

WELCOME TO

BACK IN

CIRCULATION

2016



iSchool

SCHOOL OF LIBRARY & INFORMATION STUDIES
UNIVERSITY OF WISCONSIN-MADISON



2016 Back in Circulation

Monday, October 10

Room 325/326

8:00 Registration

8:45 Opening Remarks

9:00-10:00 a.m. Keynote Presentation

Access + Services: Putting Users First in Practice

Access Services staff are, for most users, the face of the library. Every day, you and your frontline staff create and support crucial connections between the many parts of library operations that intersect at the circulation desk: collections, patrons, information, services, facilities and policies. Sometimes, all these things work together to create a great user experience ... and sometimes, they don't. In this keynote, Courtney Greene McDonald will focus on simple, practical ideas to empower you and your staff to bring the best out of whatever the day brings you.



Courtney Greene McDonald is Head of the Discovery & Research Services department at the Indiana University Bloomington Libraries. She has presented and written on a variety of topics, most recently on user experience and discovery. Her second book, *Putting the User First: 30 Strategies for Transforming Library Services* (ACRL), was published in 2014. Courtney earned her Master of Library Science degree, as well as a BA in English and Journalism, from Indiana University-Bloomington, and holds a Master of Science in Human-Computer Interaction from DePaul University in Chicago. Find her on Twitter: @xocg

10:00-10:15 Break with refreshments



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10:15-11:15 Concurrent Sessions

Room 309: Automatically Yours! Renewals Made Simple

Have you been wondering how the whole auto-renewal of patron library cards and library materials actually works? Let us tell you how we implemented both of these renewal processes which have thrilled our patrons, saved staff time and elevated patron service. Sounds too good to be true? We were amazed at the ease of implementing these patron friendly processes and the positive feedback from patrons and local press. We will share examples of our marketing materials and auto-renewal verbiage used in email and printed communications to our patrons. We will provide access to materials that will clearly lay out the steps needed for implementation addressing questions, concerns and outcomes.

Presenters: **Christine Lees** works as the Assistant Circulation Manager at St. Charles Public Library and **Kate Cobo** works as the Customer Services Manager at Geneva Public Library District.

Room 325/326: Turnover, Turmoil, and Training....Oh My!

Turnover is an inevitable part of life in Circulation, and with that turnover comes all the fun of the hiring process. 2014 was a year with an exceptionally high amount of turnover at the Mount Prospect Public Library, causing us to examine our training process. Recognizing that the underlying training structure was already very strong, we sought to improve upon a system that was already there, making it even stronger. MPPL has been using this new training program for about a year, and it has made a world of difference with new staff! We will share our training missteps with you, and how they led us to a program that has not only made training so much easier, but has strengthened our department as a team.

Presenters: **Janine Sarto** is the Head of Circulation Services and **Samantha Chiappone** is the Assistant Head of Circulation Services at the Mount Prospect (IL) Public Library.

Room DE335: The Ten Commandments of Circulation

As academic libraries require the use of student employees to keep the library open, student employees are often the first or only person a patron interacts with. It is crucial these employees model unparalleled customer service skills in order to increase patronage by the campus community. This session will detail ten "rules" I have compiled that serve as a persistent training tool for staff and student employees at the circulation desk at the Kraemer Family Library on the UCCS campus. These rules provide a framework for providing "value-added" customer service for our patrons. They also offer supervisors a quick reference guide for initiating coaching sessions. Modeled after the list of rules espoused by special agent Leroy Jethro Gibbs from the TV show *NCIS*, these ten quick tips will empower your staff and create outstanding patron experiences without fail.

Presenter: **Jon Hall** is the Circulation Coordinator at the Kraemer Family Library on the campus of the University of Colorado, Colorado Springs.



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11:15-11:30 Break with refreshments

11:30-12:30 Concurrent Sessions

Room 309: Getting Materials Back on the Shelf and People Back in the Door: New ideas to address an old problem

All libraries struggle with customers who return items late or not at all. How your library addresses this situation makes a big difference for your collection, your library's bottom line, and your customers' ability to use the library successfully. This session will cover evaluation of patrons with troubled accounts – the patterns of use, average outstanding balance, and the library approach to fines and lost items. I will cover different options Ames Public Library considered and implemented and the resulting impact on patrons with debt. Attendees will come away with information that could be used to propose and support their own ideas. Please come and share your innovative measures and how they have helped your library to make a difference.

Presenter: Tracy Briseño is the Customer Account Services Manager at the Ames (IA) Public Library.

Room 325/326: Expanding The Reach of Reference: Training access services staff to provide ready reference at the University of Michigan Library

The University of Michigan Library has embarked upon a path to transcend the traditional “reference desk” model by training access services staff in our Operations division to provide ready reference and information service to patrons from any service point. To achieve this, we developed a comprehensive training program that covers the assistance that all service points and staff should be able to provide. We created online modules using survey software Qualtrics to provide accessible training to all of our full-time, part-time, and student public services staff. In this presentation, we will discuss how and why we designed the training, our efforts to sustain the training for the future, and the challenges we encountered.

Presenters: Shannon Moreno is an Information Resources Assistant at the University of Michigan Library and **Jasmine Pawlicki** is an Onsite User Services and Course Reserves Assistant within the University of Michigan Library Operations department.

12:30-1:45 Lunch at the Pyle Center, 1st floor



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1:45-2:45 Concurrent Sessions

Room 309: May the Force be with You: Diversity in the (work) force

“How do we get a diverse pool of candidates?” This is one of the most common questions that I have received in my short time as the Director of the Office for Diversity, Literacy, and Outreach Services at the American Library Association. It’s clear that as a profession we know that we need to be more inclusive and desire to have diverse pools of candidates for each and every job. Libraries have come to understand that equity and diversity in the search process is essential to increasing the diversity of candidate pools. However, a shared commitment to equity and diversity is not always enough to get people applying for position or working together effectively. In this session we will talk about diversity trends in the workforce, recognizing our own biases, and the role management can take in remediating some of these issues.

Presenter: Jody Gray is the Director of the Office of Diversity, Literacy, and Outreach Services of the American Library Association.

Room DE335: Circulation Policy: The groundwork for patron-friendly service

Exceptional customer service relies on empowered frontline staff members who can make customer service decisions based on an organization’s values rather than its rules. In an effort to bolster its customer service, the St. Joseph County Public Library overhauled its circulation policy to promote flexibility and leniency at the circulation desk. A committee of multi-leveled staff members rewrote the entire policy in just three months. In this session, attendees will learn the circulation policy change process from choosing the committee to implementing the policies for a smooth transition. By the end of the session, attendees will understand how circulation policy relates to customer service and how their library can successfully implement changes.

Presenter: Lisa O'Brien is the Manager of Circulation Services at the St. Joseph County (IN) Public Library.

Room 325/326: Bouncing Forward, Not Back: Helping your team discover and develop resilience skills for the workplace

Why is resilience important to library staff? Resilience is defined as a set of skills that allow people to successfully navigate challenging situations and thrive afterwards. Although resilience is often assumed to be an inborn trait, it can be learned, practiced, and cultivated. Access services staff work in an often demanding arena in which some people adapt readily to constant change and workplace challenges, while others struggle to cope. This presentation will discuss a five-level model of resiliency; describe behaviors of resilient people; and explore ways in which we as managers and team leaders can develop our own resilience skills and support our staff to do the same. Participants will evaluate and reflect on their own level of resilience and take away strategies to implement in their own libraries.

Presenter: Anne Schultz is a part of the Access Services team at the University of New Mexico’s University Libraries.



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2:45-3:00 Break with refreshments

3:00-4:00 Concurrent Sessions

Room 309: Creating Baselines of Skill

Thompson Rivers University Library was interested in expanding the roles of clerks and library technicians. This is a worthwhile goal, but not without effort. We made incorrect assumptions about the basic knowledge of our support staff and a new procedure for inventorying our collection brought the skill deficits into sharp focus. We will talk about the inventory project as a way of examining the challenges of establishing baselines of technical knowledge for our staff. Techniques we used to ensure the staff had the tools to do new tasks will be included. Empowering staff means more than giving them different tasks to do. It means giving them an attitude and the tools to handle new situations. By giving all staff a baseline of skills, we can be confident that they are up to future challenges.

Presenters: **Michael Purcell** is the Systems Librarian and **Katherine Watmough** is the Access and User Services Librarian at Thompson Rivers University in Sunny Kamloops, British Columbia, Canada.

Rom 325/326: Putting the Fun in Fines

To fine or not to fine? That is the question! Join staff from the Lester Public Library as they share several simple and easy ways to turn fines into marketing gems. Black Friday Sales, Scratch Cards, Fables for Fines, Mustache Giveaways, \$5 Forgiveness and more. Your patrons will be begging to pay off their fines!

Presenters: **Terry Ehle** is the Youth Services Librarian and **Chris Hamburg** is the Adult Services Librarian at the Lester Public Library in Two Rivers, WI.

Room DE335: Stand Up and Lead or Sit Down: Just do it

Everyone wants a leadership position, but few know how to manage change. Change can often cause losses in productivity, morale problems, and dysfunctional behavior when there is a lack of communication. Library administrators and leaders must learn how to not only manage change, but also how to manage staff experiencing frustration when faced with significant change. Participants in this workshop will learn: how to recognize and evaluate your leadership style; three skills that are necessary for successful management; tips on how to develop effective supervisor/employee relationships; three things to avoid when leading people; and steps to take when change takes place in the office

Presenter: **Dorothy Hargett** is a Librarian and Head of Access Services, at Regent University Library in Virginia Beach, VA.



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4:00-4:15 Break with refreshments

4:15-5:15 Concurrent Sessions

Room 325/326: You can UX Too! Applying User Experience Methods in Circulation

Your patrons are users. Circulation is an experience. Why not bring user experience strategies to library circulation? User experience design strategies can be used to examine circulation workflows, and you don't have to be a UX expert to put these methods into practice. We'll cover the basics of customer journey mapping, user stories, personas, and A/B testing, and then share our real life experience in sharing these concepts with librarians and staff unfamiliar with traditional UX. You'll leave this session understanding how to apply basic UX techniques to traditional circulation experiences, and how to lead user-centric improvements in your library.

Presenters: **Denise Foley** is an Access Services librarian at the University of Michigan Library. **Megan Hartline** is the Head of Access and Public Services at Auraria Library, serving two universities and a community college in downtown Denver.

Room 309: Farewell, Dewey! How One Library Implemented a Word Category System

In the summer of 2013, I read yet another article about a library that had eliminated the Dewey decimal system. After years of discussion, this idea was continually dismissed by our administration. When leadership changed, I suggested a field trip to Grand Rapids, MI, where Dewey had been dropped. All of our department heads made the trek north, and the rest, as they say, is history. In this session, I will share the path that Wells County Public Library took to create and institute the WordWise system. This will include our research into other libraries, the months of meetings to select categories, the process of getting buy-in, and how we relabeled 42,000 volumes. It has been a worthwhile process; one that could inspire other libraries to make the commitment to a monumental change.

Presenter: **Teresa Dustman** is the Circulation Manager at Wells County (IN) Public Library.

6:30 Optional Dinner Groups

Meet at your restaurant and continue the conversation
Sign up at <http://tinyurl.com/circdine>



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Tuesday, October 11

8:30-9:00 Refreshments

9:00-10:00 Concurrent Sessions

Room 309: Go Fine-Free and Still Get Your Stuff Back

Three public libraries in northern Illinois changed the way they approach getting materials back by eliminating overdue fines, and the results have been eye opening. The libraries went fine-free in an effort to remove the financial barrier to service created by charging fines, as well as the negativity and time spent collecting fines. The results of this change have been overwhelming positive. Not only are patrons returning library materials, but they are returning their materials earlier, request wait times have remained steady, and everyone is happier. This presentation shares what information is needed to make the change, the planning involved, procedures and policy implemented by each library, and what to expect once the change is made.

Presenters: **Stephen Territo** is the Head of Circulation at the Vernon Area Public Library District in Lincolnshire, Illinois. **Gary Christopherson** is the Access Services Administrator at the Algonquin Area Public Library in Algonquin, Illinois. **Matt Womack** is the Executive Director for the Ela Area Public Library District in Lake Zurich, Illinois.

Room 325/326: Building a Culture of Success from the Inside Out

Is it possible to increase library usage, improve your patron/user experience, and have a healthy and thriving library staff? Yes! This session provides techniques that can be employed by ALL library employees from frontline staff to upper management. Learn from an assistant director's and an access services manager's perspectives on how to increase circulation, have more satisfied patrons and gain more support from your community. The key is to first focus on improving the culture within the library before taking on ambitious initiatives to encourage increased usage and library support. The best part is you can do this without additional cost! Join us for a lively session that details what the Hancock County Public Library did to reach record circulation, increase patron numbers, and improve the library user experience.

Presenters: **Barbara Roark** is the Assistant Director and **Cody Flood** is the Access Services Manager at the Hancock County Public Library in Greenfield, Indiana.



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Room DE335: Library Space Panel

- **Visualizing Library Space Use**

We all know how many bodies come and go through our libraries' gates, but when do they come and where do they go in the library? This presentation describes how by using a unique dataset in RefAnalytics, the library is able to map out use by floor and seating type. Head counts are taken hourly and data is visualized using charts and graphs. Results of the analysis help form policy decisions and it's possible to post stats online to show users available rooms and crowd level. While taking head counts, staff are able to pick up books, straighten furniture, and alert building maintenance to problems. Overall, the statistics give everyone insight into how space use transforms the library into a vibrant community place.

Presenters: **Bethany Sewell** is the Access Services and Reference Librarian and **Andrew D'Apice** is the Head of Circulation at The College of New Jersey.

- **Study Room Management**

Like many academic libraries, the University of Arkansas Libraries offer study spaces for our students. Prior to January 2016, we offered four checkout-able group rooms and four drop-in individual rooms. The first-come, first-served nature of these rooms, however, made it difficult for students to plan ahead. In addition, we introduced three new high-tech collaboration spaces and knew we needed to find a reservation system to help manage the rooms' use. During the Spring 2016 semester, we rolled out a reservation system. In this presentation, I will discuss the decision process for choosing a room management software including the differences between our ideal functions and what we were able to find. I will talk about the steps involved with set up, patron response and system use, and issues we needed to solve after the initial rollout.

Presenter: **Kathleen Lehman** is the User Experience Librarian at the University of Arkansas, Fayetteville.

10:00-10:15 Break with refreshments



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10:15-11:15 Concurrent Sessions

Room 325/326: Off Your Seat and On Your Feet: Providing good customer service

What is the definition of "good" customer service? How do personalities, policies and procedures all affect customer services? What are the steps and the "10 commandments" of customer service, and what do we do with those difficult patrons? This session provides answers to those questions and includes aspects of circulation front-line service as well as some readers' advisory services which many small libraries incorporate into their circulation services. The presentation includes some role-playing examples of how to deal with difficult situations, examines the importance of good policies and procedures, and offers practical tips for delivering good customer services in not-so-good circumstances.

Presenter: Maryann Mori is a Consultant with the State Library of Iowa.

Room 309: Inventories Matter: Make managing collections more manageable

Most libraries, especially those with large collections, avoid inventories due to the scope and complicated nature of the job. The Binghamton University Libraries had never conducted an inventory, citing the overwhelming nature of handling over 2.5 million monographs. However, an opportunity presented itself and with support from the University, the Libraries developed a 4 credit research inventory project. This project produced streamlined workflows staff adopt into their workday, making inventorying manageable. This presentation will discuss the Libraries' experience creating, conducting, and evaluating this project. From its initial proposal, to marketing the project to students, designing the curriculum, and data analysis, this project continues to shed light on possible efficiencies and the measured value of finding missing, rare, and out of place materials.

Presenter: Nancy Abashian is the Head of Reader Services and Resource Sharing at Binghamton (NY) University Libraries.

11:15-11:30 Break with refreshments

11:30-12:30 Concurrent Sessions

Room DE335: Course Reserves: Finding the middle ground

Traditionally, course reserve requests at the University of Arkansas, Fayetteville Libraries came directly from instructors. A few years ago, we put all the books that the libraries owned and were listed as course materials for that semester on reserve. We found the effort did not pay off in increased circulations. Over the past academic year, we've tried another approach: using a simple, online form on Desk Tracker, we've captured student requests at the service desks for materials that aren't on reserve. From



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these requests, we have contacted the instructors of those courses. Because of these interactions, we have educated more instructors about our course reserve offerings, and increased the materials available to students without the extraneous work of our earlier “all-in” experiment. This simple solution revealed a middle ground focused on what students need.

Presenter: Kathleen Lehman is the User Experience Librarian at the University of Arkansas, Fayetteville.

Room 325/326: The Chaos of Change: How to manage and motivate staff in changing times

Within one year, the Westmont Public Library migrated to new integrated library software, rolled out self-check units, tagged our entire collection for RFID, lost three managers, and launched a new website. We navigated all of these successfully because of a plan originally intended for circulation staff, but later implemented library wide. Many people do not like change and staff often feel uncomfortable about new routines. Our motto was positive communication. Our plan included months of training, scripts for staff, motivational pizza parties and more. After all of our efforts, change is now embraced. This presentation will outline the plan and how we implemented it. Change is inevitable, and having a few tricks in your pocket can be what transforms the word change from something scary into something positive.

Presenter: Brittany Hoornaert Smith is the Assistant Director and Head of Patron Services at Westmont (IL) Public Library.

Room 309: Library Lisa’s Adventures at School: How to increase circulation through outreach

“Library Lisa” is how Lisa Leuck is known in Elgin, Iowa, where she is the director of The Elgin Public Library. While many small libraries are seeing a decrease in circulation, this small, rural library implemented ways to make circulation soar (increasing by 10,000 circs from 2013 to 2015), making it a “Star” library in Library Journal for 3 years in a row. One significant change was an outreach program that included remote book check-out to the elementary school. Lisa’s presentation will cover the need for and value of outreach programs in building community and promoting literacy. She will discuss how the program functions and the impact on teachers, students, and parents. Discussion of complementary programs and how to make such a program fit within other communities will be addressed.

Presenter: Lisa Leuck is the director of the Elgin (IA) Public Library.

1:30-2:30 Optional Afternoon Activity: Tour of Memorial Library

Memorial Library, on the UW-Madison campus, houses the largest collection (over 3 million volumes) in the state. The Library is located across Langdon Street from The Pyle Center and the entrance is around the building on Library Mall, 728 State Street. Groups will meet in the lobby at 1:30 p.m. Advanced registration required, <http://tinyurl.com/circetour>