**Polaris Circulation Forum**

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Thank you to Amy Emery for taking notes!!!

A moderator-led Q & A open discussion, among Polaris users, on all aspects of circulation, holds, staff functions and customer service

Q: If your library has gone fine-free, what adjustments did you make? How do you encourage folks to return items?

* After a year, patrons can’t return items.
* Initially an increase in the number of overdue items and in the number of patrons with overdue items. But time to fill holds hasn’t increased, and numbers have started to level off.
* Drop in revenue worth it for goodwill.
* Contracted with Polaris to remove all overdue fines and add transaction notes.
* Bills sent at 21 days.
* Patrons blocked from checkout once owe over $25.
* Lease credit card terminals through Envisionware to save money.
* Staff time not spent dealing with patrons at desk repaying fines is a savings.
* Staff are happy!
* With automatic renewal, revenue dropped $100,000 to $30,000.
* Patrons still have to pay for damaged and lost materials.
* Started auto-renewal when went fine-free, but complaints about auto-renewal because patrons liked to manually renew after the 7-day grace period.
* Couldn’t write off existing fines when went fine-free, so set max fines to high threshold to not block patrons; manually blocked patrons who only had replacement fee charges.
* Self-checks don’t allow patrons to do itemized payments, so some may end up paying old fines instead of replacement charges; need patrons to pay online to select which fees to pay.
* Fine free since 1978!

Q: Has your library done away with security gates? Experiences or responses?

* Silence, no one ever complained
* Gates were failing and were too expensive to replace
* Patrons complained library didn’t care about materials
* Gates keep honest people honest, but don’t really stop the dishonest folks
* Seems to be trend toward not having gates
* Cheaper to replace stolen material then to replace or maintain gates
* Reduce “us vs. them mentality”; the “we don’t trust you” relationship
* Some complaints, but most patrons haven’t noticed
* Used for door count, but wasn’t always that accurate
* Replacing door counters with thermal door counters; can now see much more accurately what peak times are, how many program attendees, did they stay in library after program
* Libraries haven’t reported that their theft rates have gone up
* DVD theft occurs even with security gates
* Don’t currently do a regular inventory, so can’t say if items stolen or misshelved
* Cost of doing business
* Do inventory of high circ items
* When had gates, the honest people stopped at alarm, while others didn’t; wasn’t a deterrent
* Consider return on investment: spending how much on security and gates to prevent how much in theft
* Goodwill for patrons; easier on front line staff; not creating a barrier
* Guardians of our materials vs. providing access to our resources; shift in mentality
* Loss of materials overall not any different without gates and children’s fines
* All materials have a shelf life anyway; should factor this in when items lost
* Vast majority of patrons intend to check out, but mistakes happen at self-checks
* Library in urban location with theft problem feels gates are important for responsibility to taxpayers, otherwise items tend to circ once and gone
* Security gates still there, but are not plugged in; use as counter and keep some materials, i.e. videogames, behind desk
* Security gates didn’t work, so removed them and moved materials behind counter; keep empty cases on shelves to swap out for high demand items
* Depends on community
* Have gates, but have lost more materials to theft with patrons checking out with different IDs and cards/card fraud, than materials walking out the door
* Gates haven’t helped deter graphic novel theft, 3M tags torn out of materials; use video cameras

Q: Our library is considering adding photos to registration. Any experiences to share?

* Easy to take photos through Leap with Web browser and web camera
* Photos helpful because didn’t require IDs
* Didn’t find photos effective as physical appearance can change a lot
* What is the ultimate objective?
* Can use pictures to alert staff of problem patrons if incident, but sometimes photos not up-to-date; invested in security cameras and pulled footage
* Let people opt out
* Took away need to provide photo ID because photo already on file
* Could not take photos of anyone under 18
* Another library did take photos of any age, because parent signature required for child card; kids come in for check out without card or ID and can verify via photo
* Some populations may feel target if photo required; opposite opinion: photos required at Costco, so what is the difference?
* Polaris added photo functionality at the request of a library in WA state (Kelly Conner)
* There isn’t any easy way to take a photo and save it to another account, i.e. if use parent photo for kid cards
* If not going to update pictures of kids, it’s not worth it

Q. What reports do you run on a regular basis to help keep data accurate?

* Materials that age to lost after certain number of days: Librarians can review to see if they want to reorder or not; update note to librarian review and replace/not replace. Same for missing items. Run monthly; helps with collection maintenance.
* Review patron record notes: Purge notes older than 5 years. Library is doing the work manually in case a note is really important to keep; if so, summarize notes to use less space.
* Run a job to remove spaces from scanned driver’s license numbers.
* Long in-transit/transferred: Send report to both libraries; if don’t find in 90 days, mark missing. Another library searches after a week, and marks missing after 2 weeks.
* Items missing with holds: If hold on only item in collection, transfer hold to ILL or replace item.

Q. My library has a problem with items being missed at check-in. The items are then shelved without being checked in. Any ideas?

* Check items in, then print out list, and have someone else check the list
* Check in a limited number of items and then double check work, i.e. every 3 or 10 items
* Have a 2nd person double check all check-ins for 2 weeks
* Run a custom report, 3 days before patrons are billed for items and check the shelves before bills sent
* When people are checking in, make sure that is their only task, so they’re not distracted
* Use a “one day without injury” type of sign as incentive
* If collection is RFID tagged, use RFID inventory wand to scan shelves and alert for items that are not in the correct status. After taking care of those items, run a report of items not found (Polaris Inventory Manager: Expected items not processed) and look for them. Work in sections or collection codes, instead of entire library collection. Pair inventory and weeding instead of having to go through entire collection twice.

Additional discussion:

* Library discovered patrons were using self-check to get around renewal block due to holds: If couldn’t renew, patron was giving to someone else with a different card to get the item checked out again. Can track this activity (circ history in/out at self-check) via a SQL search. Alerted to the problem because of another patron waiting for a hold for long time. Blocked problem patron so couldn’t use self-check.
* Unable to identify bounce-back reason for texts: Idea Lab proposal to not use the carrier would cost libraries money--Polaris would have to write code to send without carrier, and libraries would have to pay license for that API. If a particular company uses more than one carrier, have to add the different SMS. Libraries recommended SocketLab, SendGrid or Data24-7 as companies which can receive and identify cause of bounce-backs.
* Some libraries still use print notices as state requires paper billing notices.