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
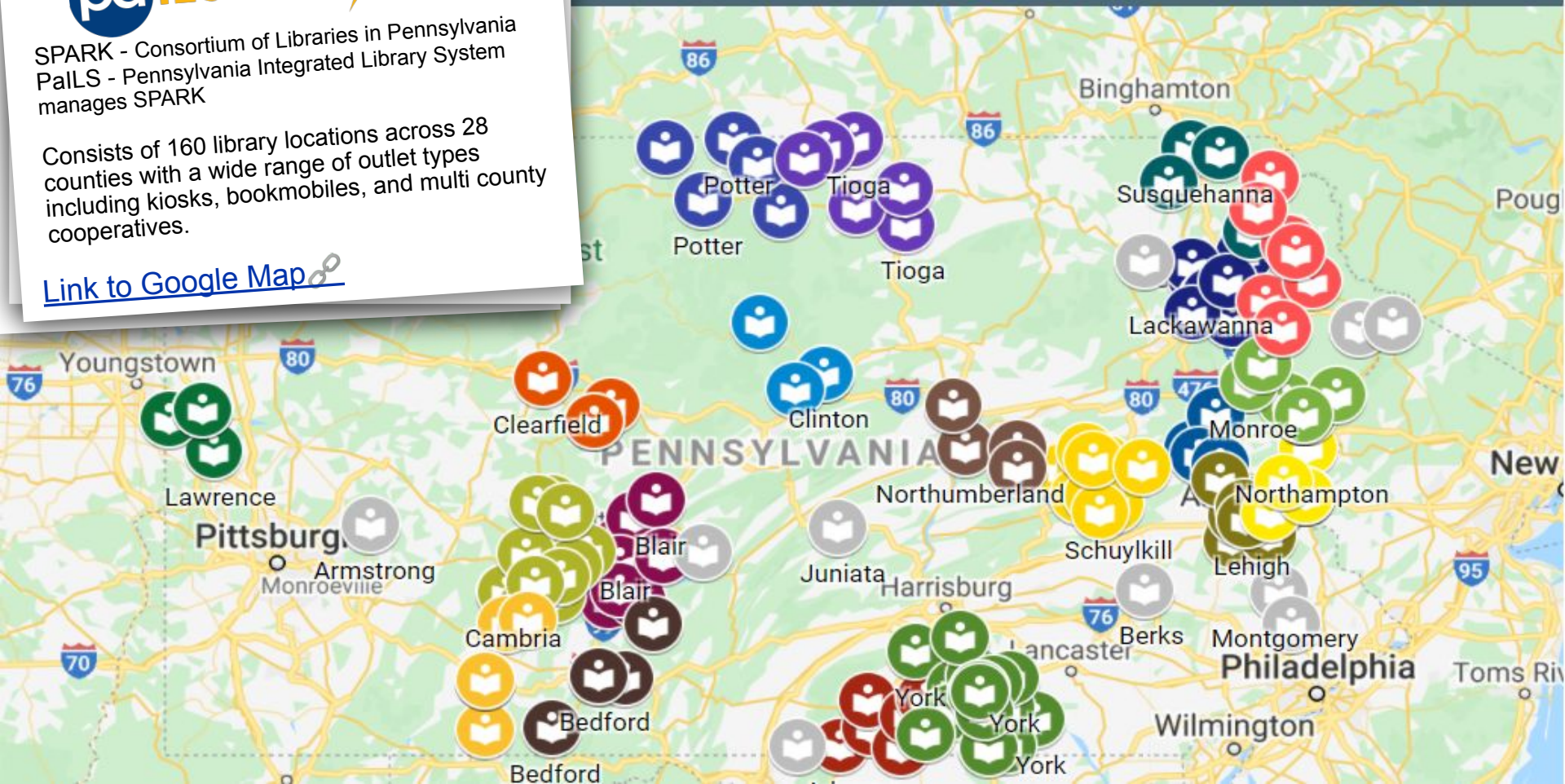- Group discussion - what worked for you?

paILS | SP**A**RK

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.

Link to Google Map🔗

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
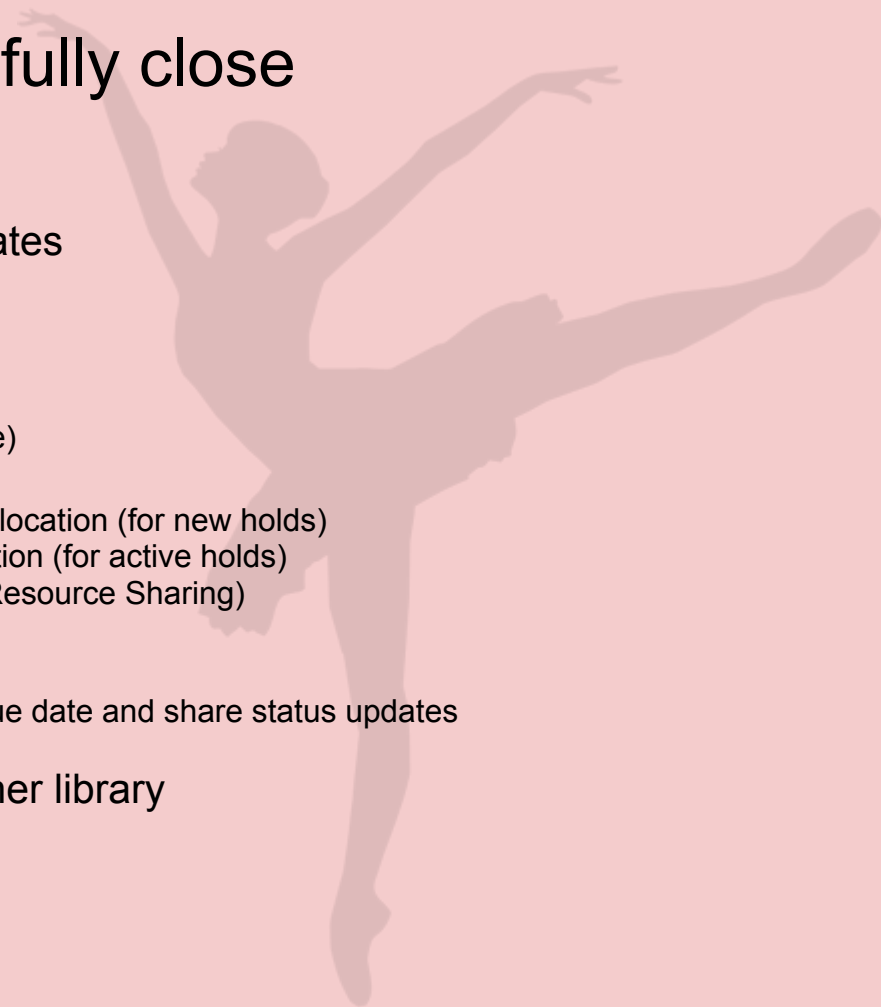
Evergreen can help you… gracefully operate while closed

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](#)
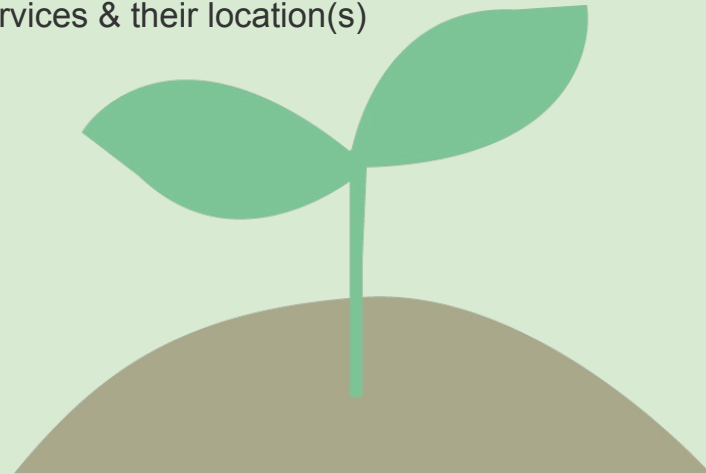
What you can do to plan ahead

- 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?

		All Staff	Department Heads	Use and Content Ideas
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!)