

Resource Sharing Workflows Work Group
September 5, 2024, 1 pm
Video conference

Meeting Documents: <https://www.scls.info/committees/resource-sharing-workgroup>

Join Zoom Meeting

<https://us02web.zoom.us/j/89259572785?pwd=0tM3jFJsHWT2g3PdNZ8Niv1HzwEuB4.1>

Present: Roxanne Staveness (RIO; Cluster 2), Nathan Rybarczyk (BAR; Cluster 5), Claire Parrish (MCM; Cluster 6), Jan Holmes (SUN; Cluster 7), Elizabeth Clauss (CSP; Cluster 8), Phil Hansen (FCH; Cluster 8), Margie Navarre Saaf (MPL; Clusters 11-13)

Not Present: Wendy Rawson (FCH; Cluster 8), Todd Cox (DCL; Clusters 9-10), Tim Drexler (SCLS), Heidi Oliversen Cindy Weber (SCLS), Doug Wilson (SCLS)

Recorder: Vicki Teal Lovely (SCLS)

SCLS Staff Present: Corey Baumann (SCLS)

1. Call to Order 1:02 pm

2. Approval of previous meeting minutes: 8/1/2024

- a. Motion: E. Clauss moved approval of the August meeting minutes. J. Holmes seconded.
- b. Discussion: None.
- c. Vote: motion carried.

3. Action Items

4. Discussion

- a. Using Transit Slips for Routing Holds
 - i. Concept:
 1. Libraries would print transit slips when trapping a hold for transit to another library. The transit slips would have the agency code of the library receiving the hold in caps at the top. This would be placed in the item for delivery, in lieu of the post it currently used. The transit slip would also include the patron ID and item barcode (at a minimum).

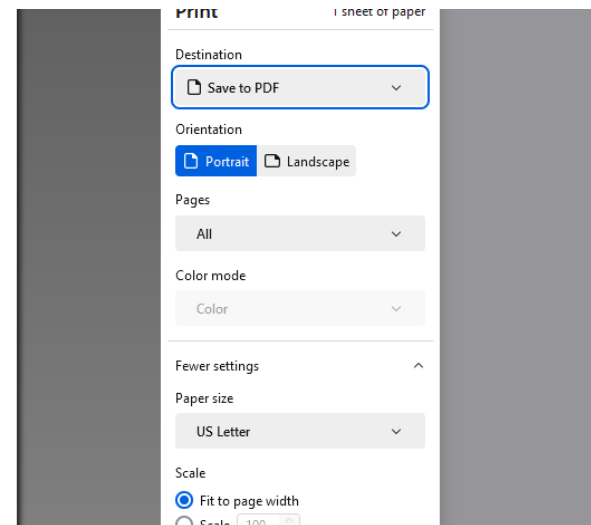
2. The transit slip could serve as a holds slip at the receiving library, with the addition of at least the first 4 letters of the patron's last name and the first 3 letters of the patron's first name.
3. An example of a prototype (created by Heidi Oliveresen and Sue Ann Kucher is below)

ii.

STO

ODIN... ,
THO...

Patron number:1300014
Item barcode:39078068243907



iii.

Improvements:

1. Only the agency code needs to stick out (less than an inch is optimum)
2. The space between the agency code and patron name is so that you could pull the slip down and the name is on the bottom (BAR and SUN do this). FCH puts the slip on the top, but could change.
3. Would want the name info to be at least the same size and font as on the current slips.
4. Include middle initial (MAD & SUN)
5. Perhaps try to reduce the space between agency and patron info to shorten the receipts and waste less paper.
6. We can revise this template and people can try it out in the sandbox in the next month.

iv. Considerations:

1. If libraries wish to use the Transit slip for holds, they will have to agree on the default information on the slip.
2. If hold expiration date is printed, it will not be accurate by the time it is checked in at the receiving library, so it would not make sense to print it on the receipt.

- a. MPL does print the held through date (AKA hold shelf expiration date). This would be an adjustment. (CSP, BAR second this.) It is used to double-check the holds lapsed report.
3. Libraries not wishing to use the default, can print a new holds receipt when checking in the hold.
 - a. As of right now, the patron info is so far down the slip, that the slip would need to be reprinted.
 - b. The font for patron info is too small.
 - c. BAR, CSP, FCH, MAD, MCM use the hold shelf expiration date. (RIO does not). SUN probably uses it.
 - d. There is more paper used when the slip is used for both holds and transit.
4. A suggestion is to use these just for transit, and not holds. Otherwise there is too much paper being used. There was some general support for this.
- v. Potential pilot:
 1. Will need to unhide transit receipt button for all libraries, not just pilot libraries. The transit receipt button is the same as the holds receipt button. There are no extra clicks involved, but staff may accidentally print transit receipts.
 2. Will need to let all libraries know that they will be receiving items from pilot libraries with the transit slips rather than yellow post-its. The receiving libraries are another opportunity for feedback. During the pilot, there will only be a few holds with the slips and most will still be post-its.
 3. Goal of pilot: gather data on the following
 - a. Time-savings for libraries
 - b. Cost of receipt for transit slips vs. post-it notes
 - c. Impact on Delivery
 - i. Q. Would this be a problem for Delivery, or would it be an adjustment? Corey replied that it would probably be an adjustment. They have something similar to this for intersystem delivery. They would want something bold, which it is. The yellow post-its are unmistakable, but sometimes there are issues with penmanship, etc. The printed transit slip removes that issue.

- ii. How do these go into a bin? It would be helpful if they are all in the same direction.
 - iii. If they go in the bin, do they get crinkled or rolled under. Do they get flipped around? A test could show this.
 - iv. If this is a major time saver, we should consider it.
 - v. It would be vetted by Delivery staff.
 - d. Work through the receipt templates prior to a pilot. This can be done between now and the next meeting. SCLS can make the adjustments suggested in 4, a, iii (Improvements) above.
 - e. Volunteers for pilot:
 - i. BAR (willing to try to use the slip for holds as well)
 - ii. Delivery is in favor of a pilot. BAR is a good-sized library. They would know which bins have the transit slips. Could they put a sticker on the bins indicating they are pilot items?
 - iii. FCH, MPL willing as well

5. Plan for Next meeting: October 3, 2024

- a. Review testing of the templates in the sandbox
- b. Plan for a (potential) pilot
- c. Possibly discuss the concept of a manifest that would be available with a central sorter (or possibly with library sorters)

6. Adjournment

For more information about the Resource Sharing Workflows Work Group, contact Vicki Teal Lovely

Resource Sharing Workflows Work Group/Notes/09-2024