

SWAN Clarity Task Force

Notes

Wednesday, August 14, 2019, 10:00 a.m. – 12:30 p.m.

Introductions & Welcome

Task Force Membership:

- Kerry Halter, Technical Services Manager, Batavia Public Library District
khalter@batvaiapubliclibrary.org
- Kristina Howard, Adult Reference Manager, Tinley Park Public Library
khoward@tplibrary.org
- Michelle Kurczak, Head of Youth and Young Adult Services, Messenger Public Library of North Aurora, MKurczak@messengerpl.org
- Amy Prechel, Head of Access Services, Downers Grove Public Library
aprechel@dglibrary.org
- Angela Romano, Fiction and Reference Librarian, Oak Lawn Public Library
aromano@olpl.org
- Ahren Sievers, Reference Technology Librarian, Elmwood Park Public Library
asievers@elmwoodparklibrary.org
- Colleen White, Cataloging Librarian, Oak Park Public Library
cwhite@oppl.org

SWAN Staff:

- Dawne Tortorella, Assistant Director, Chair
- Aaron Skog, Executive Director
- Scott Brandwein, Bibliographic Services Manager
- Steven Schlewitt, Information Technology and Support Services Manager
- Tara Wood, User Experience Manager
- Crystal Vela, User Experience Consultant

Please note, Cindy Maiello-Gluecklich, Director, Melrose Park Public Library, has resigned from the Clarity Task Force.

Review Notes from July 10, 2019 Meeting

No changes to the notes.

Gathering Information: using user experience methodologies

Feedback on the Journaling Process

Discussion on the journaling process took an hour of the meeting. Some reps noted that their journals did not contain a lot of entries, which Dawne noted the goal was not as much quantity versus quality.

Colleen (Oak Park): searching with the Dole and Maze with the Main libraries was noted as a desired feature. Enterprise comment based on a patron needing an on shelf, but this is due to the low use of WorkFlows within Oak Park. The other Enterprise comments were positive.

Kristina (Tinley Park): the journal collected a lot of feedback; Two weeks with one part-time person, and two weeks with another part-time person. The complication of finding movies in Enterprise and placing holds in Symphony were noted. They noted the impatience the patron feels when staff are bopping between Enterprise, IMDB, WorkFlows. The number of comments left by technical services was relatively low.

Angela (Oak Lawn): the use of Enterprise is the first step for library staff as it is more user friendly, and then moves to WorkFlows to place the holds.

Amy (Downers Grove): gave one journal to youth services and the other to adult & teen services. Screen shots were provided within the journal. Youth services noted multiple times the difficulty of searching for items in a series. For series, WorkFlows will not necessarily display the volume number, but put it in the call number, so determining the series number is tricky.

Michelle (Messenger): the circulation department expressed a lot of frustration. Some of this is with holds and placing them. Some internal procedures were also revealed that require training the staff on the correct step. The length of time to complete work was noted by one staff, and the frustration levels involved. Staff added screen captures and put them into the journal. WorkFlows logins were also noted as complicating their work (REFILL, CIRCSR, etc.). The Acquisitions processing at Messenger uses a step for invoicing, which other libraries do not use, so the frustration on the length of time to complete orders is local to Messenger and affects a single person who had a less frustrating experience when processing in the smaller MAGIC consortium. There are ILL record cleanups noted for temporary records created.

Ahren (Elmwood Park): the journals distributed to technical services were not completed. The adult services staff did a great job of documenting search issues. The journal was left on the desk and multiple people contributed entries.

Kerry (Batavia): it rotated between departments, but there was a staffing survey taking place at the same time, so this affected the amount of journaling completed. E-content listing in Enterprise, picture book limiters were noted. Kerry noted a few days of cataloging frustrations within department activities such as the data in MARC 505 fields, illustrations to a 300 field, content and summary notes in 520

fields, incorrect dates in a 264 field, etc. Acquisitions processing frustration appears to be time-based, where 5:30 a.m. processing carts is faster, while in the afternoon it takes much longer.

Update on Time Study

Refer to Clarity packet exhibit pgs. 9-13 or for Clarity reps, the updated document in the Clarity Task Force online portal.

Feedback on this activity:

Clarity reps noted that the apprehension of this recording initially subsided after the activity was completed. This could be used in other areas such as desk shift staff or back-of-the-house processes.

The time slice being at the same time was interesting, in that on a Friday time slice, it was quiet across the board (it gets busy near closing time).

All of the recordings will be deleted after this Clarity meeting, now that the activity has been prescribed.

Dawne summarized this was a valuable activity overall and this activity will likely be expanded to other departments. Six libraries participated within Clarity (one library circulation manager was on vacation during this screen recording period). SWAN staff reviewed each recording and noted all of the keystrokes and clicks. It was observed that some staff minimize WorkFlows windows and other unexplained activity, but overall the most common tasks were noted. Checking in items was most frequently used, along with modifying users, and checking out.

Other activity noted was collecting data that is not allowed in the SWAN Circulation policy. This is likely old practice that will need to be reiterated as to why SWAN does not want this data collected.

The configuration of barcode scanners was also noted that some recordings show that staff need to hit <ENTER> while the scanner could be programmed to provide a <ENTER/Carriage Return> automatically. It might be purposely different depending on the department or need.

Pop up routing windows was also interesting to see was not displaying, which SWAN staff confirmed later was due to the screen recording itself, not because library staff are suppressing the pop-up.

Some recordings show check-ins of items not checked-out. At Oak Lawn, they check-in items on display so that items returned there by mistake are caught. Batavia does perform a double discharge, which would not have been recorded.

One re-registration of a patron from another library, which can be complex when a library using Outreach has their patron move to a new SWAN library that is not using Outreach.

There are a lot of alerts popping up. The length of time these add to the transaction was noted through the recording transcription SWAN staff performed.

Chicago Public Library patron visit was also recorded, which the length of time to complete was noted. Oak Lawn and Elmwood Park noted the challenges with providing services to these patrons, particularly

with registering, placing holds, the limits CPL requires SWAN to put in place for the number of items by format that can be checked out.

Update on Interviews Completed

Refer to Clarity packet exhibit pgs. 14-19

Crystal Vela from SWAN provided a summary of the interviews completed with circulation managers. These were interviews conducted on-site at the library.

Some of what was learned was frustration on paying bills. The SWAN documentation on damaged items was noted as printed out for circulation staff to consult. Some of the misconceptions of procedure and policy were interesting to find.

If they had the magic genie, what could they change? The “cancel” button placement during the transit check-in procedure was noted in the written summary.

Overall these staff were happy with WorkFlows.

Update on Scheduled Focus Groups

Refer to Clarity packet exhibit pgs. 20-22

We have four focus groups scheduled, there are 17 people registered as of August 13th. Of those, two libraries have registered 3 staff each across the four days. So, this means we have 12 individuals from 12 libraries.

The reminder for a call for participation should have “this is how you can help” and “this is how your voice can be heard.” The original call was wordy, which keep in mind was created with Clarity input!

The requirement for one staff person per library could have created a bit of confusion within the library as it requires some internal coordination.

SWAN should send an email reminder before Friday and have this shared at the Friday SWAN Expo.

Discussion on Holds: SWAN’s Demand Management Configuration & Testing Plan

Refer to Clarity packet exhibit pgs.23-32

Dawne provided an overview of the evaluation of holds underway. The group of five libraries is a combination of newer libraries and libraries that are used to the way SWAN has “always done things.”

Ultimately this will be a data driven decision in terms of the final recommendation. The data shared in the Clarity packet shows patterns where the lack of weekend delivery delays the time of filling the hold.

This testing group is only working on the demand management. It does not affect the larger picture which is driven by restrictions on collections and the management of these within the consortium.

Clarity could include more broad recommendations for change if it concludes this is needed to help library users.

Review feedback from April 3, 2019 Clarity Meeting (refer to [online notes](#))

What do your colleagues throughout the library most complain about in relation to SWAN? (from April meeting):

- WorkFlows is confusing, how to place holds
- Not all new titles available for holds is a huge patron frustration
- Patron complaints related to SWAN services, software, etc.
- Local complaints about holds notification — it is constant, low-level problem.
- Patron confusion on Enterprise when placing holds on a new item that is restricted and does not allow a hold to be placed on it by a member library.

Clarity did not discuss the feedback from April 3rd, as the meeting reached its conclusion at 12:35 p.m.

Discussion on Clarity Findings Report: outline and assignments

Aaron Skog provided an outline of the steps to get to a deliverable, which is a recommendation from Clarity using the research findings as a basis for analysis. This could be drafted by November, with a SWAN Board presentation that same month and a Quarterly presentation on December 5th.

Concerns expressed by some of Clarity is that more research is necessary and issuing a report on that timeline could be premature. Others believe Clarity can issue the report with identifying big areas to focus on for 2020.

Next meeting: Wednesday, September 11 (10-12:30) –

<https://www.librarylearning.info/events/?eventID=28766>