

SWAN Clarity Task Force

Agenda

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

SWAN Headquarters
800 Quail Ridge Dr
Westmont, IL 60559

1. Introductions & Welcome
2. Review Notes from August 14, 2019 Meeting (Exhibit pgs. 2-6)
3. Update on Gathering Information: using user experience methodologies
 - a. Review Journaling Process - topic clusters (Exhibit pgs 7-19)
 - b. Time Study - corrections and ideas for additional targeted studies (Exhibit pgs 20-25)
 - c. Update on Focus Groups - 3 of 4 completed, final group scheduled 9/13 (Exhibit pg 26)
4. Holistic Discussion on Holds
 - a. Review July 24-August 31 data (Exhibit pgs 27-33)
 - b. Identifying issues related to holds
5. Develop assessment tool for outlining issues, responsibilities, corrective action, big plans
6. Clarity Findings Report: outline and assignments
7. Next meeting: Wednesday, October 9 (10-12:30)
<https://www.librarylearning.info/events/?eventID=28767>

Task Force Membership:

- Kerry Halter, Technical Services Manager, Batavia Public Library District
khalter@bataviapubliclibrary.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
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- 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

SWAN Clarity Task Force

Notes

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

Introductions & Welcome

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- 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~~ Acquisitions processing at Messenger relies on pre-processing of material which is configured within separate vendor carts. These carts need to be processed independently, regardless of quantity of items in the order and result in a larger number of separate jobs to be run. The scheduling of jobs is difficult due to other reports within the consortium. This process was a less frustrating experience when processing in the smaller MAGIC consortium where job queue contention was not an issue. 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.

Commented [mk1]: We have a question about this: to clarify, other libraries use invoicing reports, just not other Clarity libraries, right? I'm told INS and GED just ran x12 invoice reports this afternoon.

Commented [DT2R1]: I tried to clarify this better to show the impact related to job queue contention.

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>

Affinity Diagramming: Journaling

September 11, 2019 Clarity Task Force Meeting

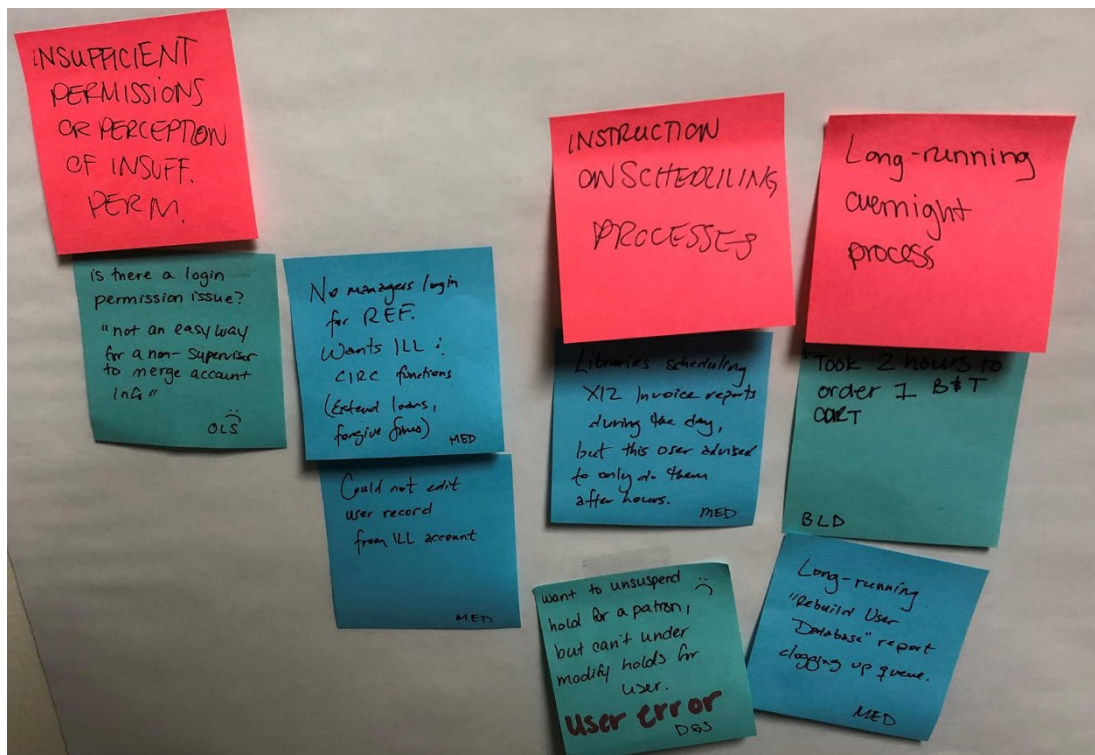
Five SWAN staff (Tara, Crystal, Aaron, Scott, Dawne) participated in an affinity diagramming exercise to summarize the journal entries submitted.

For diagramming we used the following color coding

Blue = WorkFlows

Yellow = Enterprise

Red = Topic clusters



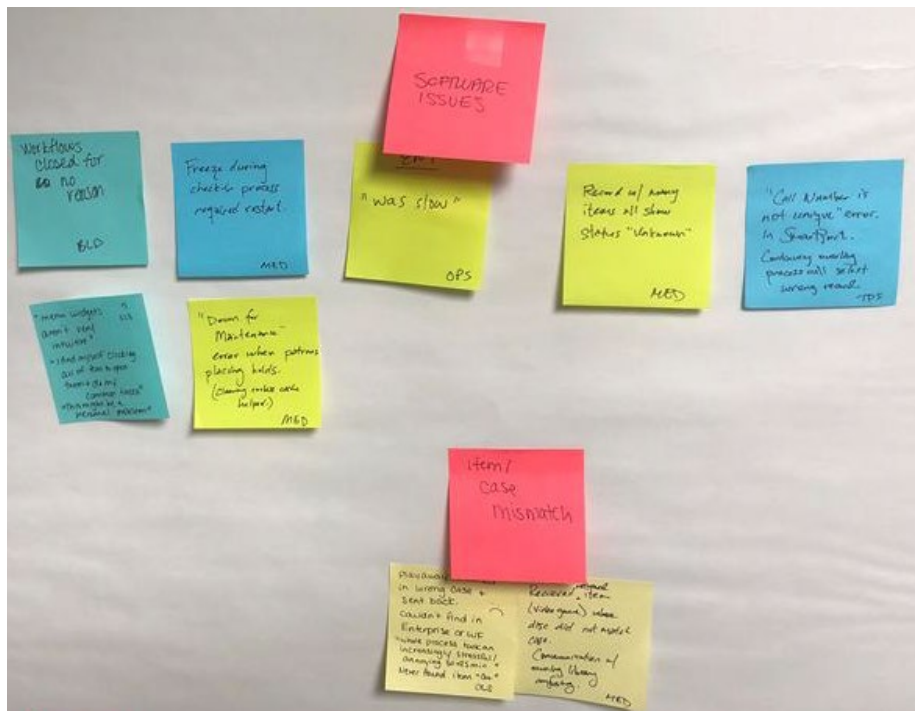
Account Roles & Permissions

- Insufficient permissions
- Login permissions issue
- No manager level login for Ref, need Circ & ILL permissions
- Can't edit user record

Job Scheduling

- Don't know when to schedule jobs
- Some libraries run reports we were told had to run after hours
- Overnight processes run long
- Long-running rebuild user database report clogging up queue
- Took 2 hours to run reports to order one B&T cart

Can't unsuspend hold for patron under Modify holds

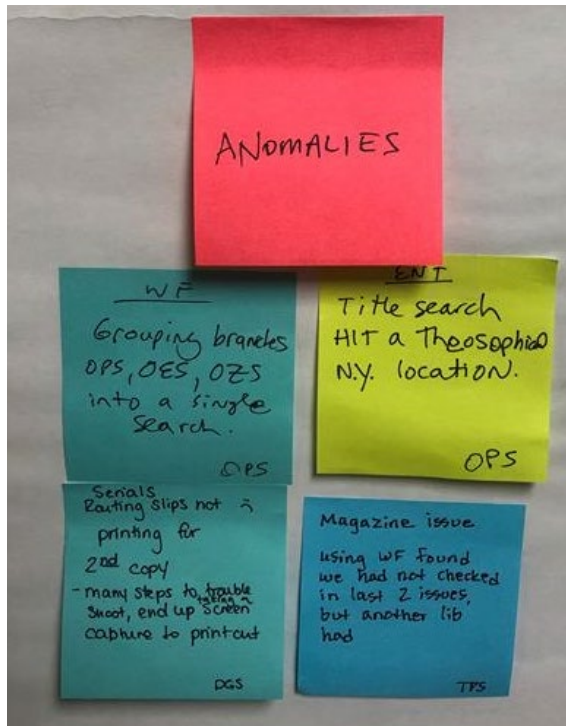


Software Issues

- WorkFlows closed
- Freeze during check-in; had to restart
- Enterprise "Down for maintenance" error when patrons placing holds
- Enterprise slow
- Enterprise – all items show status unknown
- "Call Number is not unique error" in SmartPort

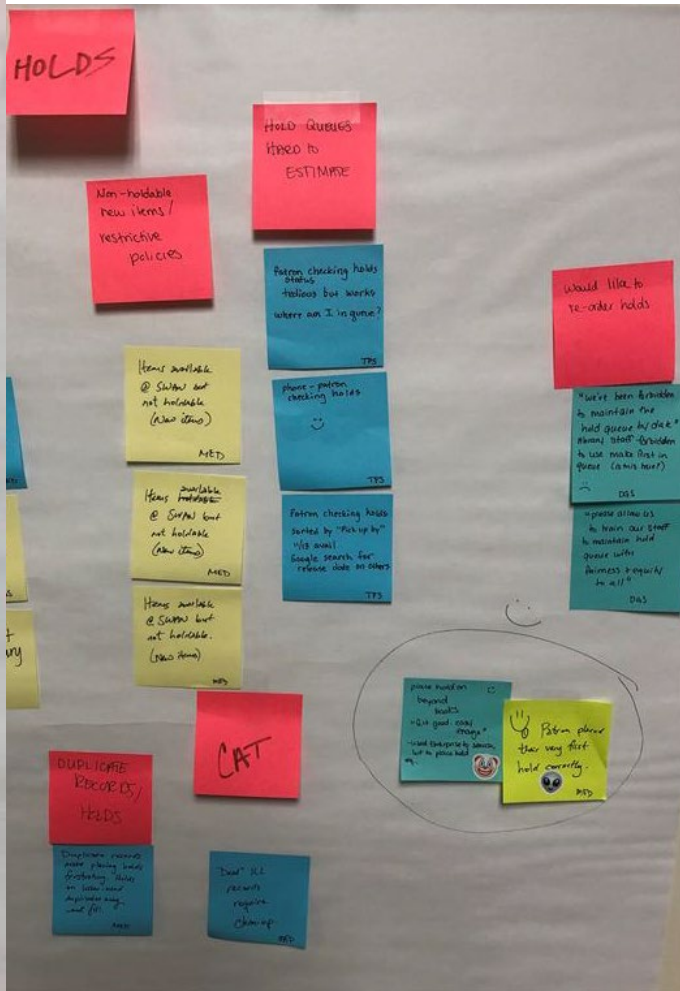
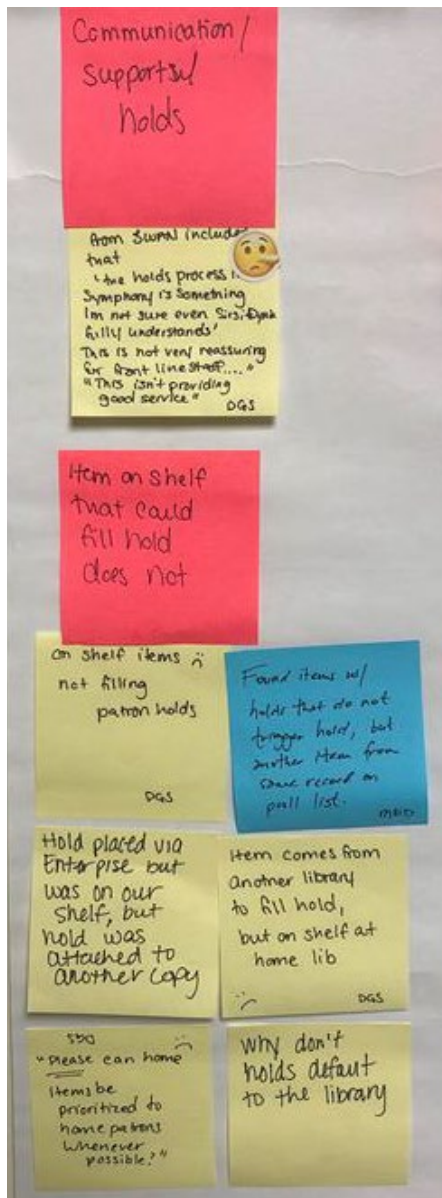
Item/Case Mismatch

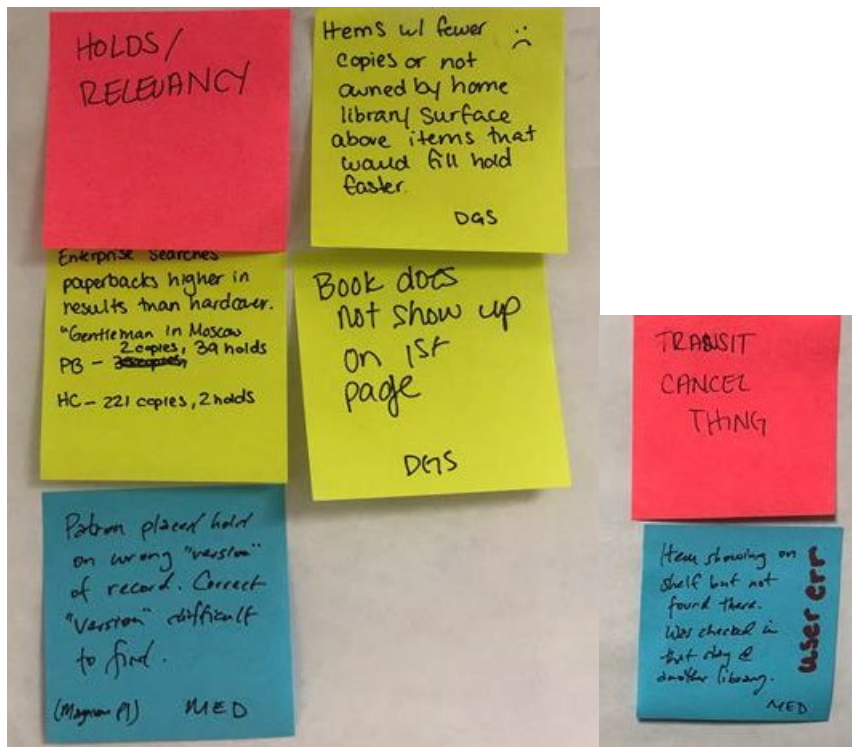
- Item received did not match case
- Playaway in wrong case, send back but could not find in Enterprise



Anomalies

- WorkFlows does not group main and branches into a single search.
- Serials routing slips not printing
- Enterprise – title search found an item with a New York location
- Issues missing - Did not check in last 2 issues of a magazine, another library had





Holds:

Communication/Support

- Do not understand how the system determines how to prioritize and fill holds

Non-Holdable New Items/Restrictive Policies

- (3 entries) Items available at SWAN but not holdable (new)

Hold Queues Hard to Estimate

- (2 entries) patrons wants to know where in queue
- Patron checking on hold queue & release date

Item on shelf that could fill hold does not

- (3) Item comes from another library to fill hold, but copy on shelf
- (2) Why don't holds default to the library
- Found items with holds that do not trigger hold

Cancel Transit Button

- Item shown On Shelf but is not there; was checked in that day at another library

Need to Re-order Hold Queue

- Forbidden from maintaining hold queue
- Please allow us to train staff to maintain hold queue

Relevancy

- Items with fewer copies or not owned by home library surface above items that could fill hold faster

- Book does not show up on 1st page
- Paperback is listed about hard copy and has fewer copies available to fulfill hold requests, patrons pick wrong record
- Placed hold on wrong version, correct version difficult to find

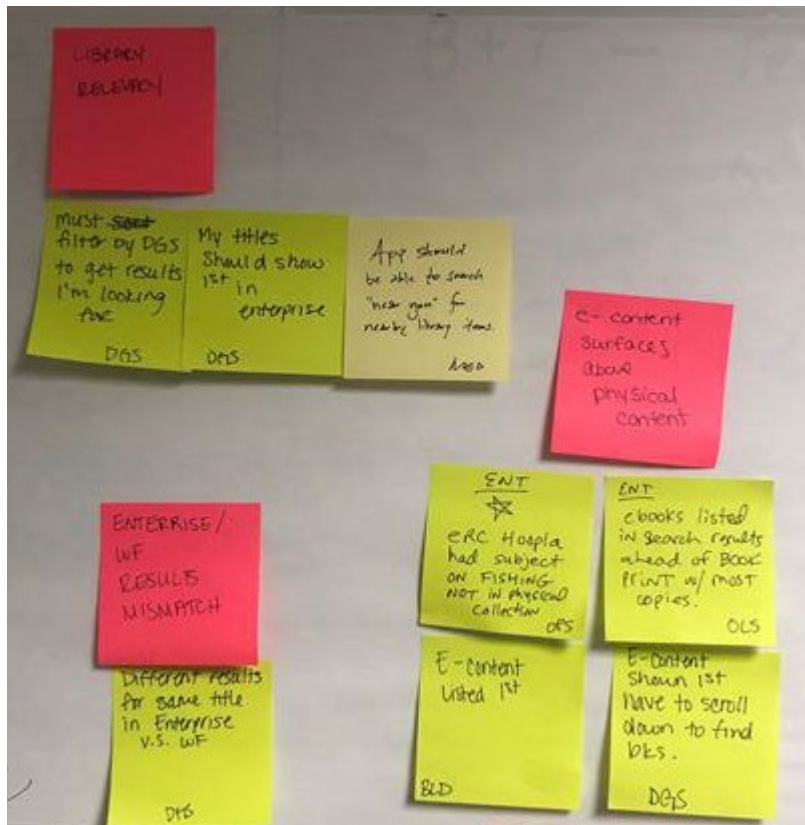
Patron was able to place their very first hold successfully

Cataloging

- Dead ILL records not removed

Duplicate records – Hold on Wrong Record

- Frustrating when hold placed on wrong record



Search Relevancy

Library Relevancy

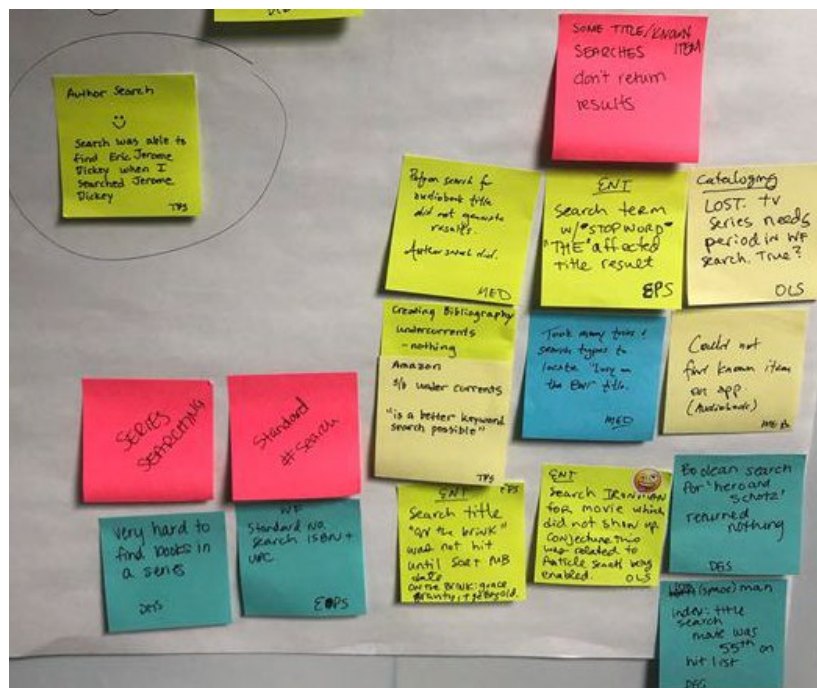
- Have to filter by library to get results looking for
- My titles should show 1st in Enterprise
- App should be able to search “near you” for nearby library items

e-Content Surfaces Above Physical Content

- (3 entries) e-content listed first in Enterprise results
- eRC hoopla had subject on fishing, not in physical collection

Enterprise and WorkFlows Mismatch

- Different results for same title in Enterprise and WorkFlows



Author search returned correct results even with incomplete name

Some Title/Known Item Searches

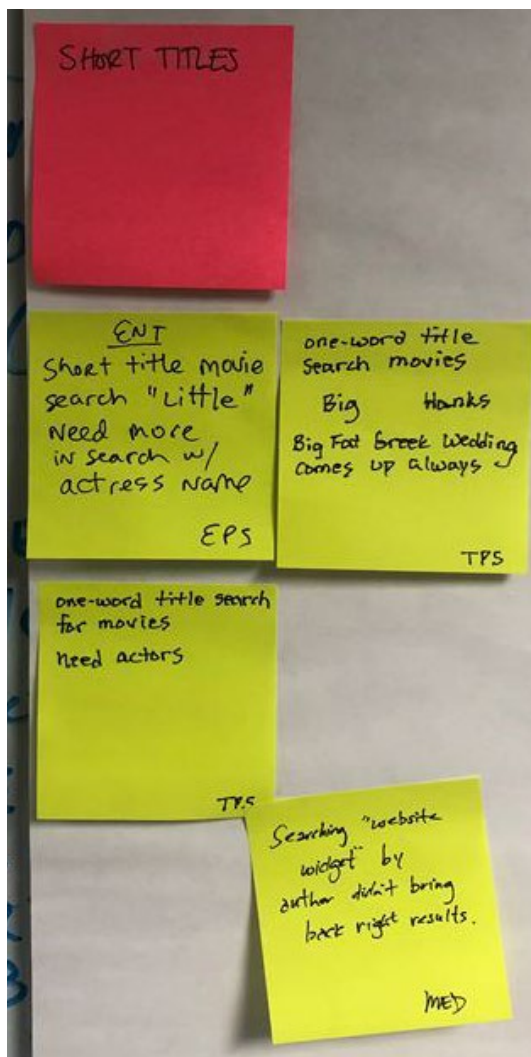
- Patron search for audiobook title did not return results. Search for author did.
- Search term with stop word “the” affected results
- Lost. TV series in WorkFlows search requires period at end
- Could not find known item (audiobook) in app
- Boolean search for “hero and schotz” returned nothing
- Is a better keyword possible?
- (4 entries) for specific titles with unexpected results

Series

- Very hard to find books in a series

Standard Number

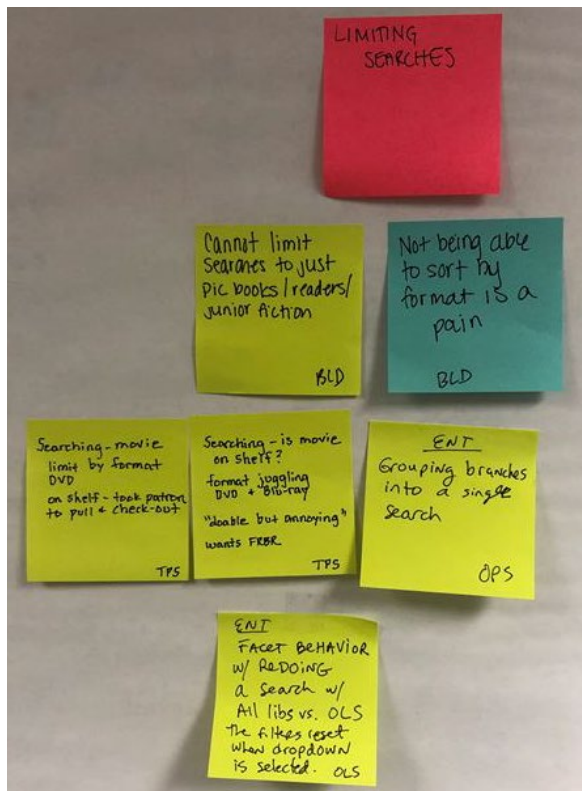
- WorkFlows search on ISBN and UPC worked one day, not the next



Short Titles

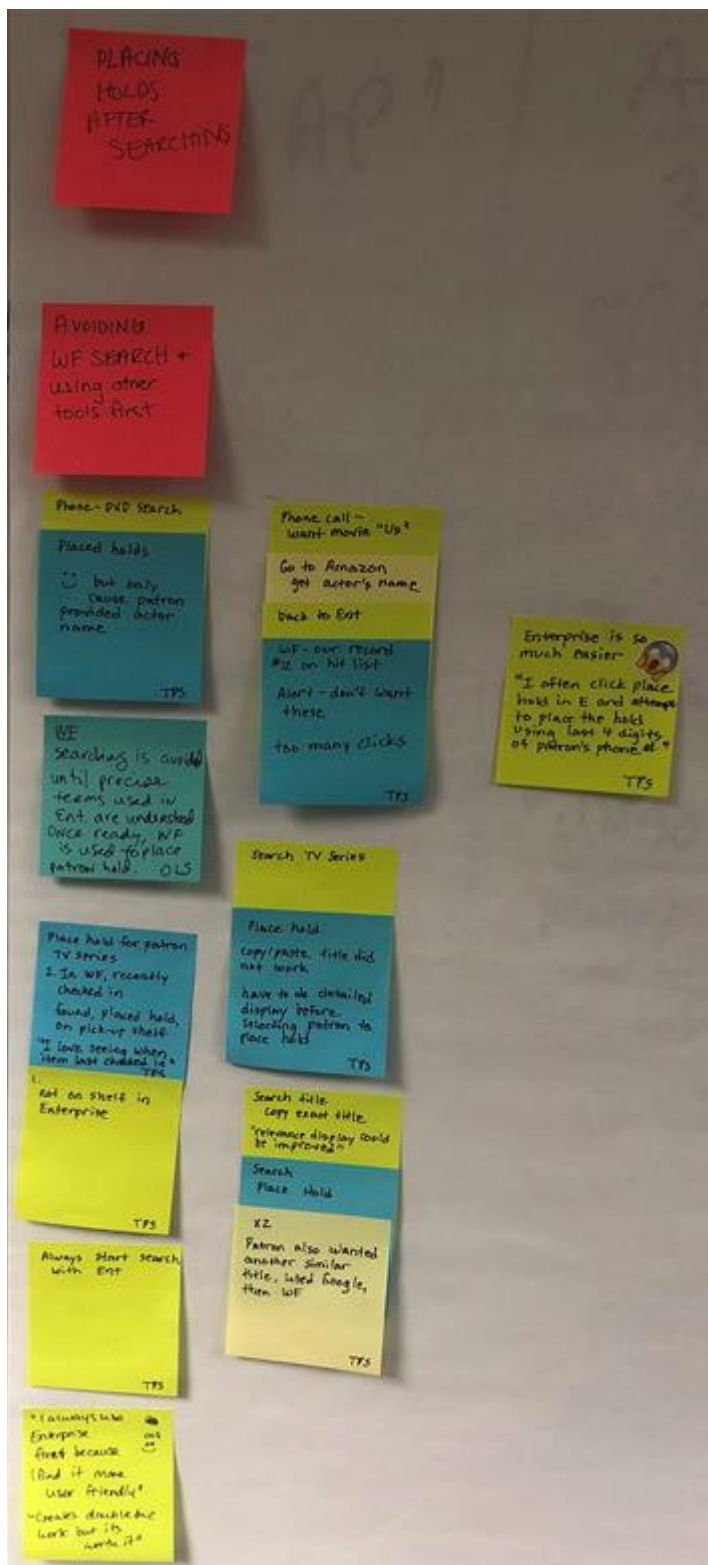
- (3 entries) For one-word movie titles, need actor

Search using website widget for author did not bring back right results



Limiting Searches

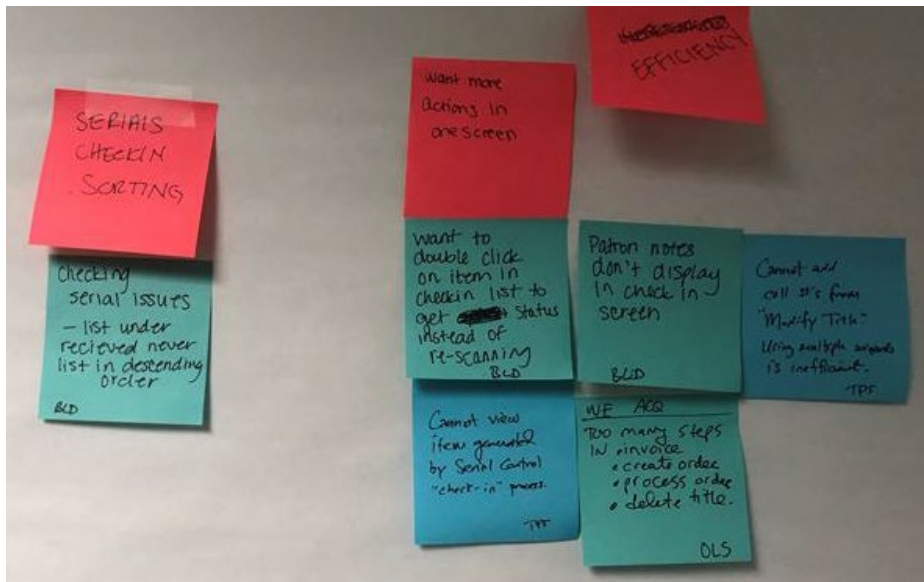
- WorkFlows – not being able to sort by format is a pain
- Want to group branches into a single search
- Cannot limit searches to just picture books/readers/junior fiction
- Searching for dvd vs blu-ray format is “doable but annoying”
- Facet behavior when re-doing a search, filters are lost



Avoiding Enterprise Search and Using Other Tools First

- (8 entries) Assisting patron in locating title to place hold – search in Enterprise, verify in Amazon or Google, then place hold in WorkFlows

- Enterprise is so much easier than WorkFlows – sometimes guess pin and place hold for patron through Enterprise using their barcode/pin



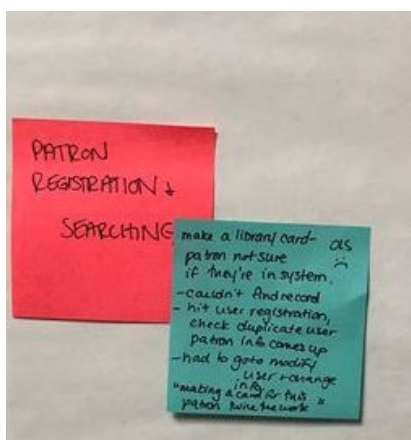
Efficiencies

Want more actions accessible from one screen

- Want to double click on item in checkin to get status instead of re-scanning
- WorkFlows Acq – too many steps to process
- Patron notes don't display in check-in screen
- Cannot add call numbers from "Modify title" screen

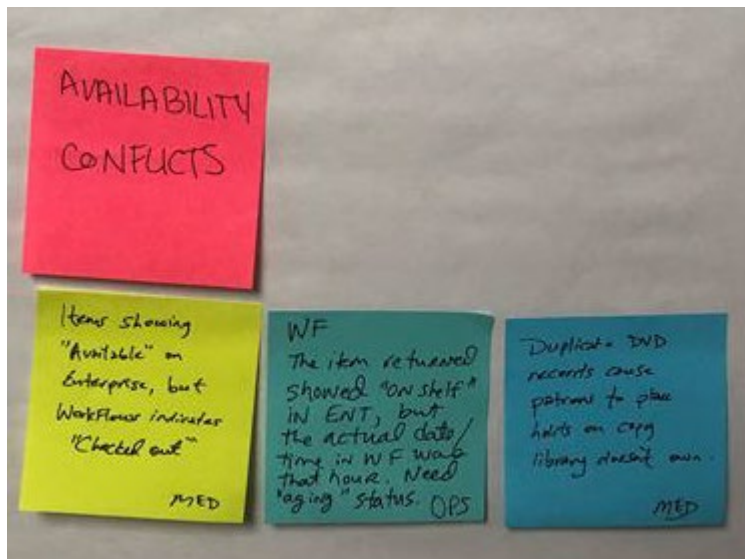
Checkin Serials

- Cannot view item generated by serial control check-in process
- List under received never list in descending order



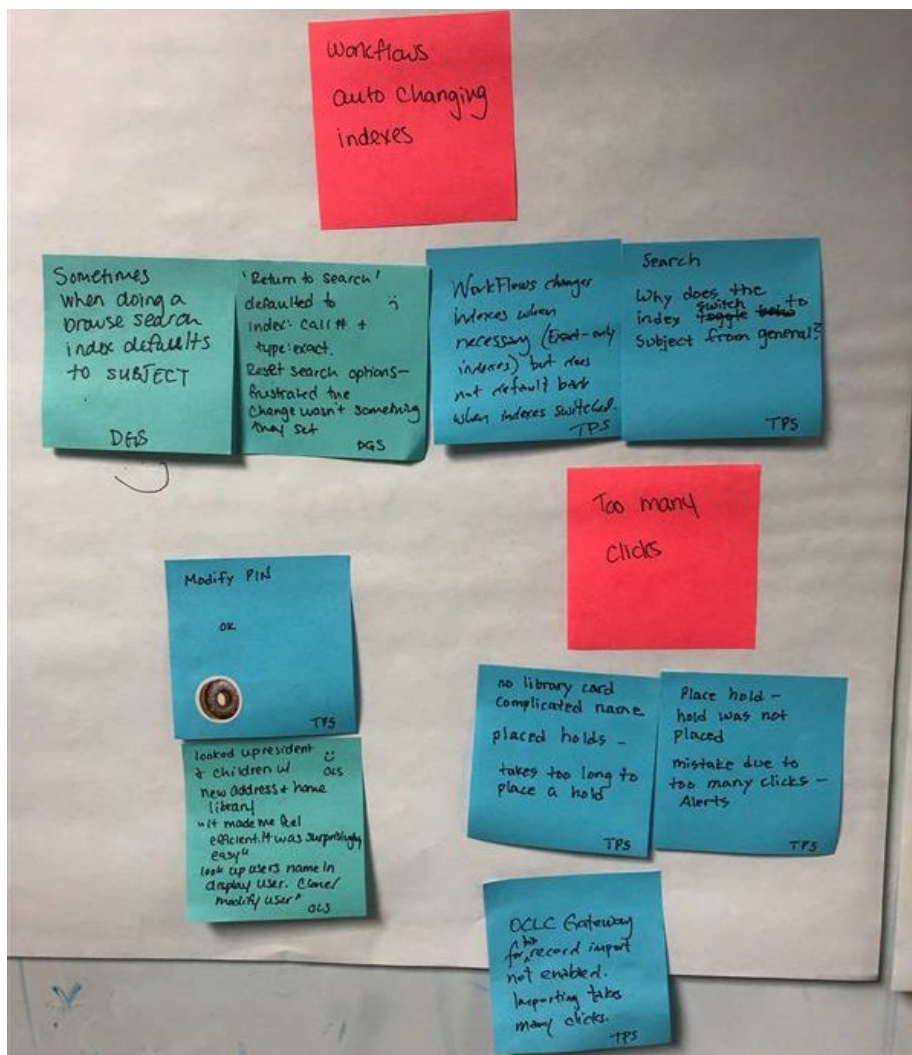
Patron Registration & Searching

- Many steps required to re-register a patron and how to handle previous record
- Updating resident and children with new address – tedious



Availability Conflicts

- Items showing "available" in Enterprise, but in WorkFlows indicate "checked out"
- Item returned showed "on shelf" in Enterprise, but the actual date/time in WorkFlows was that hour. Need "aging" status.



WorkFlows Auto-changing Indexes

- (4 entries) WorkFlows search (browse vs exact) and index default change

Too Many Clicks

- (2 entries) Takes too long to place a hold, leads to mistakes due to so many clicks.
- OCLC Gateway for bib record import not enabled. Importing takes too many clicks.

Preliminary Analysis – Time Studies of Circulation Use of WorkFlows

August 14, 2019

Updated September 8, 2019 (see highlighted text)

Overview

Purpose

This phase of the data collection and analysis requested a series of time studies in WorkFlows, captured at the Circulation desk.

The following instructions were provided to the participants:

This independent capture of WorkFlows activity will allow us to determine exactly what features of the software are most accessed and the efficiency of that work process. It will help identify areas where finding information of completing actions could be improved. It will reinforce potential differences in periods of the day and at libraries, providing a range of activity patterns to observe. We may also uncover areas where additional training or configuration of the interface could be helpful. With time studies, it is helpful to have a specific day/time for capture of screen recordings. This provides an opportunity to see a cross section of activity across multiple libraries within the same period – enabling record of both commonalities and uniqueness.

Timeline for Data Capture

During the week of July 15th, Clarity members were asked to help create screen captures at one Circulation Desk during the following time periods:

- Tuesday, July 16, 10:00 AM – 10:10 AM
- Wednesday, July 17, 12:30 PM – 12:40 PM
- Thursday, July 18, 6:15 PM – 6:25 PM
- Friday, July 19, 3:45 PM – 3:55 PM

Libraries were instructed:

If your library is not open during one of these times, or no activity is recorded, simply indicate that when submitting transmission files. This work is not intended to be exhaustive across all circulation work stations, but rather reflective of a typical use case.

Participation

Six libraries participated in the study for a total of 23 recordings for analysis. The Clarity Task Force members uploaded recordings to a shared personal folder on the team-based SharePoint project site. These recordings were immediately downloaded to a secure internal storage and removed from the team site to protect privacy.

Data was analyzed for functional activity with no recording of specific barcodes, either items or users. Functional processes were codified for consistent reporting and comparison. All data was collected and made anonymous without reference to the specific library. Libraries were codified by random selection of color identifiers.

Findings

Summary of Activity

Data was analyzed from six libraries, representing 23 sessions. The data was analyzed as a composite set and not broken down by library.

Primary functional activities identified included:

- Discharge/Checkin
- Checkout
- User Lookup and Modification
- Onshelf Holds Lookup
- Bill Payment
- Item Search

The following table provides total and average time/activities recorded.

Average Time on Task:

- Active (performing a task) – 3:06 (3 minutes, 6 seconds)
- Idle (screen static at last state) – 6:54 (6 minutes, 54 seconds)
- Approximately 1/3rd of capture time functional operation was in progress

Average number of processes during session (note this is not the number of checkouts or checkins of items, but rather the activation of the functional task and all the associated items involved in that sequential process):

- Average processes per session – 4.3
- Discharge/Checkin – 1.35 (31%)
- Checkouts – 1.17 (27%)
- User lookup/modification – 1.17 (27%)
- Ohshelf holds lookup – 0.35 (8%)
- Item Search and Display – 0.13 (3%)
- Bill payment – 0.09 (2%)

While we did not analyze each task sequence separately, we did capture the time from start of Checkout transaction until completion. This correlates to a patron interaction where efficiency of the application software is critical.

- Number of Checkout transactions (represents number of patrons helped) – 28
- Average of all checkout transaction sequence per patron – 39 seconds
- Average per patron (no alerts) – 17 seconds
- Average per patron (alert – delinquent) – 49 seconds
- Average per patron (alert – holds available) – 59 seconds
- Average per patron (Chicago PL patron) – 84 seconds

Our sample showed that the checkout process is efficient, and patrons on average are helped from start to finish in less than 40 seconds. If no alerts are issued, that time to complete falls to under 20 seconds.

The only checkout that took more than 1 minute was for an external reciprocal borrower where additional verification of patron record and potential lookup at the patron's home library is required.

Process Evaluation

This process of data analysis proved to be effective in showing interaction with a critical application within the SWAN Library Services Platform. As hoped, we were able to determine time-on-task for specific functional tasks that are part of a common circulation desk activity.

Participants indicated that data collection was not a difficult or time-consuming process and use of the recorded selected, activated via the Chrome web browser, did not present installation issues.

For 10 minutes of recorded activity, it takes approximately 20-30 minutes to codify the activity. More active sessions obviously take longer. This process did enable us to create a coding system that can be replicated and expanded for future analysis.

Codified Data Analysis

To understand the process of data collection, the following sample represents how information was codified and analyzed in the recordings. Start time of each transaction was logged. Time on task was calculated (Time of last step in transaction – Time of first step in transaction).

Time	Menu			Total Time in Tasks	Idle
				2:26	7:34
2:16	Circulation >Charge/Checkout			0:28	
2:18		scan user barcode			
2:20		alert - holds available > OK	shows inactive ID in alert		
2:39		scan item barcode			
2:44		close			
5:22	Circulation >Charge/Checkout			0:37	
5:23		scan user barcode			
5:37		scan item barcode			
5:44		scan item barcode			
5:49		scan item barcode			
5:55		email current chekcouts receipt			
5:59		close			
10:35	Circulation >Charge/Checkout			0:23	
10:38		scan user barcode			
10:39		alert - user deliquent	shows amount owed and notes (DL# NEEDS INPUTTING IN RECORD.		
10:44		check out to user			
10:50		scan item barcode			
10:58		close			
11:02	User > Modify User			0:58	
11:03		click on current patron			
11:05		Basic Info			

Observations

When extending this exercise in the future, a participation statement should be signed which indicates understanding of the process and purpose of the activity logging. Some activity logged in the sample did not appear linked to actual service-related activities (e.g. checking in items that were not checked out). Without detailed investigation it would be difficult to identify the purpose of these activities. They were included in this observational study.

The following observations were noted which may highlight a need for more standardized procedures across the SWAN membership, additional training, and sharing of common practice amongst members.

- One library updates patron record with driver's license number. This is scanned and used as an alternate id. What security concerns does this raise collecting this information in the SWAN database?
- Observed delays between scanning and barcode and entry of that barcode point to difference settings in barcode scanners – some send an automated carriage return, others not. While this is a library choice and can be set based on library preference, have we properly compared/contrasted difference for the membership to evaluate the appropriate settings for their library?
- Popup alert screens related to transits/holds on the Discharge/Checkin screen appear disabled for all sample libraries. SWAN trains people to “read all the screens” — but if a screen is not displayed, how are staff determining where/how to route items? Could this lack of Route To screen be related to Missing In Transit items? Additional testing with the recording tool showed WorkFlows pop-up alerts displayed during recording with the exception of the popup alerts related to item routing for holds. While these screens did not display in the recording, they are displayed for all libraries in actual use.
- Many checkins were for items already checked in. Are libraries doing a double check-in before shelving? Perhaps items are re-scanned before final reshelving in the service area.
- When re-registering a patron from another library, any additional features activated by their home library (e.g. Outreach, User Groups) is automatically turned on for their record, even if the new library does not use those features of the software.
- Alerts related to delinquency and Inactive IDs are prevalent. Is there a more efficient workflow than displaying alerts in these situations?
- Data clean-up (e.g. changing name/address information to all caps) may be more efficiently done through centralized scripts.

Conclusion

The data gathering was a straight-forward and easily replicable activity. While data analysis can take some time, targeted key functional analysis can provide much insight.

This data collection method should be examined in other targeted work processes including cataloging and placement of holds.

Activity Log by Library

Identity Code	Session	Active			Functional Task					
		Minutes	Idle	Processes	Checkout	User	Checkin	Pay bills	Item search	Onshelf Holds
blue	1	48	552	4		1	2			1
blue	2	217	383	7	3	2	2			
blue	3	189	411	6	1	4	1			
blue	4	59	541	2		1	1			
green	1	267	333	7	1	4	1	1		
green	2	354	246	5	1	2	2	0		
green	3	126	474	4	1	2		1		
orange	1	352	248	4	1		3			
orange	2	409	191	5	2		3			
orange	3	456	144	6	3		3			
orange	4	81	519	2	1		1			
purple	1	146	454	4	3	1				
purple	2	104	496	2	1		1			
purple	3	62	538	2	1				1	
purple	4	40	560	2	2					
red	1	43	557	3	1		2			
red	2	225	375	6	3	1	2			
red	3	139	461	3		3				
red	4	97	503	2			1		1	
yellow	1	270	330	4			2			2
yellow	2	144	456	10	1	3	2			3
yellow	3	263	337	7	1	3	1		1	1
yellow	4	181	419	2			1			1
		4272	9528	99	27	27	31	2	3	8
Average		185.74	414.26	4.30	1.17	1.17	1.35	0.09	0.13	0.35
		3:06	6:54							

Calculation of Checkouts

Checkouts				
	Seconds	RBP	Deliquent	holds
	84	x		
	76		x	
	41		x	
	41		x	
	69		x	
	17		x	
	56			x
	104			x
	53			x
	54			x
	28			x
	28			
	37			
	23			
	28			
	13			
	26			
	20			
	27			
	16			
	26			
	70			
	60			
	17			
	23			
	33			
	22			
	1092			
Avg All	39			
Avg exceptions	16.75	84	48.8	59

SWAN Members Focus Group Update

Four focus groups were scheduled in August-September, 2019 to gather member input. Each focus group allowed up to 10 participants per focus group, with priority given to registrants from different libraries. None of the 4 focus groups had waiting lists. SWAN sent out 2 SWANcom announcements, news posts, and promoted these focus groups at meetings and in the SWAN newsletter.

Locations were selected to support attendance across the membership.

- Batavia Public Library – August 21
 - Observer: Kerry Halter
 - Attendees: 5
 - Libraries represented: 5 (4 who joined SWAN in 2018)
- Tinley Park Public Library – August 23
 - Observer: Kristina Howard
 - Attendees: 8 registered, 7 attended
 - Libraries represented: 7
- SWAN Headquarters – September 10
 - Registrants: 8 registered
 - Libraries represented: 8 (4 who joined SWAN in 2018)
- Oak Park Public Library – September 13
 - Registrants: 10 registered
 - Libraries represented: 9 (2 who joined SWAN in 2018)

Pending completion of the focus groups and assurances that comments would be anonymous, composite research findings will be available at the completion of all groups.

Data Analysis July 24-August 31, 2019

Preliminary Analysis: September 8, 2019

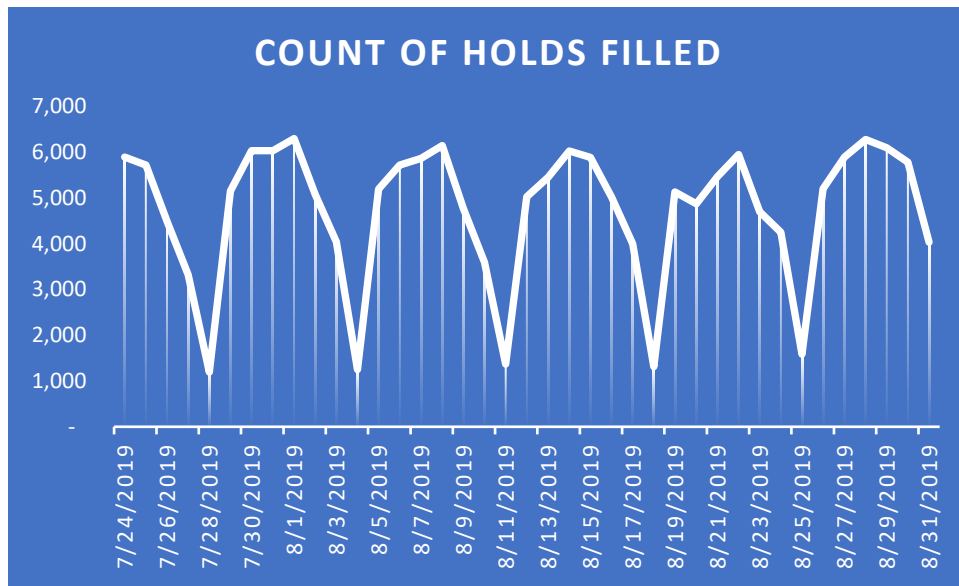
Every hold filled during the period of data collection was logged including title, catalog key, hold placement date, hold filled date. From this data, we determined volume of hold fulfillment and average number of days to fill holds throughout the consortium.

When reviewing configuration changes, we will closely monitor the median days to fill a hold in order to maintain a healthy flow of material through the system.

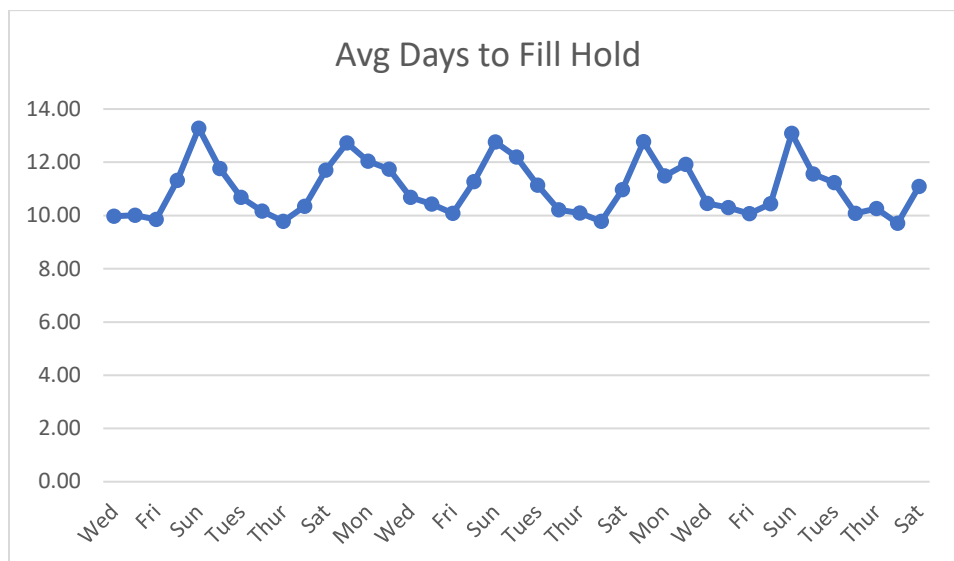
Date	DOW	Count	Total Days	Avg Days	Median	Same Day	1-3 Days	4-7 Days	8-14 Days	15-31 Days	>31 Days
7/24/2019	Wed	5,895	58,801	9.97	6	147	1084	2993	967	357	347
7/25/2019	Thur	5,723	57,311	10.01	6	172	1507	2346	1011	335	352
7/26/2019	Fri	4,490	44,248	9.85	6	74	1100	1904	854	271	287
7/27/2019	Sat	3,320	37,589	11.32	7	55	471	1509	822	229	234
7/28/2019	Sun	1,194	15,862	13.28	7	15	150	448	366	107	108
7/29/2019	Mon	5,156	60,640	11.76	7	145	397	2576	1313	396	329
7/30/2019	Tues	6,033	64,472	10.69	6	139	628	3205	1315	370	376
7/31/2019	Wed	6,032	61,287	10.16	6	133	1147	2768	1227	401	356
8/1/2019	Thur	6,299	61,616	9.78	6	126	1616	2549	1268	380	360
8/2/2019	Fri	5,073	52,462	10.34	5	77	1231	2063	1055	325	322
8/3/2019	Sat	4,041	47,319	11.71	6	69	524	1950	904	301	293
8/4/2019	Sun	1,250	15,909	12.73	7	19	126	502	392	106	105
8/5/2019	Mon	5,193	62,525	12.04	7	200	339	2557	1333	394	370
8/6/2019	Tues	5,723	67,210	11.74	6	150	614	2941	1207	381	430
8/7/2019	Wed	5,868	62,658	10.68	6	150	1068	2855	1046	374	375
8/8/2019	Thur	6,147	64,100	10.43	6	128	1505	2600	1118	403	393
8/9/2019	Fri	4,770	48,071	10.08	5	79	1264	1890	934	320	283
8/10/2019	Sat	3,595	40,505	11.27	6	55	456	1786	812	219	267
8/11/2019	Sun	1,368	17,459	12.76	7	33	145	602	356	108	124
8/12/2019	Mon	5,029	61,322	12.19	7	194	360	2597	1114	398	366

8/13/2019	Tues	5,457	60,819	11.15	6	147	718	2730	1114	376	372
8/14/2019	Wed	6,025	61,566	10.22	6	158	1176	2917	998	416	360
8/15/2019	Thur	5,889	59,476	10.10	6	137	1486	2627	920	351	368
8/16/2019	Fri	5,020	49,113	9.78	5	128	1305	2163	788	326	310
8/17/2019	Sat	3,997	43,860	10.97	6	75	513	1916	931	290	272
8/18/2019	Sun	1,312	16,766	12.78	7	28	131	544	388	111	110
8/19/2019	Mon	5,134	58,996	11.49	6	122	420	2732	1144	341	375
8/20/2019	Tues	4,870	58,028	11.92	6	116	640	2360	1007	367	380
8/21/2019	Wed	5,465	57,126	10.45	6	163	980	2723	906	319	374
8/22/2019	Thur	5,951	61,284	10.30	6	93	1489	2590	1044	341	394
8/23/2019	Fri	4,696	47,270	10.07	5	71	1188	1952	868	310	307
8/24/2019	Sat	4,250	44,355	10.44	6	51	508	2187	975	260	269
8/25/2019	Sun	1,588	20,788	13.09	7	44	140	679	463	128	134
8/26/2019	Mon	5,201	60,119	11.56	7	178	373	2647	1276	375	352
8/27/2019	Tues	5,895	66,224	11.23	6	129	662	2951	1352	402	399
8/28/2019	Wed	6,277	63,316	10.09	6	203	1231	3044	1017	391	391
8/29/2019	Thur	6,094	62,531	10.26	6	151	1550	2581	1070	365	377
8/30/2019	Fri	5,783	56,132	9.71	5	102	1457	2472	1044	359	349
8/31/2019	Sat	4,034	44,728	11.09	6	67	582	1901	901	297	286
		Avg Daily Holds Filled	Average Total Days to Fill	Avg Days to Fill per Hold	Median Days to Fill	Same Day	1-3 Days	4-7 Days	8-14 Days	15-31 Days	>31 Days
		4,747	51,125	11.01	6	4323	32281	86357	37620	12300	12256
						2.34%	17.44%	46.64%	20.32%	6.64%	6.62%

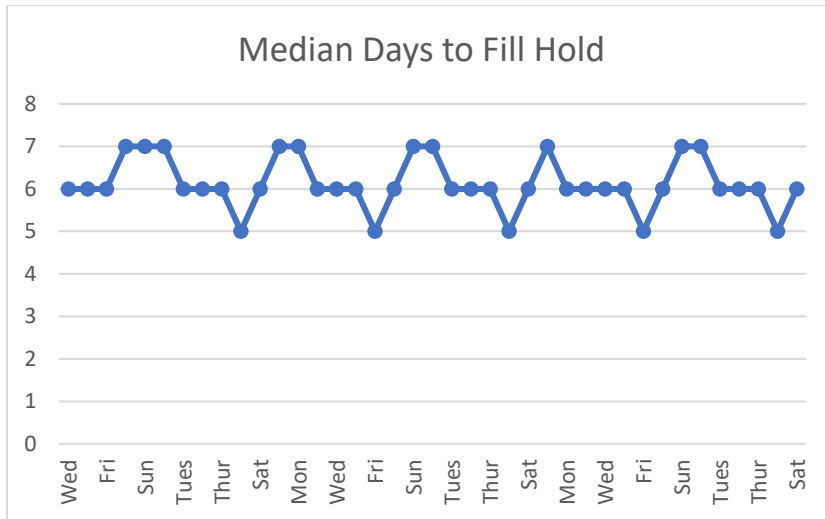
The following charts provide an overview of how many holds are filled and the pattern of activity through the consortium. As expected, fewer holds are filled on the weekend.



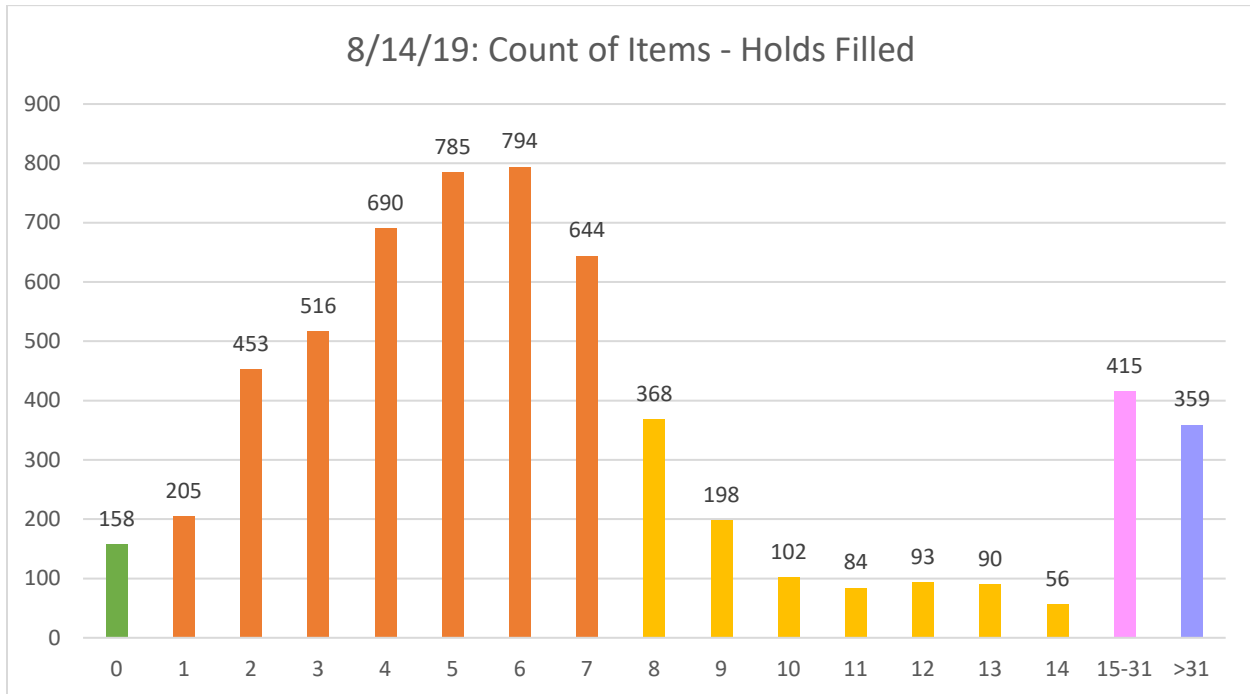
While fewer holds are filled on the weekend, the average days to fill increases on the weekends.



The most consistent metric is median days to fill a hold. As we tune hold configuration, it is important to maintain this “healthy heartbeat.” Any increase in median days to fill a hold indicates an adverse change.



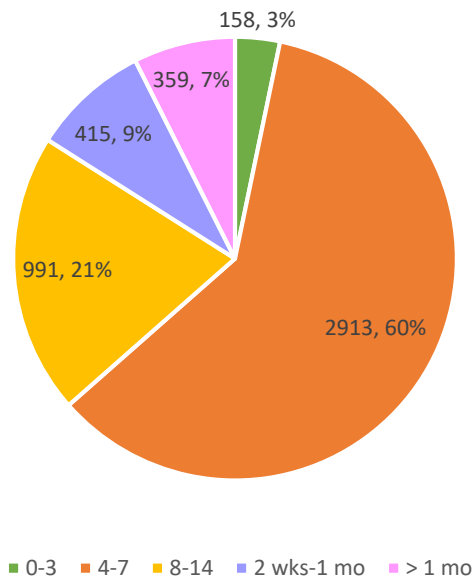
Using a sample day, we were able to determine typical time required to fill holds.



Breaking this down into segments (0-3 days, 4-7 days, 1-2 wks, 2 wks-1 month, > a month) shows:

- 63% of holds are filled within 1 week
- 84% of holds are filled within 2 weeks
- 93% within one month
- 7% over one month

8/14/19: Count of Items - Holds Filled

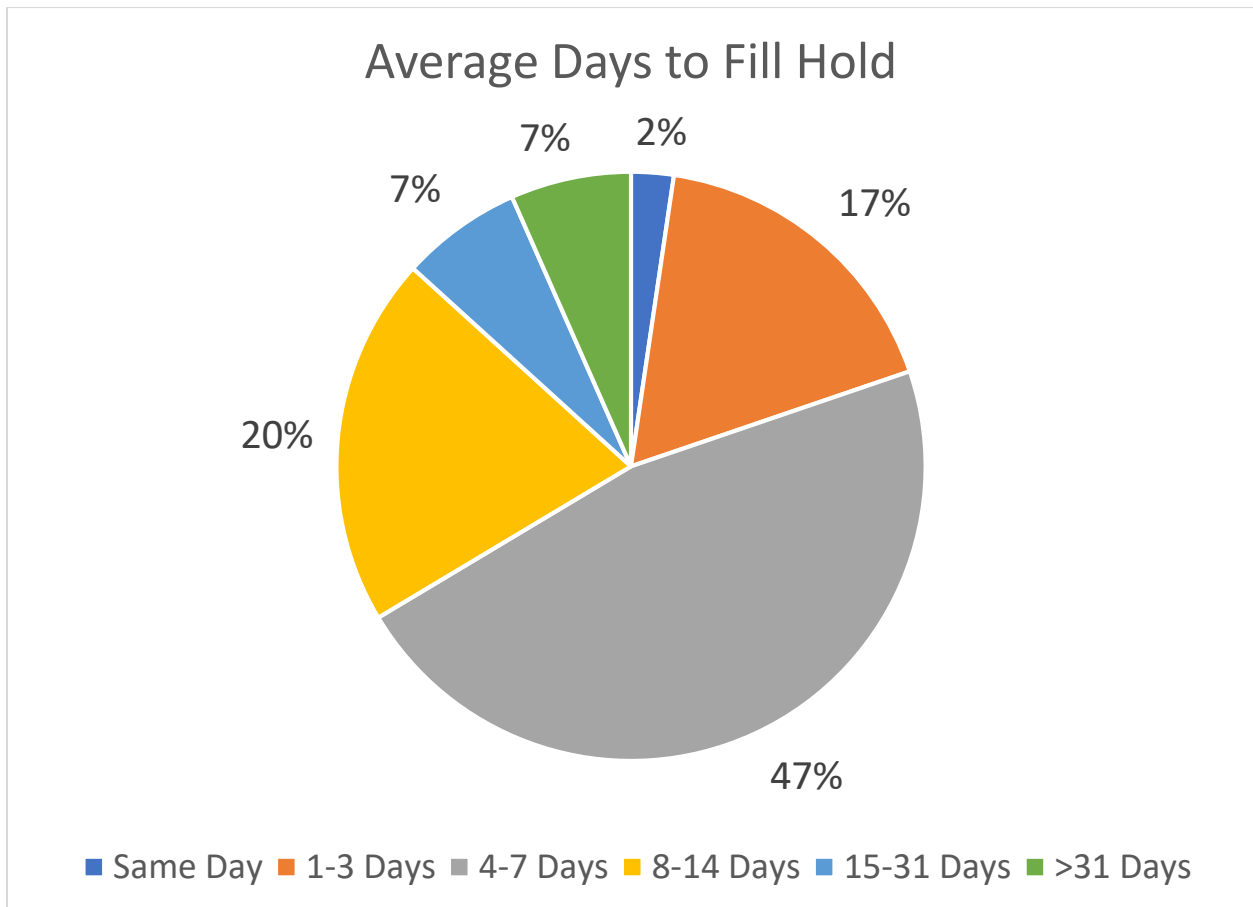


By using “one day in time” to evaluate hold fulfillment performance, further investigation by title showed these longer holds were identified with:

- Holds placed early (on order) before the item was available to circulate
- Holds that were suspended for a period of time (e.g. book clubs)

Across the full time period, these trends were consistent.

- 66% of holds are filled within 1 week
- 86% of holds are filled within 2 weeks
- 93% within one month
- 7% over one month



Average Days to Fill Hold - July 24-August 31, 2019

