From Pandemics to Power Outages
how Evergreen can help libraries handle closings with grace

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What we’ll talk about today

- General background info
- Case Study: Altoona
- Case Study: Parkland
- Tools you can use in Evergreen
- What you can do to plan ahead
- How to cope with the unplanned
- Planned development and bugs
- Group discussion - what worked for you?
SPARK - Consortium of Libraries in Pennsylvania
PaILS - Pennsylvania Integrated Library System
manages SPARK

Consists of 160 library locations across 28 counties with a wide range of outlet types including kiosks, bookmobiles, and multi county cooperatives.
Case Study: Altoona

- “District Center” library - home for deliveries, sorting & ILL for 13 libraries
- Massive water main break on 12/14/2020 caused the library to close with no advance notice.
- Factors that impacted ILS: limited access to facility, no power, etc

- Process:
  - SHUT IT ALL DOWN
  - Gradually bring services back up, ASAP for services like ILL and shipping that impact other libraries (as well as payroll and other mission-critical tasks)
  - Open secondary locations for various services (then tertiary locations. . .etc)
Case Study: Parkland

- Library facility is part of the South Whitehall Township complex, which had a construction project beginning in February 2020
  - Parking lots were closed and patrons had trouble accessing the facility, so the library needed to close prior to
  - They were already in negotiations for a temporary location, which they opened in late June 2020 - ‘suite side’ pickup, appointments, etc.
    - Other township offices also moved to the same office.
  - Employees worked at various locations, materials had to be driven to the library location
- Construction project was scheduled to be completed in December but was delayed . . .
  - Library was closed March and part of April 2021 to move collections back from temporary space
Case Study: Parkland

- When you can’t take everything to a temporary location, what DO you take? What do you leave behind (which means it will not be able to circulate).
  - This is something you can plan ahead for, at least to a certain extent.
- It’s important to stay in contact with your resource sharing partners & affiliated libraries - they can be an alternate pickup location, hold your returns.
- What is your after-hours return situation? Is your bookdrop lockable? Where else can patrons return books?
- How will you manage deliveries and shipping?
Evergreen can help you...gracefully close

- **Postpone Due Dates and Hold Shelf Expire Dates**
  - Emergency closing handler
- **Check In Items while Closed**
  - Check In Modifiers
    - Amnesty mode (void accruing fines)
    - Capture local holds as transits (set them aside)
- **Pause Holds and Resource Sharing**
  - Library settings to make your location NOT a Pickup location (for new holds)
  - Freeze all Holds with your location as a Pickup Location (for active holds)
  - 100 Year Age Hold Protection on all your items (for Resource Sharing)
- **Communicate with patrons**
  - OPAC maintenance messages
  - Create a new email notice to target the postponed due date and share status updates
  - Turn off or edit current notices (especially Lost)
- **Divert your patrons to another location or partner library**
  - Rescope your OPAC to another location temporarily
  - Make your location Not OPAC visible
Evergreen can help you... gracefully operate while closed

Check In Items while Closed

- **Check In Modifiers**
  - Amnesty mode (void accruing fines)
  - Capture local holds as transits (set them aside)

Part of your collection is inaccessible?

- **Change Shelving Location properties**
  - Make holdable/not holdable
  - Make visible on the OPAC/not visible

Issue Digital Library Cards

- Set up [Patron Self Registration](#)
- Staff monitor [Pending Patrons](#)
- Welcome Email [notifies Patron](#) of new account info
- Mail or store new cards until reopen

Gradually restart Holds Management

- Decide if new Pick Up Location is necessary
- Hold Notices? Calls only or modify [Notifications & action triggers](#)
- [Clear your Holds Shelf](#) first!
- Unfreeze Holds (after changing Pick Up location)

Clearing your Hold Shelf first helps:

- Make room for new holds
- Clarify staff/patron needs before pulling new holds
- Can include contacting patron to ask:
  - Still want the item?
  - Want to pick up at another location?
  - Want to go back on the list for later?

Pull and Capture New Holds while Closed

- **Library settings** for hold targeting while closed
  - "Target copies for a hold even if copy's circ lib is closed"
  - “Target copies for a hold even if copy's circ lib is closed IF the circ lib is the hold's pickup lib"
Evergreen can help you...gracefully reopen

Temporary Location or Curbside with reduced hours?

- **Show Temp Location with Organizational Units:**
  - Rename Location
  - New Address & Phone
  - New Hours of Operation

- **Communicate with Patrons**
  - Edit or turn on/off Notifications & action triggers
  - Update OPAC maintenance messages to describe current services & their location(s)

- **Divert your patrons to your Temp Location**
  - Rescope OPAC to your location
  - Make Location OPAC Visible
  - Make Location a Pick Up Location in Library settings
  - Turn off Targeting Holds while Closed in Library settings
What you can do to plan ahead

- Have a disaster response plan!
  - Include ILS info in any business-interruption planning - how can the ILS support continuity of operations and help you keep track of where your collections are?
  - Can you keep all the staff on the payroll? How can part-time employees continue to be useful while the facility is closed?

- Always plan to be closed for longer than you think
- Make sure your communication plan includes not only staff, but also stakeholders - local funders (county/state/municipality), libraries you resource share with, local groups who use the library
Library Closure Kits

What does a library need to operate in another location on short notice?

Does each department need their own kit?

<table>
<thead>
<tr>
<th></th>
<th>All Staff</th>
<th>Department Heads</th>
<th>Use and Content Ideas</th>
</tr>
</thead>
</table>
| 1 | Pocket Response Plan (PReP)  
   Staff Phone Tree | ✔️ | • Tells staff on Front Lines who to Call and When  
• Accessible Size for Wallet or ID Badge Holder  
• Quick Action Plans to escalate Short to Long Term Emergencies  
• Provides procedure for times when Dept. Heads are not present |
| 2 | In Depth Disaster Plan  
   Vendor Contacts  
   Utility/Services Contacts | ✔️ | • In Depth Plan for Long Term Emergencies  
• Vendors & Services redirected or paused  
• Staffing & Pay Guidance for Long Term Closures  
• Guidance on Preserving Damaged Collections |
| 3 | Administration Kit | As Assigned | • Library Workstation (Laptop, etc.)  
• Payroll & Finances Supplies  
• Library Issued Phone  
• Instructions for Library Phone Recording Change/Forwarding |
| 4 | Circulation Kit | As Assigned | • Library Workstation (Laptop, etc.)  
• Library Card Supplies  
• Mailing/Shipping Supplies  
• Library Issued Phone |
| 5 | Cataloging | As Assigned | • Library Workstation (Laptop, etc.)  
• Cataloging Supplies (Barcodes, Book covers, Tape, etc.)  
• Sheet Labels Compatible with Standard Printer  
• Library Issued Phone |
How to cope with the unplanned

Finding silver linings

- Partial closure? Inventory!
- Temporary location? New partnerships!
- Library closed? Work on maintenance backlog!
- Cleaning out spaces? Weed all the things!
- Turns out your employees are pretty great!
Please, sir, I want some more...HEAT!

❖ **Launchpad Bugs related to Placing Holds**
  ➢ #1909147 [OPAC: Place hold fails silently if no pickup location selected](#)
  ➢ #1477154 [Placing holds fails unintuitively when preferred pickup location is disabled via org unit setting opac.holds.org_unit_not_pickup_lib](#)
  ➢ #1740147 [Wishlist: Provide functionality to bypass capturing for a hold pickup location when the org unit is closed](#)
  ➢ #1866667 [Hold pickup lib change - Retargeting excludes current (best?) copy](#)
  ➢ #1747415 [Org Unit is not a hold pickup library still allows selection as Preferred pickup location](#)

❖ **Launchpad Bugs related to the Emergency Closing Handler**
  ➢ #1879789 [Emergency Closing Handler does not consistently process immediately to all Children Libraries](#)
  ➢ #1867665 [Emergency closure handler doesn’t send out emails to affected patrons](#)
  ➢ #1818917 [Emergency Closing Handler Should Adjust "All" Associated Fines](#)
  ➢ #1818912 [Single Day Emergency Closings Fail to Update Due Dates Correctly](#)
  ➢ #1873098 [Applying a Retroactive Emergency Closing Causes Issues with Returned Items](#)
  ➢ #1867770 [Emergency Closing Handler Should Push Back Patron Expirations](#)
  ➢ #1867779 [Emergency Closing Handler Should reference the Default Hold shelf expire interval](#)
  ➢ #1867789 [Emergency Closing Handler Should Push Back Hold Expirations](#)
  ➢ #1869728 [Emergency closure processing fails if overlap existing closed date](#)
Group Discussion - What worked for you? (or not!)