

Value of Resource Sharing luncheon, 5th edition
Friday, June 22, 2018, 12:30-2:00pm
New Orleans Hilton Riverfront, Newberry Room

Participating:

Peter Bae, Princeton University; Peter Collins, University of Pennsylvania; Tom Delaney, University of Colorado at Boulder; Melissa Eighmy Brown, University of Minnesota; Megan Gaffney, University of Delaware; Holly Kozlowski, Columbia University; Aimee Lind, Getty Research Institute; Lars Leon, University of Kansas; Micquel Little, The Claremont Colleges; Kurt Munson, Northwestern University; Mike Paxton, University of Chicago; Matthew Sheehy, Brandeis University; Sydney Thompson, North Carolina State University; Dennis Massie, OCLC Membership & Research.



Summary

Our overall theme this time was all about the patron, with three major sub-themes:

- Rethink policies that act as barriers to a satisfactory patron experience.
- Communicate with patrons in ways that make sense to them and are convenient to them.
- Strive to better understand what the patron needs, wants and values.

Top takeaways under the “rethink policies” theme:

- 1) Holly reported that at Columbia they have expanded their data analysis of Borrow Direct data to include ILL data as well, and that their findings from the original analysis still hold true:
 - Borrowers at other institutions exhibit remarkable compliance with items lent by Columbia.
 - Term-length loans more effectively address need and encourage compliance.
 - Demand is highest for “high-use” titles; risk to “rarely held” titles is very low.

Further, at Columbia they found that by extending loan periods for their own patrons and extending the grace period to 3 days significantly cut down on patron fines, which made for happier patrons.

- 2) We spent a chunk of time talking about how it is harder to give longer ILL loan periods to some formats, particularly AV. Some of the barriers to lending AV include:
 - AV is used for instruction locally in the media center.
 - Sometimes one person is in a position to keep the lending policy restrictive. And media selectors often have a personal connection with the items in their collections.
 - Paid extra money to have performance rights added to license, which makes the AV items riskier to lend.

But if one place lends AV, it becomes easier for other libraries to point at them and go “They do it! Why can’t we?”

Top takeaways under the “communicate with patrons” theme:

- 1) We wondered if reminder emails to patrons that items are about to be due are effective.
- 2) Peter C. noted that communications with customers in a business context aren’t overtly based on behavior control, unlike most library/circ/ILL communications. We should communicate with patrons in the same way a bank communicates rewards linked to a credit card. Reminders, statement. We have the right to do this communication once patrons have checked out an item. But what tool to use to do this, since ILL management system and ILS’s don’t do it well?
- 3) Melissa mentioned that Alma does a good borrowing activity letter and overdue notifications.
- 4) Mike would like to have data on how many notification emails to patrons get opened.
- 5) Aimee posited that if an email from the library isn’t tied to some necessary action or real consequence, many won’t read it. Kurt agreed that an email to a patron works best when it has a specific action item associated with it.

Top takeaways under the “strive to understand patrons” theme:

- 1) We started this portion of the discussion by wondering: why do we even need to give due dates? Unless someone else needs something, let the patron keep it until they are finished with it. At minimum perhaps it should be standard for us to ask patrons how long they anticipate needing something when they are requesting it.
- 2) We discussed a number of methods for finding out what patrons value.
 - Lars suggested using AI to send targeted emails to specific populations. Timing would be important; faculty grant season would be a good time to target faculty.
 - Megan wants to contact those who start to order something but don't complete the request. Why did they stop?
 - Melissa mentioned that at Minnesota they learned that that registration process was too arduous for patrons. So they got rid of the registration form and hacked into headers to get patron info.
 - Lars and Micquel advocate asking open-ended questions in patron surveys. Kurt developed a set of specific set of questions to ask patrons in certain departments who borrowed things via ILLiad.
 - We confirmed our conclusion from the Midwinter session that multiple of us should do ILL patrons surveys using various approaches and come back together to compare notes.

Rough Notes – attendees, please feel free to make these notes better/more complete!

Longer loan periods

Holly shared handouts and gave an update on the impact seen on Columbia's ILL operation from offering 16-week loan periods for returnables they send out to other libraries, a policy they instituted starting in April 2017. The policy change was based on analyzing data from their Borrow Direct activity, lending returnables to the other 11 Borrow Direct institutions.

The Borrow Direct data analysis led to three conclusions:

- *Borrowers at other institutions exhibit remarkable compliance with items lent by Columbia.*
- *Term-length loans more effectively address need and encourage compliance.*
- *Demand is highest for "high-use" titles; risk to "rarely held" titles is very low.*

Fresh questions arose as to whether the Borrow Direct patterns of behavior would also apply to ILL activity (Answer: yes!), and whether the 16-week loan periods would lead to more recalls

(Columbia doesn't think so; it is hard to be absolutely sure due to some kinks in Voyager functionality).

In checking out borrowed items to their own patrons, Columbia found longer terms of use and extending the grace period to 3 days significantly cut down on overdue fines, which made for happier patrons.

Discussion of longer loan periods – with an AV focus

Someone mentioned that some borrowing institutions are giving term-long loan periods regardless of what lenders say.

It was suggested that it's harder to give term-long loan periods for all formats, particularly for A/V.

We talked about some of the barriers are to lending AV longer

Micquel – We have built policies around exceptions.

Megan – AV used in instruction in media center. Serving instructional use.

Collins -- Critical mass is important. If you have other copies in the system we can get in BD. But if only 3 own it we can't get it.

Matthew – ILL, good policies. Director didn't understand. Decisions. (?)

Dennis -- Sometimes it's one person holding sway over a policy. Buy-in needs to come from the top down.

Micquel – Performance rights. Paid all this extra money to have that added to the license. Makes these items more risky to lend.

Megan – When lending from big collections, doesn't feel personal. Film and video folks have a person connection with their collections.

Kurt -- AV thing and machine that went with it. Lifespan of 35 m film. Equipment is needed. (?)

Bae – Personal attachment to stuff. BD – Columbia will borrow all! Sometimes it is one person. Someone has to start. One will lend. I changed policy, no one knew.

Megan changed too.

Kurt -- Separate music library. Can't send out. Year 3 of Test. (?)

Bae – Allow him to use, book is to be used. Harvard archive. (?)

Kurt – A patron asked for a VHS of Frontline – basing his dissertation. Primary source. If want to get to the heart of what patrons value about our services, tell their stories.

Kurt -- Ask question: "Why aren't we? Iowa does."

Kurt -- Great to see Zack's work and build on it. At Northwestern we're seeing exactly the same behavior.

Aimee -- Having things out long time, art museums keeping it longer. (?)

Segue to talking about communicating with patrons

Sydney -- 90 days with a renewal. Does renewal matter? (?)

Mike -- Depends – short loan period from a public library, manipulate due date. (?)

Aimee -- Reminder gets people realizing they are nearing end of time.

Collins -- Reminders don't need renewal and front poking people, we need better communication. Rewards card, bank card. Isn't based on behavior control. Reminders, statement. We have the right to do this communication once they have checked out an item. What tool to use to do this, management system, ILS doesn't do it well.

Melissa – Borrowing activity letter in Alma, Overdue fines.

Mike -- Data on how many of those emails get opened.

Aimee -- If it isn't tied to something how many will read it?

Kurt -- Use it for things that have an action item associated with it. People who have fines, make it go away with open hamper food. (?)

We turned to what patrons value, and how we can learn more about what they value

Lars -- Understanding how patrons value, using AI we could target emails to populations. Faculty grant season.

Bae -- Wildest dream. What Peter said. Why do we need a loan overdue? Give it to patron, if no one wants it. Why even have a due date.

Collins -- Have the infrastructure we can make a strong case for that – need pieces in place before I drop that on people. Prove you have built a relationship.

Bae -- Bad reaction from within library. (?)

Sydney – Ask patron: how long do they need?

Kurt – We have not done our study yet. So much is based upon assumptions. Based on tragedy of 1974. If we had a better of idea of what they are doing, we could build policy on what they need and want.

Lars -- Ask open-ended questions. What's the value? Did such a study across Kansas. What's the story the public library can use with their board.

Micquel -- NYPL did it with us – community scholars not affiliated. Is there a place where we could gather the template?

Lars -- Value rating and free text comments – align reference with the number of items. (?)

Lars – Getting stuff illegally. Who does not use our service?

Kurt – It's not an amorphous group who is not using our service – find the slice that could benefit from us.

Megan – People who started but didn't finish (ordering? Using?) – Why didn't they?

Melissa – We can too – reached out – interesting response. (Service?) too arduous to use. We got rid of our registration form. Hacked into headers to get their identities.

Matthew – We create our own barriers – best intentions push people away. Celebrating people outside the library. (?) “I hate the library. Security procedures. Joy of Sex kept behind the desk.”

Micquel – We've been building a partnership with campus safety – they are in the library building all the time. The intention was to keep an eye on community users. But International students complained about the presence of campus safety officers.

Lars -- No log. (?)

Aimee -- If I have to explain a policy get rid of it.

Sydney – At desks with good intentions – idea is to focus on one topic and listen for those questions for 2 weeks – missing books. Write down and analyze it. Will do something for resource sharing. Service insight cycles. (?)

Micquel – 20 to 30 people are experiencing a problem if one complains.

Matthew – Important to bring up to your admin. Put it in an accreditation document. Provost and others talk about it. Being in consortia without question. Big advantage. (?)

Sydney – Are you getting questions from your director? (?)

Micquel – Renovation and space conversations is where this comes up. Moving to storage. Automated retrieval systems. Our services come into alignment when things are done to collection. Side angle for us. (?)

Kurt – Borrow multiple copies of something so we don't have to buy multiple copies. If you don't have it in your library it is a failure. 30 years ago didn't have anything in Turkish. Call upon the collective collection to use what we didn't buy – at least we have access to it.

Mike -- How many things get purchased that don't circulate?

Megan is asked, "Who is using collection—2 faculty?" Spoke to management. (?)

Matthew -- 50% want to browse the shelves. Our assumptions.