

# SWAN Clarity Task Force

## Notes

Wednesday, October 9, 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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- Michelle Kurczak, Head of Youth and Young Adult Services, Messenger Public Library of North Aurora, [MKurczak@messengerpl.org](mailto:MKurczak@messengerpl.org)
- Amy Prechel, Head of Access Services, Downers Grove Public Library [aprechel@dglibrary.org](mailto:aprechel@dglibrary.org)
- Angela Romano, Fiction and Reference Librarian, Oak Lawn Public Library [aromano@olpl.org](mailto:aromano@olpl.org)
- Ahren Sievers, Reference Technology Librarian, Elmwood Park Public Library  
[asievers@elmwoodparklibrary.org](mailto:asievers@elmwoodparklibrary.org)
- Colleen White, Cataloging Librarian, Oak Park Public Library [cwhite@oppl.org](mailto: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

### Review Notes from September 11, 2019 Meeting

Some corrections were made and the notes reposted online.

### Review Clarity Task Force Research Report

The Clarity research report is a 49-page document created from the four methods of research: screen recording, journaling, interviews, and focus groups.

- The screen recordings could be expanded to other service areas. While the circulation area was the focus within the study, it could be used in the stickier areas of the libraries we have identified.

- The focus groups and the journaling provided the most useful feedback in terms of identifying problems.
- The focus groups were attended by some of the Clarity reps. It was observed that the representation was mostly public service staff, and not as much technical back of the house staff. This could be due to the frustration and dissatisfaction residing more in those “front of the house” staff.
- There were some aha moments from the last focus group such as hiring staff with experience with WorkFlows. Clarity noted that hires from a “SWAN library” is a bonus as it comes with familiarity of the tools.

### Time Study

These measurements did show that circulation is efficient. It wasn't the area where problems seemed to exist. The amount of data we captured within this method was easy to collect. The analysis was the difficult part.

It was important that we could show the amount of time on average to perform a checkout. We learned that the check-ins are double check-ins. The number of alerts is something we can focus on. This could be explored by alerts set by cataloging on “check for pieces” and libraries with lower thresholds for delinquency. The double clearing could also be a symptom of multiple alerts being cleared by the scanned item, rather than actually checking the item in.

There were also some data cleanup observed that could be simplified such as all caps patron entry.

### Journaling Study

The big themes that emerged from this portion of the study were holds and search relevancy. The comments in the journaling did note some misconceptions which could be clarified later through training, such as the 200 search result limits in WorkFlows (it is only sorting 200 items is a limit, not limiting the search).

### Workflows User Interviews

Tara Wood noted that after the interviews and some “show me” activities that it is not circulation where we have the source of the dissatisfaction. The biggest difficulty revealed by circulation managers was bills within WorkFlows. SWAN's initial concerns were that circulation was a source of dissatisfaction, which is somewhat refuted by the research. The issue is these staff get the most abuse from the public, which is a tough job, but it doesn't appear to be with the software.

### Focus Groups

The groups all wanted to ask SWAN staff questions at those meetings, which SWAN staff politely declined to do—this was about the groups realizing through discussion with colleagues some of their issues were commonly held. SWAN support got high marks, but there was some discrepancy in how we communicate with each other and the networking groups may not be satisfying. The newer libraries may want a smaller method of communication and collaboration. Three of the four focus groups

brought up the old SLS/MLS zone meetings. That said, no one is stopping these groups from meeting on their own. Clarity discussion noted there are other networking opportunities such as LACONI, so why would one organization provide them all? If there is dissatisfaction on networking opportunities, perhaps from a messaging or communication standpoint SWAN has a role to play. This also depends on the role within the library, so the communication dissatisfaction is more SWAN focused which means they want to troubleshoot with colleagues using the same software.

There is some disappointment that not as many library staff turned out for the focus groups. The focus groups brought in 21 libraries. There was under representation from the south suburban libraries. Are there strategies to help with gathering feedback. It seems that adding 20 more libraries would not have changed the issues identified through the focus groups. We have an accurate representation of the issues.

Making sure everyone feels included and has a voice is something that is not a concern in affecting the data of the Clarity Research Report. Somewhere in our shared diagnosis the negative feelings have to be acknowledged and some member driven solution should be provided.

## Discussion on Assessment: issues, responsibilities, corrective action, big plans

Clarity broke up into groups of 2-3 and spent 45 minutes on the following:

1. Issues/Problem statement
2. Responsibility
3. Corrective Action (What can we do now?)
4. Strategic direction/big ideas (What are we doing to move us forward or what big ideas are worth exploring?)

After the group activity, the following was shared.

Holds:

- Restricting the lending of new items
- Placing holds for on-order items
- Message wording in Enterprise on why a hold could not be placed
- Using Enterprise instead of WorkFlows
- Reordering the hold queue due to the hold on the less optimal record.
- How do you explain to patrons how to determine an item's arrival?
- The number of data points around holds determine
- Communication/explanation to patrons could be provided that reflects an accurate understanding of how holds work within the complexity of the holds issue (too many variables—when will it be returned, the condition of the items, the restrictions around holds)
- Page 14 does a good job listing them

Searching: these issues are intertwined with holds.

- Finding the “correct” record, e.g. has the most copies
- Accuracy of searching
- Pages 22-25 lists out the issues from the Journal
- Precise search strategies with the large amount of data
- Returned results with e-content
- Desire to sort results by what is available, on shelf at the library that can be checked out
- What is new fiction, what is on order, what is on-shelf

#### Reports:

- Better organization within Analytics has helped, such as grouping by folders

#### Communication & Managing Expectations:

- Desire for a “Super Tool” versus 3 Tools in SWAN, this is part of a desire for perfection
- Better understanding of the processes so an accurate explanation to the public can be confident
- Communication between SWAN and libraries
  - “No, but...” style of presentation where options are presented instead of the requested solution.
  - “No, but here is why”
  - Edicts from SWAN coming down appear unpopular, but focus groups also indicated SWAN needs to tell everyone what to do
  - Confusion
- Communication between libraries
- Style of communication issue
- Communication of library to patron
  - Having “script” to rely on why something is occurring
- Communication from SWAN to patrons
  - When a library has to charge a patron for another library’s item, they blame SWAN for that (don’t get mad at me, its not my fault)
  - Opportunity to improve notifications with automated notices

#### Training

- Part of the communication discussion, understanding the system better

#### Acquisitions

- Some libraries expressed a desire for some schedule

#### Standardization & Best Practices

- Cataloging standardization, such as the combo packs
- Data quality and data clean up
- Naming convention for new items, lucky day items which can be confusing to patrons, this helps with call numbers
- We can explain our policies to patrons, but they cannot explain the other library’s policies

- Having universal lending for DVDs etc would make is much easier to explain to the public
- Patrons that are smart enough to “game the system” may not be a large issue to warrant common lending
- New libraries should follow a standard set of SWAN configuration, which could be unfair because the libraries currently don’t follow it
- Autonomy versus the single common system
- Is SWAN’s mission not understood and thereby the resource sharing is secondary to SWAN is hosting the library’s ILS/LSP
- Patrons likely see us all as the same, as one library with lots of different buildings
- SWAN has the largest hold map among Consortia SIG libraries
- Isthe tough guy tactic of SWAN standardizing resource sharing parameters and configuration desirable?
- The ATLAS 3-2-1 approach greatly simplified the lending within the region and for OLS

#### Membership Fees

- Math expectation that fees will go down
- The impact of growth and how it relates to operating costs and revenue

#### Next meeting

Wednesday, November 13 (10-12:30)

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