SWAN Fireside Chat

May 12, 2020

Topics

- Action Recap: Due Date Extension
- Illinois Governor’s Plan
- Curbside Plans
  - Curbside Communicator
- Planned Reopening (Reminders/review/update)
  - Taking care of items currently on hold shelf
  - Survey for Curbside/Fine Free options
  - Staff Preparedness Training
  - Sourcing PPE & Supplies
- Staff returning to the building – processing items
- SWAN eXpo 2020 Web Series
Action Recap

- [NEW] Request webform for extending Due Dates
- [NEW] Some libraries open for Curbside
  - Days Closed Updated (“open”)
  - Hold unsuspended
- Local Holds Only
- Holds suspended until June 8, 2020 (unless offering curbside)
- Due Dates extended to at least 6/3/2020 (Public Libraries)
  - Library specific requests processed
- Patron record expiration dates updated to 7/4/2020 (for any user accounts expiring between 1/1/2020-6/30/2020)
- Notices, billing, collection – all suspended
- Holds with an expiration date of March 16 – September 6, updated to September 7, 2020.

Restore Illinois: A Public Health Approach to Safely Reopen Our State

<table>
<thead>
<tr>
<th>Phase 1</th>
<th>Phase 2</th>
<th>Phase 3</th>
<th>Phase 4</th>
<th>Phase 5</th>
</tr>
</thead>
<tbody>
<tr>
<td>Rapid Spread</td>
<td>Flattening</td>
<td>Recovery</td>
<td>Revitalization</td>
<td>Illinois Restored</td>
</tr>
<tr>
<td>Strict stay at home and social distancing guidelines are put in place, and only essential businesses remain open. Every region has experienced this phase once already and could return to it if mitigation efforts are unsuccessful.</td>
<td>Non-essential retail stores reopen for curb-side pickup and delivery. Illinoisans are directed to wear a face covering when outside the home and can begin enjoying additional outdoor activities like golf, boating &amp; fishing while practicing social distancing.</td>
<td>Manufacturing, office, retail, barbershops and salons can reopen to the public with capacity and other limits and safety precautions. Gatherings of 10 people or fewer are allowed. Face coverings and social distancing are the norm.</td>
<td>Gatherings of 50 people or fewer are allowed, restaurants and bars reopen, travel resumes, child care and schools reopen under guidance from the Illinois Dept of Public Health. Face coverings and social distancing are the norm.</td>
<td>The economy fully reopens with safety precautions continuing. Conventions, festivals and large events are permitted, and all businesses, schools and places of recreation can open with new safety guidance and procedures.</td>
</tr>
</tbody>
</table>
## Phase 1: SWAN Reopening Plan
- Library Facilities Closed to the Public
- ILL delivery between libraries suspended
- Library facilities closed, virtual services
- Days Closed set for libraries
- Patrons can place requests but are suspended via automated script
- Patron notifications and billing via email, text, telephony, and print remain suspended
- Due dates are extended to a single fixed date for all closed libraries
- Card expirations are extended to a single fixed date
- OCLC set as non-supplier
- Patrons with a status of either delinquent or blocked who owe less than $100 have their status changed to OK through a nightly scripted task

## Phase 2: SWAN Reopening Plan
- Library Facilities Open for Limited Staff-Provided Services
- ILL delivery between libraries suspended
- Library facility provides curbside, home delivery, open limited hours, PPE supplied to staff, virtual services
- Days Closed updated to limited days libraries open
- Patrons can place requests but only on local library material; requests denied on other library collections
- Same as phase 1
- Due dates are extended per library based on reopening plan
- Same as phase 1
- Same as phase 1
- Same as phase 1

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**Sharing Library Plans**

- [https://forums.swanlibraries.net/t/reopening-considerations/397/28](https://forums.swanlibraries.net/t/reopening-considerations/397/28)
- [https://support.swanlibraries.net/documentation/71031](https://support.swanlibraries.net/documentation/71031)
Curbside

- Curbside Communicator
- Resources from BIS, EVS

Evergreen Park and Blue Island were the first SWAN libraries to offer curbside service, starting Monday, May 11th. Evergreen Park’s superhero library staff created a video that is fun and informative. Thanks for sharing!

Below the video files can be downloaded from Blue Island and Evergreen Park providing communication examples when developing curbside delivery.

- Blue Island - Contact-Free Curbside Pickup Service [pdf]
- Evergreen Park - Curbside Delivery Bag Tag [pdf]
Curbside Communicator – Staff Interface

Curbside Cannon
When a Curbside Communicator just isn’t enough
Curbside (as of 5/4)

Will your library be offering curbside?
Yes, 11
No, 2

Anticipated starting dated for curbside?
May 5
May 12
May 19
May 26
June 2
June 9
June 16

Curbside (as of 5/11)

Will your library be offering curbside?
Yes, 20
No, 1

Anticipated starting dated for curbside?
May 5
May 12
May 19
May 26
June 2
June 9
June 16
June 23
June 30
Fine Free for Now

Would you like to implement Fine Free for Now settings?

<table>
<thead>
<tr>
<th></th>
<th>Yes: Fine Free for Now - 0</th>
<th>Yes: Fine Free for Now - 2</th>
<th>No: We are already Fine Free</th>
<th>No: We do not wish to implement</th>
</tr>
</thead>
<tbody>
<tr>
<td>Number of responses</td>
<td>5</td>
<td>14</td>
<td>4</td>
<td>4</td>
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</table>

Want more details on how it works?

https://support.swanlibraries.net/documentation/70788

During these times of uncertainty, libraries are looking for ways to provide service to patrons without causing financial distress. Closely mirroring SWAN’s Fine Free strategy, Fine Free for Now would assist libraries in going fine free during their staged opening process.

Of utmost concern is limiting handling of cash and credit cards by your staff during this time. Fine Free for Now eliminates most of these transactions from occurring, keeping patrons and staff safer.

Staff Preparedness Training

https://support.swanlibraries.net/documentation/71853

Three courses developed and available:
1. Preparing for Reopening
2. Material Quarantine
3. Curbside Pickup

Approximately 20 minutes total to complete all tutorials.
SWAN PPE Curbside

• Using SWAN as bulk-purchaser
• PPE ordered for SWAN library purchase
  • Liquid surface sanitizer
  • Hand gel
  • Masks
  • Gloves
  • Face shields
• Announcement next week!

Staff return – processing items

1. Check in items in bins that were delivered after you closed (holds are still suspended, nothing will trap)
   • Your items will route to be re-shelved
   • Other library’s items will route to transit to the home library
     • Sort and box or place separately on shelves or tables for each individual library. Some libraries are arranging “drop and swap” curbside with neighboring libraries because only local items will fill holds

2. Process the items currently on your hold shelf for each patron - these items will be your “test run” for curbside
   • Contact the patron to see if they still want the items
     • If they still want the items
       • Check the items out to the patron
       • Bag the items
       • Staple the paper receipt to the bag
       • Arrange a date/time for the patron to pick them up
       • Set aside for pickup
     • If they no longer want the items
       • Check them in

3. Once your book-drops are open
   • Take the items directly to your designated quarantine area and mark them with the “all clear” date
   • Once you have items that are cleared to be checked in use the steps above

4. Onshelf Items with Holds will be populated the day before you chose to begin your curbside pickup.
   • Patron name and barcode have been added to the list.
   • Sort by patron before printing the list
   • Pull items from the shelves and keep them sorted by patron
   • Check the item(s) out to the first patron
   • Click the Email Current Checkout Receipt button (we have added wording to the receipt instructing the patron to contact the library to arrange a pickup date/time
     • If there is no email address in the patron’s record you will need to call them to let them know the items are checked out and arrange a pickup date/time
   • Place the items in a bag and staple the paper receipt to the bag
   • Place the bag in your library’s designated pickup area
### Staff Return – Processing Items

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<table>
<thead>
<tr>
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</thead>
<tbody>
<tr>
<td><strong>1. Bins</strong></td>
<td>Bins delivered prior to close</td>
</tr>
<tr>
<td><strong>2. March Hold Shelf</strong></td>
<td>Items that remain on hold shelf prior to close</td>
</tr>
<tr>
<td><strong>3. Book Drop</strong></td>
<td>Resume book drop processing</td>
</tr>
<tr>
<td><strong>4. Curbside Processing</strong></td>
<td>New process for Onshelf Item (cowboy hat)</td>
</tr>
</tbody>
</table>

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1. Bins delivered, not yet processed (while holds still suspended)

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<thead>
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</thead>
<tbody>
<tr>
<td><strong>Material “Clean”</strong></td>
<td>Items that have been sitting in bins have satisfied quarantine – process</td>
</tr>
<tr>
<td><strong>Check In Items</strong></td>
<td>Your items will route to be re-shelve</td>
</tr>
<tr>
<td><strong>“Route” to home library</strong></td>
<td>Items that are not your items, will route to transit</td>
</tr>
</tbody>
</table>
  *Sort and box or bag separately on shelf or tables for each individual library*  
  *Pending resumption of delivery, some libraries may arrange “drop and swap” curbside with neighbors*  
  *Consider drop-off to book drops that are open* |

20
2. Process items currently on hold shelf (“test run” for curbside)

- **Start with March shelf**
  - Do not print your pull list and process new holds until you finish clearing the March hold shelf completely

- **Assess**
  - Assess current hold shelf (do NOT checkin items)
    - Limit the number of staff handling material, split up the material by patron

- **Contact**
  - Contact patron to see if they still want the items
    - If yes, checkout to patron and schedule curbside
    - Follow curbside processing
    - If no, check in the item

3. Resume book drop processing

- **Empty**
  - Take items directly to quarantine space

- **Label & Track**
  - Clearly organize and label with “all clear” date

- **Check In**
  - Check In items after “all clear” date – remember Quarantine Date Math from staff training
4. Reopening (Curbside, home delivery)

Onshelf Items
- Populated when holds are unsuspended and Days Closed updated.
  - Will populate local holds (your items, your patrons) only.

Divide & Conquer
- Sort OnShelf Item list by patron last name before printing
  - Assign to staff specific patrons
  - Pull items from shelf, keep sorted by patron
  - Check out items by patron

Contact Patron
- Use “Email Current Checkout Receipt” (SMS or phone)
  - Wording added to receipt instructing patron to contact library for pickup

Package Items
- Bag and segregate for pick up
  - Place items in bag & staple receipt to bag
  - Include any library-specific messaging
  - Place in designated area
  - Schedule pick up or monitor arrival with Curbside Communicator

Curbside checkout processing – staff experience

1. Check Onshelf Items List
   Sort by Patron Last Name

2. Pull items from shelves

3. Checkout to Patron
   Email Receipt
   Contact Patron

4. Print receipt
   Staple to bag

5. Move to holding area

6. Order Pick-up
   Items not picked up are checked back in

One person wears all these hats. Minimal handling of items. Split workload by patron last name groupings.
Until delivery resumes

Quarantine material before returning to home library

If desired, use existing means to return items to owning library
- “swap and drop” – curbside
- Return to open book drops

Local holds only processing means items not owned will not fulfill holds until the item returns home.

FYI: 41,837 items are in transit since 2/1/2020

Introducing....
SWAN eXpo 2020 Web Series

Join us under the big tent!

Submit a presentation idea -
SWAN eXpo 2020 Web Series
Cataloging Genealogy Items

The CMC will explain what you may find in genealogical materials your library receives from local genealogists and will discuss what information should be in the bibliographic record to provide viable searching to the patron by taking a minimal genealogy record and enhancing it for searching, while also following RDA rules.

This session will be presented by Cheri Schuler-Faust, CMC Cataloger.

SWAN eXpo 2020 Web Series
Providing Virtual Outreach Services

Join the Outreach Services team, David Kelsey and Lynda Spraner, from the St. Charles Public Library in sharing virtual outreach services in this time of limited physical contact.

Knowing that our seniors and homebound patrons rely not only on the physical items shared by our libraries, but through programs and personal engagement, some creative solutions have allowed us to stay in touch and connected.
Introducing....
SWAN eXpo 2020 Web Series

Library Check List

- **Complete/Update Reopening Webform**
- SWAN will coordinate activation of Curbside Communicator (test and practice)
- Need Due Dates Extended? **Complete Webform**
- When your book drop is open, let us know (send in a support ticket)
- **Verify Curbside Info** is correct

<table>
<thead>
<tr>
<th>Library</th>
<th>Curbside Pickup?</th>
<th>Curbside Communicator</th>
<th>Book Drop</th>
<th>Fine/Free</th>
</tr>
</thead>
<tbody>
<tr>
<td>Glen Ellyn Public Library</td>
<td>Yes</td>
<td></td>
<td></td>
<td>Fine Free</td>
</tr>
<tr>
<td>Westchester Public Library</td>
<td>Yes</td>
<td>Yes</td>
<td></td>
<td>Fine Free</td>
</tr>
<tr>
<td>Bloomingdale Public Library</td>
<td>Yes</td>
<td></td>
<td></td>
<td>Fine Free</td>
</tr>
<tr>
<td>LaGrange Park Public Library District</td>
<td>Yes</td>
<td></td>
<td></td>
<td>Fine Free</td>
</tr>
<tr>
<td>Geneva Public Library District</td>
<td>Yes</td>
<td>No</td>
<td></td>
<td>Fine Free for None, 2 remaining</td>
</tr>
<tr>
<td>Aceri Public Library District</td>
<td>Yes</td>
<td></td>
<td></td>
<td>Fine Free for None, 1 remaining</td>
</tr>
<tr>
<td>Palos Heights Public Library</td>
<td>Yes</td>
<td>Yes</td>
<td></td>
<td>Fine Free for None, 2 remaining</td>
</tr>
<tr>
<td>Bedford Park Public Library District</td>
<td>Yes</td>
<td></td>
<td></td>
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Questions & Follow-up

Send questions to our online ticketing system at help@swanlibraries.net

Visit the SWAN Support Site for access to recorded sessions. https://support.swanlibraries.net

Submit a request for additional training topics. Help > Request Forms > Request Training or Consultation