between our consortium colleague libraries from "we will bill your patron" to "we are seeking reimbursement." Changing culture from "library police" to "part of the community" is something that happens at the library level and is led by management at each library.

Also this discussion needs to include Selectors as they are often the staff making these billing decisions.

A simple rule to follow is: if you have to look for damage, the item does not need repair/replacement – and therefore is not unusable/damaged in terms of circulation.

We collectively spend a lot of time discussing this issue although data shows that it does not happen with great prevalence. Instead, it tends to lead to annoyance and bad feelings between libraries – the problem is intensified due to the unpleasantness, not significance of occurrence.

This problem does not appear to be improving. Would it be helpful for SWAN to research arbitration for a set time period to really see what the problems are? If there are patterns, and whether the issues can be addressed with specific member libraries – or if the issue is simply an annoyance that we need to not spend as much time and energy on.

h. Circulation Advisory Election

Crystal reminded the group that elections are held in October with new member terms starting in November. To even the expiration of seats, Sue Feddersen agreed to stay on for an additional year.

We are looking for a shortened timeframe for the election process this year. The self-nomination form will be posted in September, followed by a 2-week voting period in October.

Crystal asked for ideas on roles and responsibilities of this group, as well as reviewing the group charge. There will be additions to the charge to add a level

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of responsibility in helping SWAN in training efforts, assisting in documentation, co-presenting at meetings and events, serving on working sub-groups, mentoring colleagues at other libraries, and helping with new library migrations.

Other ideas shared by the group included developing a New Circulation Manager Orientation program to help new managers navigate in the consortium. Site visits to libraries from Circulation Advisory members with staffing changes can also help develop partnerships and confidence. SWAN staff may also be involved in the site visits, but the value of member visits with each other is where the most valuable experience is shared.

i. Patron Email Status Demo

Rudy Host demonstrated the new ability for library staff to check if a patron received their notifications via email. Sendgrid is the bulk email service we migrated to with the migration to the cloud. With this new service we now have additional tools we can access to check status and delivery of email.

Documentation and access will be under the Help section. Enter a patron barcode – it queries both Symphony and the Sendgrid system and pulls back up to the last 20 emails sent to the patron in the last month along with status.

The subject indicates the type of notice. Checks if patron email is formatted incorrectly. It also checks if a patron marks a SWAN message as SPAM - messages are no longer delivered. Tool will indicate this and link to another option allowing the library to “un-SPAM” that indicator.

Status message of “processing” means that Symphony sent out a message, but the email provider has not yet delivered. There is a threshold that will retry for up to 3 days. The timing will help patrons determine if someone might have received the email in a shared email account.

If you put in a barcode and they do not have an email, the tool will tell you that. Old email addresses are not cached so it is only checking the current email account in the patron record.

Rudy received a loud and long round of applause for this tool!!

SWAN News Post: <https://support.swanlibraries.net/news/2019-07/66761>

Patron Email Status Tool: <https://support.swanlibraries.net/help/patron-emails>

Additional discussion (not on agenda):

- Debbie Sheehan shared that their Management Team took a road trip to Cedar Rapids. Library totally flooded out a couple of years ago and had to rebuild. They are on SirsiDynix. Indian Prairie is looking at cutting down on service desks, providing more self-service options for

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patrons. In the Cedar Rapids lobby, they had a monitor with a link “Get a Library Card” – enter info, click submit and they are already in workflows immediately. The patron then goes to service desk to get the physical card. Staff verify id and get library card. This would be a great way to make some efficiencies at the service desk.

Steven shared that SWAN staff are currently in the early design stages for an online patron registration and self-service. This will be built in-house and staff is working with Oak Park on the design specifications. We are working on this for the remainder of the year. We will be working on duplicate checking, digital-use only cards, and the new use case presented by INS.

- Debbie also asked the group if it is worth reconsidering how long items stay on the hold shelf before they expire. Group agreed this topic could be put on the agenda for future discussion. More data is needed to determine how many items are expiring on the hold shelf, and if libraries are processing expired holds daily.

Overall holds management and processing present challenges across all areas of the library: how we catalog items, how patrons place holds through Enterprise, patrons’ needs around picking up holds, how we fulfill holds, how the system prioritizes items to fill holds – we need a universal discussion across our user/advisory groups to understand complete impact.

- Question was asked on whether fine-free libraries still used collection services. Most agreed it was of even more value to help get items back. Items are still billed at 42 days for all libraries whether they charge overdue fines or not. The library can choose to have no collection fee, but still submit to a collection agency to aid in the return of long-overdue material. Helen can work with libraries on reviewing, changing, setting up collection service parameters.

No Circulation Users Group meeting in August – see you at SWANx on August 16th.