

## Partners May 10,2019 Discussion Notes

1. Value of Partners – for patrons and us
  - a. Patrons:
    - i. 1 single library
    - ii. Consistency
    - iii. New items on shelf-float
    - iv. More materials
  - b. Us:
    - i. Platform for innovation
    - ii. Networking and learning
    - iii. Saves money, effort, and space
    - iv. Know what patrons check out
    - v. Able to have special collections
    - vi. Keeps circulation up
    - vii. Sharing outside of collection
2. Role of MSL
  - a. Facilitation and leadership
  - b. Moderate discussion
  - c. Establish expectations
  - d. Guide in articulating value
  - e. Conflict resolution
  - f. Assist with outreach – be champions
  - g. Establish mentorship to new directors
  - h. Create, train, and market materials
  - i. Source of info.
  - j. Provide data; synthesize takeaways
  - k. Resource for system and group
  - l. Assume bigger op. and directional role
  - m. Assist with policy and procedure
  - n. Assist with coaching people out of partners, if necessary
  - o. Courier coordination
  - p. Monitor inconsistencies
  - q. Hold libraries accountable
3. Success:
  - a. We follow through on our agreements
  - b. User receives item in timely fashion – this includes having browsing collection
  - c. Every patron has consistent access to all materials (exceptions apply)
  - d. Libraries commit to borderless customer service, item ownership, and access
  - e. Libraries have capacity to fulfill local obligations
  - f. Our new directors and staff are supported
  - g. Libraries save money
  - h. Libraries take responsibility for damaged items
  - i. Libraries follow MSC guidelines
  - j. Libraries collaborate respectfully [respectfully?] and input is included and valued

- k. We recognize that we want to provide the same thing
- 4. Problems we need to solve
  - a. Not all libraries agree we are shared library
  - b. Courier
  - c. Internal practices conflict with partners' procedures
  - d. Holds – buying new only to send off [unclear]
  - e. Small libraries perceive that big libraries dictate how partners should run
  - f. Who do we escalate issues to?
  - g. Disagreement about replacement policy for damaged items
  - h. Some libraries experience lag of 30-60 days
  - i. Training new libraries and librarians – manage expectations
  - j. Libraries purchasing more than their fair share
  - k. Libraries serving partners before local patrons
- 5. Not all libraries agree that we are a shared library & libraries serving partners before their local patrons
  - a. Tension between person in front of you and person that is remote
    - i. Can we recognize that the remote person is also a patron?
  - b. My job is to serve the local patrons
    - i. Do we need to share patrons?
    - ii. Other sharing groups already do this
  - c. There is a lack of trust
    - i. Do we share both patrons and collections?
    - ii. Is it illegal to share and edit patron records?
  - d. Config doesn't differentiate patrons or collections
  - e. There is a need for local control
  - f. There is frustration for patrons, especially when libraries close together
    - i. Patrons already think of as one library – they get confused by different policies
  - g. Boards resist idea of one library
    - i. Can MSL lead best practices for libraries?
  - h. Limits to money and resources make it difficult to be one library
    - i. Not all libraries agree – discuss problem
- 6. Sharing patrons and standardize policies
  - a. Pros:
    - i. Easier for staff; seamless for user; ideal from admin. standpoint
    - ii. Good for all
    - iii. Consistency for patrons and staff; no confusion; problems can be resolved immediately
    - iv. Happy and unconfused patrons
    - v. Uniformity across the group; standardized training
    - vi. Patron's needs satisfied at point of service. No more deferment or delay in helping get something fixed/resolved.
    - vii. Significant time savings for MSC staff in identifying and resolving problems, troubleshooting, answering tickets
    - viii. To quote Bill and Ted: "Be excellent to each other."

- ix. Standardize training
  - x. Standard policies could be put in knowledge base for easy reference
  - xi. Standards help regulate the types of libraries who participate in the group
  - xii. Better purchasing power databases
  - xiii. User stats would be much more universal, aiding in comparison, etc.
  - xiv. Set a high standard for innovation and collaboration
  - xv. Better customer service
  - xvi. Convenience for patrons – seamless and consistent; ease for MSC staff; one set of procedures – libraries don't have to write/modify our procedures; consistent home locations for reporting
  - xvii. Standardized training
  - xviii. Would make everyone's work and understanding of "shared" very clear
  - xix. Could solve a lot of problems having 1 policy and trainings so all is done correctly across the board
- b. Cons:
- i. Confusion of patrons
  - ii. Getting all to agree
  - iii. If some libraries don't train for consistent data entry it could be a con.
  - iv. Some loss of local control/decision-making
  - v. Not every library supports fine-free
  - vi. I don't see any cons.
  - vii. Decide how to define "owning library" – Address? Original card library?
  - viii. Potential data-entry errors—misspelling, punctuation, etc. Who will monitor new records for accuracy?
  - ix. More potential for mistakes in user records; differences in library values (late fees/no late fees, etc.)
  - x. Some libraries charge to register patrons; some do not. How do we reconcile these?
- c. Barriers:
- i. Confidentiality
  - ii. Board/librarian/staff not getting the concept
  - iii. Getting locals on board with this
  - iv. Time and training to implement
  - v. Library board approval; changing perspective of librarians opposed
  - vi. Time
  - vii. Board will not send anyone to collection agency
  - viii. Board agreement
  - ix. Some services will always be restricted to a local cohort because of licensing or costs (e.g., databases) which would not be sharable/standardized.
  - x. Differing library card eligibility requirements set by boards; disagreement over what policies should be (I think the MSC staff should suggest these)
  - xi. Need to get rid of patron count as part of the cost-sharing formula
  - xii. Different cards—need one partner card; standardization.

## 7. Not one library

### a. Hurt patrons:

- i. Messaging to patrons pitched negatively
- ii. Inconvenient
- iii. When some libraries “hide” some collections from hold that are not authorized in SOP
- iv. Frustration that our staff can’t help them with their account
- v. Inconsistent policies lead to frustration
- vi. Item shadowing and other workarounds benefit patrons at one library but not the group
- vii. How does not seeing ourselves as one library hurt patrons?
  1. It creates/nurtures rifts that turn into policies which don’t solve the problems (I’m thinking of easy access to materials) they purport to solve – and sometimes they make them worse.
- viii. Patrons do not have equitable access if they are only able to access some of the shared collection [leased, Grab-n-Go, superior/inferior budgets. Though patrons might not know this...
- ix. Hurts patrons by assigning them different priority statuses
- x. Patrons don’t have convenient access to the items they should
- xi. Our patrons get caught in the crossroads between libraries and our internal policies. When our patrons aren’t able to proceed with their checkout, etc., our staff end up having to deal with the anger and unhappiness.

### b. Hurt library staff

- i. Customer service levels not met – staff feel handicapped
- ii. Not good service
- iii. I see it impacting staff a lot more than the patron—more leg work, more conflict between libraries, more complexity in the catalog for the MSC to address, etc.
- iv. Extra steps and inefficiency to contact other libraries for patron changes
- v. Not being able to provide the best customer service
- vi. Focus on issues that are concrete and can be measured
- vii. We are making more trouble and work for ourselves
- viii. Configuring, maintaining, and training on multiple different systems
- ix. Spend time dealing with inefficiencies instead of other work
- x. How we deal with each other, details on the back end, conflict management
- xi. Our patrons get caught in the crossroads between libraries and our internal policies. When our patrons aren’t able to proceed with their checkout, etc., our staff end up having to deal with the anger and unhappiness.
- xii. The customer sees us as functioning in a unified way—they put a hold on something and it just shows up! Magic!
- xiii. Staff is only affected by contentious meetings

### c. A few comments didn’t see an issue:

- i. Hasn’t really been a problem. We embrace the one big state library system...yeah!
- ii. The Grab-n-Go conversation helped resolve our main concerns

- iii. Our patrons are shielded from this
- iv. Not really a problem. But Grab-n-Go as per morning discussion, has addressed the staff problems.

8. Solutions to not acting as one library

- a. A mechanism for removing problem libraries, viz., libraries who (which?) repeatedly and knowingly violate certain procedures. Sorry!
- b. Having standards from chain of command, and conflict management
- c. Simply realizing that for all intents and purposes (i.e., from the patron side) we function as a single library
- d. Allow all libraries to modify user records with policies like verifying ID to protect patron privacy
- e. Agreeing on standard policies that will ease the burden on MSC staff giving them more time to focus on tickets and projects
- f. We need to stop thinking of our patrons as patrons at our individual institutions and think of them as patrons of the sharing group
- g. No more Grab-n-Go
- h. Revise partners policy and SOP to make it explicit that we should view ourselves as one library and function as such
- i. Allow us to modify each other's patrons
- j. Shared access to patron records; train staff for consistent data entry
- k. Original convo about not sharing patron records—only few (1-2) dissent, maybe different feeling now?
- l. Accentuate the positive—have/memorize a message about why there is value in sharing and partnering
- m. Transparent governance of the group and unified funding
- n. Willingness to contact other libraries to solve issues – immediately
- o. There is no easy solution to fundamental disagreements on sharing principles
- p. Philosophical contract/agreement? (new director)
- q. Involving staff better
- r. Standardized configuration and training
- s. Have all staff involved in partners, review Elizabeth's awesome how-to videos, and email to the group that they watched them before July 2019
- t. Patron maintenance allowable
- u. Involve and train our trustees

9. Next Steps:

- a. MSC staff can review everyone's policies and share with group the differences, including cataloging policies
- b. We can look at BridgerNet
- c. We can form a committee
- d. We need talking points for our boards and patrons
- e. Need to be explicit about our expectations for the group
- f. Create a map/pamphlet that shows partners and policies

