

# SWAN Clarity Task Force

## Notes

Wednesday, September 11, 2019, 10:00 a.m. – 12:30 p.m.

### Introductions & Welcome

#### Task Force Membership:

- Kerry Halter, Technical Services Manager, Batavia Public Library District  
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- Kristina Howard, Adult Reference Manager, Tinley Park Public Library  
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#### SWAN Staff:

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

### Review Notes from August 14, 2019 Meeting

The August notes were posted prior to the meeting. The group exchanged a few corrections, which were incorporated into the notes. These notes were reposted.

### Update on Gathering Information: using user experience methodologies

Dawne reviewed the affinity diagramming process used to review the journals and categorize the issues.

### Review Journaling Process - topic clusters

Searching in WorkFlows versus Enterprise.

- The 3 letter codes are a key difference to the search experience.
- Public service desks have widely adopted the Enterprise interface as their primary search tool
- Staff are also dedicated to using the tool patrons use to complete the search
- On the spot demonstration to the public, e.g. flipping the desk monitor around to show the patron

Locating series for books (primarily books)

- Staff are locating the information from alternate sources online, rather than using the catalog.
- Cataloging rules around the volume number need some clarification, as the subfield indicator can be used in some instances and in other instances it cannot.

Items on the shelf that do not trigger a hold

- Trapping a hold within the consortium is leading to some confusion, where an item is available, but at some point (even within minutes) another library filled the hold

Overall, the journaling process captured a lot of issues that might have been missed otherwise. It did not capture if the issue is widespread (Note: this process is not where the preponderance of the issue is tallied. The journaling is designed to capture areas of frustration.)

### **Time Study - corrections and ideas for additional targeted studies**

SWAN staff reviewed the screen recording software and found some pop-ups were not captured, so we corrected the written report to reflect this fact.

### **Update on Focus Groups - 3 of 4 completed, final group scheduled 9/13**

Kerry has hoped more technical services staff were attending these groups. The importance of the focus group also is helping the buy-in of the Clarity research. Some discussion took place around philosophical differences at the libraries.

Kristina shared that the Tinley Park Public Library meeting shared a strong, negative emotion about WorkFlows. There was a desire for a more modern tool available. Some concerns around fines and estimated fines were shared, which was not captured in journals. The use of the tool versus the “attractiveness” of the tool are two competing issues. WorkFlows has some very odd UI quirks, can be viewed as ugly and confusing. The collaborative arena was not an issue, a need for more standardization within cataloging was desired.

The third focus group was held yesterday, attended by 6 of the registered attendees. This group held more negativity towards SWAN as an organization. There were some actionable issues identified. They were feeling like the advisory and user groups were more about SWAN telling the libraries. Four of the six that attended joined SWAN in 2018, so their perspective was coming from a smaller consortium. Communication and user groups was discussed by Clarity early on, but we may want to reexamine these.

In all three groups, the area that gets the most reaction is the loan rules and hold restrictions, and how involved are they involved within setting the rules and parameters.

The final meeting is going to be held at Oak Park, which is full.

### **Holistic Discussion on Holds**

Holds has emerged within all of the research activity as a primary concern within the consortia. The data gathering is a way to assure we have metrics to compare with later if we make changes within our parameters.

### **Review July 24-August 31 data**

The time the person places the hold and it is trapped and put on the hold shelf for pickup. We do not have data on the day the person picks up their hold, but SWAN could capture it.

Refer to the chart in the packet for the September 11, 2019 Clarity meeting. The average days to fill a hold is 11 days, but the important number is the median number which is 6 days. This is impacted by delivery not occurring on weekends, or library staff not processing holds on the weekend.

There are some concerns about popular items sitting on the shelf too long, and the staff are concerned the item could move on to the next patron in the hold queue.

Book clubs will place holds and suspend them for months as a strategy for allowing the patrons to get the popular material. Staff looking at WorkFlows can see these book club users in the queue that are suspended. This can also skew the metrics for holds being filled much later than 7 days.

Dynamic holds processing allows libraries to immediately fill the hold and get the item in the patron's hands faster.

The change in configuration that went into effect this week was reviewed. The demand management in Symphony is working very effectively, but this parameter change will allow the available item at the home library to fill the hold. The report we had hoped to allow libraries to pull the item's available locally was not in the end successful in generating locally available items that were not on the pull list.

### **Identifying issues related to holds**

Clarity took 25 minutes to brainstorm on issues with holds.

Large number of holds on some items, 1200 holds on a title, but the locally available item at the home library will have the item nearly immediate, if they actually placed the hold. The number of holds could be causing patrons to not place the hold.

Placing a hold on an item higher up on the list, such as a trade paperback, when the hardback has more copies.

The icon for trade paperbacks and hardcover books is the same in Enterprise. Multiplicity of title records for paperbacks and hardcover copies.

For patrons, if it is an on-order item, they cannot place a hold on the item for some libraries. Others allow this and some even allow holds by patrons other than their own to be placed on their on-order

items. The myriad of potential combinations causes confusion when sometimes an action is allowed, other times not.

Limiting new items to only the home library patrons.

“Suspending” holds for non-residents that the library is not going to fill.

SWAN is working with SCD on a possible solution for adding an item that is owned by SWAN, which allows the hold to be placed. This technique could be used more widely. Scott detailed this limited patron driven acquisitions of music CDs experiment to the group.

Browsing collections versus shared collections. Having a copy of the best seller will help with the angry patron asking why doesn't the library have a best seller? Having consistent behavior and usage of terms for item types would be helpful. For example, browsable collections may use any of the following item types (and more) – Hot Picks, Lucky Day, Quick Picks, Great Reads. No consistency in what these mean in terms of circulation/holdability across SWAN libraries.

Messenger did not share new items, but MAGIC decided to share new items. Now in SWAN, there is no mandate on this issue, so Messenger is rethinking this issue.

Large library purchased 20 copies of the popular title and the “good citizen” aspect of being in a consortium influenced the decision that this large library will share within the consortium.

Would SWAN tools provided outside of Symphony that could help be well received? The discussion showed that it would be valued, could be used more on other days but not every day.

Combo packs are being split up, and the holds get placed before the record is split between DVD and Blu-ray.

Fatalistic confusion that the record is being neglected and cannot be corrected by anyone other than the home library. Examples of a title with multiple foreign languages, audiobooks — appear in front of the book with the most copies. This happens often with classics, which are often school assignments.

Format clustering (FRBR) display would help alleviate some of these problems. There is a desire to weigh search results by number of copies in the consortium.

Michele: copy level holds versus title level holds for book clubs

WorkFlows is viewed as cumbersome by library staff, so they avoid using it to search the item.

Reordering the hold queue is desired but could become the “wild west” if the feature is widely released. Staff need tools to move holds to the most appropriate record to facilitate faster fulfillment of the hold. Technical Services staff needs tools to manage holds placed on an item they are discarding or need to cancel an order on.

Cataloging issues with holds: you cannot remove the item with a stranded hold on it.

Determining the patron's position in the hold queue, estimated wait time.

Hold and copies available could have more transparency on this.

Patron notifications via SMS are arriving, so is it a 3 day notification, a 7 day notification?

Could the item be shared within the SMS notice?

The report showing the last copy or lost that SWAN created is very helpful.

A closer look at managing the hold map may help identify areas for standardization. Standardization could be a corrective action in some of this disparate behavior related to holds. Example: TV Series boxsets work well across the consortium because we agreed on item types and loan rules which are consistent.

We discussed who makes the decisions on what goes out/is holdable?

- Continuation of practice
- Selector-led
- Manager-led
- Different rules are common within a library (e.g. Youth vs Adult)

### Recap of Big Ideas/Goals

The following big ideas were outlined as desires of the consortium. They may require additional resources, introduction of new approaches for supplementing resource demands, and more tools for staff in managing holds.

- Allow every patron to place a hold on all things.
- Allow all items to go out to other libraries.
- Act as good citizens and responsible neighbors

### Develop assessment tool for outlining issues, responsibilities, corrective action, big plans

As we prepare for writing our report of findings and recommendations, the group discussed a template for reporting issues that will help surface issues/problems, while focusing on immediate actions and strategic direction (Big Ideas).

Issue/Problem statement	Responsibility	Corrective Action (what can we do now?)	Strategic Direction/Big Ideas (what are we doing to move us forward or what big ideas are worth exploring?)
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In preparing the report, the importance of tying this report to the strategic plan and a similar method of reporting was recommended.

How we message to the SWAN membership is a critical. Things mentioned to guide our report:

- State reality – what is possible now
- Video tours, show & tell are effective in sharing
- Don't over-promise

- Emphasize what niche process is filled by specific tools/applications
- Consider explaining library services platform analogy as discrete apps much like mobile apps (several different options may be necessary)
- Don't push the problem down the road, what measurable progress can be made along the way
- Identify consortium challenges and opportunities
- Clearly explain what an ILS search and migration means in terms of timeline and costs.

### **Clarity Findings Report: outline and assignments**

This work will be the focus of the next meeting.

### **Next meeting: Wednesday, October 9 (10-12:30)**

<https://www.librarylearning.info/events/?eventID=28767>

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