

Student Success Working Group

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>> JANE SANDBERG: Thank you very much and thanks for getting this all set up. You have answered every single possible question I could have had, Benjamin. Is the volume working?

>> BENJAMIN MURPHY: Sounds good.

>> JANE SANDBERG: Welcome to the student success group. I'm so glad to hear whether you are one of our regular attendees or whether you are one of the first people attending the group or somewhere in between. We meet quarterly and everybody is welcome to join our calls. hopefully I will see a lot of the debtor future groups as well. This is going to be an interactive, discussion-based meeting. I won't be talking very much except the beginning to get us started. I'm going to really look forward to having you provide the dialogue. We will be keeping an eye on chat as well and we will make sure anytime that he would put something into chat we will repeat the question by voice so it is caught for the YouTube recording that's going to be made of this conversation.

Since this is the first interactive or more interactive session of this track, I do want to go over the Evergreen code of conduct before we get started just to set the tone and set the expectations for this conversation. I'm just going to read the quick version today. Evergreen event organizers are dedicated to providing a harassment free experience for everyone regardless of gender, gender identity, expression, sexual orientation, disability, physical appearance, body size, race, age or region. We do not tolerate harassment of event participants in any form. Sexual image and imagery is not appropriate for any event venue including talks. Event participants violating these rules would be sanctioned or expelled from the event without a refund at the discretion of event organizers. Harassment includes but is not limited to [READING SLIDE VERBATIM] ... Posting or threatening to post other people's personally identifying information, advocating for or encouraging any of the above behavior and repeated harassment of others in general. If someone asks you to stop, then, stop.

Oftentimes with this group, we start out with some introductions of the whole group. But, since we have so many participants, I think that would take up a lot of our time. So I'd like to instead start off with our first agenda topic which is the looking module and Christine Burns has kindly agreed to facilitate that. All right, Christine, do you have everything you need to start your portion?

>> Can you hear me now?

>> BENJAMIN MURPHY: Yes.

>> Okay, you didn't hear my railing about... about being scared to talk to everyone. So I am Christine, I am with the [indiscernible] cooperative and I wanted to take this opportunity to talk about the looking module. I think we have talked about it in a student success group in the past. But as Jane mentioned there are some new people here who might not usually participate in a student success meetings. So I thought this would be a great time to talk about booking. I just have a couple things to talk about and then I think we should open up discussion. Basically, Evergreen has a booking module. I think some people know about that and some people do not. The booking module can be used to reserve catalog or not catalogued resources for a particular set of time. It doesn't follow your regular circulation duration [indiscernible]. The booking module I believe was designed by postsecondary libraries primarily to be used to circulate non-bibliographic items, things like laptops, doctors, meeting rooms. But it is also used to reserve catalog items. DVDs and videos. Things that are in your collections. The booking module does not have a public facing interface. So only staff can see, create edit and view reservations. But recently, after some development work was done, patrons can now view their own reservations in the OPAC. They can't place them, which I think is desired, but they can see the status. Here at [indiscernible] we currently have about five of our per secondary libraries using the booking module. And, we have not promoted it to our public libraries, though everyone does have access to it. Up until recently, the booking module is not really had a lot of development work done to it and there were some issues. Recently, a lot of development has been done and there are less issues

with booking. So maybe in the future we will roll it out for the public libraries. It's really good for meeting rooms and things like that which I think will be popular for public libraries to be able to book. There are some challenges. There's booking bugs, which I would like to talk about. And basically my goal for this meeting today or talking about booking today is to find out who else is using booking, find out if anyone else has been interested in using bookings but have found there's barriers that have prevented them from using it. I would like to find out who was interested in potentially using the student success group to develop an official, a medium official [sounds like] wish list for booking. So I feel like In talking for an hour. So let's start discussion there. Does anyone have any initial comments?

Is there anyone on the line that is using the booking module in their library or their consortium?

[crosstalk]

>> This is John at CW Mars. We've tested it and discussed it with our libraries. One thing our libraries were hoping it would be good for is the Library of Things where you want to check out a bike but you don't want it on just any day, you want to plan for it.

>> Yup. So you guys have tested it. You haven't is there something plummeted using it. Is there something in your testing that prevented it? I think using it in your example like a library of things is a really good example of why you would use the booking module.

>> Not of the libraries wanted to pilot it. We share the information. We have it on our test server so they could play. We were looking forward to, I think it's 3.5 where the big enhancements are, is it 3.5?

>> 3.4 and 3.5, they're introduce more and 3.5 absolutely.

>> We did find a lot of things wrong, things that did not work well. Of course, by various would like it to be more accessible from the patron account and the OPAC. But I think after we upgraded to 3.4 and 3.5 we can give it another test and push to see if and when wants to try it.

>> I'm happy to help or anything if you have questions about the booking module. And I would be very interested in talking to you after you have upgraded and look at it again, as well.

>> Okay, sure. We can share our list of findings with you. What[[indiscernible]] are you using it on?

>> We are now on 3.5. We just upgraded over on May 18, I believe.

>> Hi, this is Elizabeth Thomsen from NOBLE. We are in exactly the same situation as CW Mars. We did some testing, looked at it, have it on our task force 3.5 have both public and academic libraries that are looking at it for different reasons. The Wi-Fi hotspots is a popular topic. But also really wanting people to be able to book things themselves.

>> JANE SANDBERG: I have a question about the patrons booking items, themselves. Because I know if we started using that at our library, I knew there would be a lot of concerns of how do we make sure that people don't book things for 7000 hours it's not allowed other students to do it, or how do we make sure that students only don't book things five times a week, there isn't really a concept of those kinds of limits of booking modules, yet. So I'm wondering what would it take in order to get to the goal where patrons can place their own bookings?

>> Maybe it's a separate permission. I know we talk to academic libraries about wanting faculty to be able to book certain things rather than students. Better loan rules, permissions, this type of things. Or something is just added to particular patrons, I'm a

registered booker. But really wanting, basically, people are booking things like rooms using other software, the same kind of software that does museum passes and that kind of stuff. So that's why they're seeing it this way.

>> I definitely didn't want to take up too much time with booking, especially because it's not very widely used. But I did include a link to a list of our booking bugs or the bugs related to booking, I put them on a spreadsheet and I've added a link in the Student Success Working Group agenda there. So that you can see them. Again, like I said, I didn't want to take up too much time but if there is other questions or things we can continue to talk about, but I know everybody wants to talk about all the new stuff -- the closures and things that have happened due to COVID. I'm okay to move on if there is nothing else.

>> JANE SANDBERG: Thank you, Christine. Do you want to look at the list of booking bugs really quick, together?

>> We could. Do you want to pull it up on your screen? The other thing I have, again, I had, if you wanted to, I could share my screen. Oh, you have a there. Let's look at your screen.

>> I just wanted to let you all know it chat, Jennifer Pringle said it might also be useful to be able to set based on resource type or whether or not patrons can book it.

>> So if it was a meeting room or something patrons could book at themselves, but potentially DVD resources or catalog things could not be booked by patrons. So one of the big things with booking is that there is no link with circulation. As I mentioned, booking can be used for catalog items and not catalog items. Works really well if you're doing all the catalog items. But when you start trying to use both catalogs and catalog items, you will find that there is no link to circulation for the catalog items. There has been quite a bit of discussion over the years on this and it seems like it's quite a complex issue. There's been some good ideas about how to easily create a reference

between those two tables. And a lot of the sort of wish list things that we've come up with are dependent on a link between booking resources and circulation. I think it is asset copy, [sounds like], it is in that first launchpad, the [indiscernible]. It is also, booking, the ability to assign attributes to your resources and then limit your available resources by those attributes. Those things are not really working very well. It's pretty buggy. There is a wish list request, [indiscernible], James Forney [sounds like] has suggested a way to reimagine the resource creation process so that the attributes are included in the resource table as opposed to separate tables. So a couple of those bugs are dependent on one another. It requires some high-level thinking of how we want it to work, I think. The big ones for us right now are that is currently possible to create duplicate bookings or to reserve an item twice. So that's causing immediate --

[crosstalk]

-- So, you can see, there's quite a list here. I don't think we want to go through all of them. I've included a couple that are not booking specific, like here are the OPAC that are handling of date and time formats, because they are very related to the use of booking. This one, as I mentioned before, patrons can view their reservations in the OPAC. But because of this date format issue, they see the time twice. Whereas the Sitka library [sounds like] the post secondary's do hourly loans. So we have set it up so the OPAC can display the due time. Those two features are sort of conflicting with one another. So there are some good comments in this bug, again, around that are handling of date and time formats.. That it's not just specifically to booking related. Does anyone have any questions? Jane, was there anyone to anything specifically that you wanted me to discuss?

>> JANE SANDBERG: I think this has been great, Christine. Why don't we leave it open for another minute just for anybody else who has a question. Then we can move on to the next topic.

>> I just want to mention if anybody is interested, Christine actually put together several videos for our libraries look at booking in screen five [sounds like] if anyone is wanting to look and see what it looks like in our system those are available to watch.

>> JANE SANDBERG: Those videos sound hopeful. I see there is something in the chat. It's a link to the videos. Thanks so much, Jennifer, for posting those. All right. Thanks again, Christine. I think will move on to the next topic now, thank you, which is COVID-19, definitely on everybody's minds. Eva Cerninakova kindly agreed to provide an introduction to this topic. So Eva, can you please introduce?

>> Yes. I hope you can hear me.

>> JANE SANDBERG: We can!

>> My name is Eva Cerninakova. Greetings from the Czech Republic. I work in a public library in Prague. When we were planning the agenda for this meeting, Jane was asking about topics and she was afraid we were all tired of COVID-19. But for me it is quite interesting, because there is quite similar situation in the Czech Republic where there was a similar situation in the Czech Republic, were similar to it was in the United States or Canada or worldwide. It was quite a big challenge because the closing of libraries in the Czech Republic and I suppose in the United States and Canada, too, came overnight. It was very instant. We have to think what to do and there were a lot of challenges. Some of them were already mentioned in the introduction in the opening of the conference. It was, for example, renew items or renewing patron account expiration, which was excellent. Because we could use the feature of emergency closing. It was so smooth, so good, thank you very much to all who have been working on it. Because it was very useful. In our library, we felt we wanted to send books by email because we have a lot of students need to continue their studies. They need to write their essays, things like that. We decided we will send them book, they would order the book by catalog. But then we have to solve some problem connected with this because we had to distinguish other students have placed hold and want to take the book after the

quarantine has finished. Or, whether he or she wanted to send the book by email. The problem was also that some students have stayed at parents or any other place, and it was [indiscernible] they did not have in the Evergreen account. This was something we have to do. We missed [sounds like] some option to order something books by post by placing the old. But then we decided to incorporate some form to please holds results page and students can add optional address and so on. We decided to do it like this. I think I won't peak longer because I would like to hear about experiences of librarians overseas, and I would like to hear what challenges you had to face and how did you solve issues that was brought by this COVID-19 situation? Thank you for your sharing.

>> JANE SANDBERG: Thank you for that really great introduction. I know everybody has a lot to say about this topic. Can you please unmute yourself and let us know how you in your library responded to COVID-19?

>> I will just say that the emergency closing option, I don't know what we would have done without it. Or at least, there would happen and not more work on our end versus the libraries as everybody had to close.

>> At Sitka [sounds like] we also turned on the future for patron self registration and that seemed to be helpful a public libraries [sounds like]. During the introduction this morning, talking about the community outreach piece, I believe it was Terran Listed off all the things we did, she was saying patrons of check, emergency closure, turning off old notices. As she was going through the list I said check-check-check, because those are all things we did, a variety of libraries, we all did those things in different ways. Some holes are on, some are not doing any holds, at all. It's been interesting to see the variations amongst the libraries and it's been great to see how well Evergreen has handled the situation. As Jennifer said, it's made our lives easier.

>> I was going to say I would echo that. We at NC Cardinal, we kind of found that after the first week or so, we kind of figured out our sort of playbook of things we could do for

library systems. Of course we started with the emergency closing editors. One of the things we learned was it works better to do that on a branch level rather than a system-level. We tried it for the sum of our existence, it would not actually complete the process of bumping forward all of the holds dates and that sort of thing. I will post a link to a website -- or webpage, I should say -- that we ended up putting together and we ended up sending out a message to everybody that said here's the list of things that we can do for you in terms of hard boundaries, turning on or turning off,, email notices, changing the notices, updating patron accounts, some of that kind of stuff. It was a kind of a we learned over time what the different things are then sent a message to everybody and said here's our suite of options that we can help you with. Let us know what you want to do, set up a survey, and they could respond to each one of the things and say yes, I want to bump my due dates forward, I want to stop charging fines, all that sort of stuff.

>> JANE SANDBERG: One thing that our library did that was a bit challenging in Evergreen, we stopped charging fines while we were closed. But we also wanted to forgive all the existing fines, even those that had accrued before any COVID-19 closures, with the understanding that our patrons were going to be facing some economic hardships and we didn't want to be adding our library funds to those. Jason Stevenson gave me a script that got me half of the way there but it was still like a multiple day process trying to figure out how to go ahead and clear out those fines.

>> We found that a lot of our libraries are going fine-free going forward, so we had to update a lot of circulation policies, as well. It was very interesting hearing about someone who, I can't remember who it was, who created, used age protect to block all holds for 100 years. I have a sticky note here to follow up and think about that some more for future. Seems like it was a lot less work to do it that way than what we did, adjusting policies for somebody different libraries.

>> And we're not having a lot of our libraries ask for their circulation policies to be updated not just around fines, but most, well, not most, but several libraries are wanting to extend all their loan periods by week. In some cases just to give their patrons more time, but in other cases because they are checking out the items as part of processing

them for curbside. So they want to give an extra week because that may be, some of that loan period may be taken up by the time it takes the patron to come in and pick up their items.

>> BENJAMIN MURPHY: One of the other things we have found is that as library systems, we have a consortium. So not everybody started resource sharing at the same time. So we had to have a way to help people figure out which items on their pick list for libraries that were actually resource sharing. So we had to put together a sort of V-lookup in Excel to let libraries post their picklist then compare that, the pickup library, against the list of pickup libraries that were open and receiving materials so that they knew which materials to actually pick.

>> JANE SANDBERG: One thing that we found ourselves doing was we wound up distributed a lot of laptops, both from our own collection, but then also from all the other departments across campus that had some spare laptops lying around that could be used by students. And our librarians would drive across our counties delivering them to people's doorsteps. And actually cataloguing those and processing those, even though we were doing pretty minimal cataloging and processing. It still took up a bunch of time, because you still have to make your mark record for this weird laptop that you found in somebody's office.

>> We haven't had any tickets come into us on the consortium level, but I've seen through social media that a bunch of our postsecondaries are loaning out laptops to students who otherwise wouldn't have access. So I think that's probably happening across a lot of libraries right now.

>> JANE SANDBERG: Has anybody had a chance to look at the curbside pickup feature that is being proposed for Evergreen?

>> At Sitka, we have looked at the specs, what is it intended to do and how it is intended to work?

>> JANE SANDBERG: I don't really know much about it so maybe someone else would be a better person for that?

>> I know it is supposed to interact and touch as little existing infrastructure as possible, it's supposed to be on the side. So people can use it or don't have to use it, it's not going to visually affect people to not use it. That was the one major thing that I remembered from reading the specs.

>> And I think that's also, in part, so that hopefully libraries can implement without having to do any major upgrading.

>> JANE SANDBERG: I just posted a link to the launchpad bug that has some information about it into our chat.

>> And I just posted the highlight from Equinox that talks little bit about, that they posted at the beginning of the month talking about it.

>> We had a conversation earlier this afternoon when I was not actually in this conference brought in a meeting for Evergreen Indiana. They have been looking at another curbside well, it was an app that had a curbside module built into it. When they looked at the mockups that are included in the specifications, they were impressed and set that they look, at least the workflows look similar and are understandable for those things that are wanting to implement in the Public library setting. Now, how that translates to an academic setting is of course going to be a little bit different.

>> So far, I would say we haven't really have much difference in a lot of the requests that we've had for support through this between the different types of libraries that we have. I think, as Christine said, we have public, postsecondary, special, we have K-12 mix of everything in Sitka. But I wouldn't be surprised, as we head toward September, if there is going to be specific things that our different library types are looking at,

especially around postsecondaries and the potential to have to be doing a lot more mailing of items. I should probably include as part of that but most, I think potentially all libraries, all postsecondaries in British Columbia have already announced that September is going to be almost purely online semesters for them.

>> Look at you guys being proactive and things.

>> JANE SANDBERG: Are any of your academic libraries for other folks on the calls going to be open this fall? Okay, I am not hearing any responses there. One more question. Then, I think we can move on to the next topic. I really interested to know what things you started doing during COVID-19 that you plan to take forward even after the quarantine and the pandemic are over? Or, more over.

>> We have decided to continue sending books by post, because we think this could be very useful for our distant program students or for people that are, that have some health problems or students with special needs and so on. So we have invented how to do it. Now we will continue, we would never think about it, I think, without COVID. So at least something good.

>> One thing I think that we are planning to keep is the option for libraries to have the patron self registration, because that is not a feature we had used in Evergreen for any of our libraries, previously. And that will be something that libraries can now choose whether they want to use.

>> Our libraries have been using it, it is updated by library, with the current situation, people are wishing there is an option to create a card, to create a record so that people could start using it before without waiting for staff to come through and do some processing on those. So that they can it into the electronic resources.

>> We have heard that, too.

>> We've had libraries come from TLC, and that is a feature available in TLC. So we have heard that, as well. In number of our libraries who did not previously much use of the self registration option are using it now to allow patrons to have access to the electronic resources and I expect that at least some of them will continue to do that.

>> One thing that possibly we just haven't had the time to investigate far enough into, but, does anybody know if it's possible to get stats on Pending Patrons? Like, how many were created? Because that's not something we've found yet. There doesn't appear to be a way to tell if a patron account once it's fully created, originated as a pending self registration.

>> Yeah, I don't think we have any statistics on that. The way our libraries raising a currently is the patron fills something out. The staffing creates the record, seeing if the patient already has a card, which is often the case, and emails the information to the patron and has a short, a permission group that expires in, right now it is two months, but it is normally shorter than that, so that the patron has to come in and present their identification. It's a policy more than technology that is making this a more cumbersome process for patrons who just want to use the electronic resources. But we'd like to streamline that more.

>> I was intrigued by I think what Andrea said during the opening remarks about the library or consortium who figured out how to get the barcode into the welcome email.

>> JANE SANDBERG: There is definitely a lot of really interesting stuff going on. I'm going to cut this discussion short and quickly moved to the last topic on the agenda, which is the course reserves module or the course materials module. This is a project that NOBLE, Treasure County Community College and Linn Benton start working on. It started out really fast and we got a lot of great stuff working and then COVID-19 hit and now things are going a lot slower. But fortunately, that's starting to pick back up, again. I wanted to give you a quick little prerecorded demo of what that is looking like right now. So, I will just start sharing my screen again.

So one thing that we really wanted was you don't have to do like 500,000 different settings just to get started, just to try it out. That's one of the things about the Acquisitions module, for example, that you have to do all these different settings before you can even start using it. For this course materials module, you just go to the library settings editor, go to Course and set that to True. You can set it for specific libraries in your consortium, or you can have a whole system or a whole consortium to using it. What this does is it gives you access to this course list. Which is just under local administration. And you can go ahead and edit existing courses, you can archive them. Then, you can add your materials to the course. Here's just an example of throwing a barcode on their back and you can say whether it's required, optional, what have you. You can set temporary call numbers, circulation modifier, item status, shelving location that will appear and be effective once, while the item is on reserve. Then, as soon as the item is off reserve or the course ends, it will return to the original circulation modifier, original circulation call number, etc. You can also see that here in the OPAC, it does display which course or courses a particular item is attached to. So, one other thing is you want this to go beyond a traditional course reserves module. Because we want to be able to incorporate library e-books and open educational resources, those things we know are saving students money. But are not necessarily in our catalogs ready to go and definitely don't have a barcode attached to them. One of the things that [indiscernible] who is doing the development for this is currently working on is getting those non-catalog items so that you can add them to courses. Which, fast-forward a little bit, it allows patrons to go to the OPAC and search by instructor, their course number, their course title. I think a lot of us who have done public services will know about those students who say I need the textbook for my class, but I don't really remember the name of my professor or the name of the course or the number of the course. So as long as you have at least some of that information, this search fraction will be able to help out. There's also going to be a browse function for students really don't do any of that information and just need to browse all the biology courses. It's going to be integrated both into the classic OPAC and the new staff catalog and I will

fast-forward a little bit here. I think that is all I have to say and that demo. What questions do you have, really quickly?

>> That looks amazing, Jane!

>> Can I just jump in here, this is Elizabeth from NOBLE, again. We were really excited about this. We have a long history of using course reserves with our previous system. When we moved to Evergreen we started using the Ciric [sounds like] course reserves thing which was sort of a, we're still using it, it's not, it's another open-source thing that was sort of bolted onto, rather awkwardly bolted onto Evergreen. We have been reasonably happy with that. But nobody else is really using it. So the development for that is not going anywhere. It's not really integrated into Evergreen. So we were really happy when we saw what Jane's institution and also Treasure Valley, am I getting that right?

>> JANE SANDBERG: That's correct.

>> Were doing. So we jumped in with some funding for the electronic resources. Prescient, since that is not of course what everybody may be using for a while, the other things we see in the future, we're really happy that this is happening, because now we have of course, reserves module within Evergreen that then can be improved and added to and developed. So we want to add things like terms, fall term, spring term, academic departments. Right now it's just courses and we would like a little more structure than that. We have a lot of ideas about being able to batch add items to a course, file barcodes, more course management, copy one course to another course and archive and un archive things. And be able to associate a group of patrons with a course, a group of students with a course, so that allows them to get to electronic resources or other things based on their membership in the course. So we see a lot of future development for this. But we're just so glad that we now have a long list of development for a new, truly integrated with Evergreen course reserves thing that will, we hope, develop in all the ways we want it to top. I keep thinking course reserves is

going to be over electronic resources and other thing someday with electronic resources and other things. But that is not the case for our institutions, anytime soon.

>> JANE SANDBERG: Thank you for saying that, Elizabeth. I think we had better start to clear out and make sure that we have a break before the next session which is coming up in 7 minutes. So I am going to call us done for now. But thank you so much for attending the Student Success Working Group. It was a really great conversation. I learned a bunch of things. I hope you did, too. We meet quarterly, so be on the lookout for some emails about our next meeting. Thanks, everyone.

>> Thank you, Jane.