Action Item 3: Self-Service Card Renewals

# Proposal:

Proposal submitted by Kathryn Ames, Director of Athens Regional Library System:

"I would like to request that our patrons would be able to manage their own library card renewals. In the commercial marketplace, patrons are able to renew their VISA cards online. If we have any problems, we can flag the record to ensure that a person must talk to the desk first, but most renewals for cards are routine and are a nuisance for both staff and patron. It makes no sense to take up desk time simply to routinely renew a card every 2 years. This seems like an easy fix—if the card isn’t flagged, can’t an individual renew his card for another 2 years? Again, if we learn that in our transient population, someone has moved, we can flag that record to assure ourselves that we have the correct address. Athens is probably one of the more transient communities and yet we think this would save time and be a good pr move. I would like to have people able to renew at a self-service station much like our self-checks."

# Notes:

Please note that the Evergreen software does not currently have this capability. Custom development would be needed in order to implement this change in policy and procedure. If the Subcommittee votes to pursue this and the Executive Committee agrees, then it will be added to the PINES software development wish list.

In addition, the PINES Executive Committee would need to determine under what conditions online renewal should be allowed and what conditions should prevent it. Current PINES policy requires patrons to show proof of ID and address in order to renew their cards even if the accounts are in good order, so the Executive Committee would need to determine if that policy should change or if credentials would need to be provided in some other way.

# Survey Results:

The following summary is based on survey results from 49 PINES Subcommittees and Directors representing 31 library systems. Some additional comments were emailed after voting took place and added to the comments below.

**Responses from Subcommittee Members:**

|  |  |  |
| --- | --- | --- |
| Should patrons be allowed to renew their library cards online? | **Responses** | **Percentage** |
| Yes | 15 | 55% |
| No | 12 | 26% |
| Undecided | 1 | 19% |

**Responses from Directors who are not Subcommittee Members:**

|  |  |  |
| --- | --- | --- |
| Should patrons be allowed to renew their library cards online? | **Responses** | **Percentage** |
| Yes | 14 | 67% |
| No | 7 | 33% |
| Undecided | 0 | 0% |

# Comments:

**Comments From People Against the Change:**

* a. Not it would have to be a custom development and cost money. b. Not everyone is honest---need good address and phone number.
* A good example of why not to let patrons update their own accounts from home is the fact that library staff and local admin can't even update our own staff. A helpdesk ticket to PINES is required.  We trust the public more than our own staff to get their information correct?...... I have a real problem with that. No one has mentioned letting staff update their own with this suggested change.
* Actually, we prefer to do the renewals ourselves. Besides verifying the current address, we catch *so many* mistakes – missing information (especially with children’s cards, no parent ID), as well as typos and transposed names, phone numbers in the wrong space, patrons with more than one card, etc.
* From the standpoint of our library in Forsyth, proposal one would not be advantageous in my opinion. It seems to me that flagging patrons and writing the notes on them would be more time consuming.
* I believe that this would pose more of a problem than a solution. The proposal in itself touches on one of the problems associated with this change; the assurance of a current and correct address for the patron. Part of the reason cards have a two year renewal is so that the patron's account has the most up-to-date contact information. Therefore I would advise against this action at this time.
* If the purpose of 2 year expiration is to "force" staff to update patron information every 2 years, how can we do that if patron renews online? Also, given lack of development money - i vote NO for now.
* It is against PINES policy to renew their card before they pay their fines.
* It would require development----thus money that PINES doesn’t have. Is it really the most needed item for development? There are probably other items on that “development wish list” that are more needed and more important than this item .What real advantage does it have ---a few minutes of staff’s time to update three things---phone, address, and e-mail?  We will see how it turns out and we will do whatever the executive board decides on
* My thoughts are that the first proposed change of allowing patrons to self-renew cards is a no go. In other words, I don’t agree. Most of the time this is when we can have the patron pay any outstanding fines as well as update information and yes we could flag their cards but that puts them right back at the front desk taking up time again while the self-service kiosk sits unused. I have patrons come in all the time who didn’t even know that their card was expired. This gives us a chance to update, collect fines and inform our patronage of “new” policies. And where would the expense for the “self-service stations” come from? Who would be explaining how to use these self-service stations? The same staff that were trying to save time from having to do renewals would have to take time instead to explain it to patrons who were confused by the stations or just flat out didn’t want to do it themselves. Not to mention that some of the patrons are not always honest and given the opportunity would enter false information. Not that they wouldn’t do the same thing face to face but at least there we can require proof in the form of ID and use our human judgment when something doesn’t seem quite right.
* Staff are not able to update their own accounts why should we let patrons?
* The credit card companies have other resources to track people down and update their contact information. Not all the public libraries do. Private sector also has more money to spend on software development - is this how we want to spend our meager funds? How hard is it to have a little face time with the staff every 2 years in exchange for such a wonderful service? Most of our renewals don't seem routine. I always seem to add or correct some piece of information. But maybe that's just us.
* There are too many times when we catch a problem with an account that we were unaware of simply because the patron has to come to the desk to renew their card. Next, though someone may be able to renew their VISA card online, you generally can't do that without already having received your new card. If by chance you have moved or don't get your new VISA card, you can't very easily renew it. Thus VISA has a stop-gap measure in place to detect problems--not all problems, but many. Unless I'm missing something, I don't see that this new process provides any type of stop-gap measure, and that is of concern to me. I might be able to be persuaded if something like that could be worked out. And lastly, we are told that this will require development funds to create. Right now there are several things that are on the PINES development waiting-list that seem like a higher priority.
* This is a great option, but more critical software development should come before this convenience!
* To maintain the integrity of the database I feel this should remain in the hands of Library staff. It does not take a tremendous amount of time to do this for patrons so I think we should continue to do this.
* Unlike other services that offer an online renewal option (GA drivers license--once a driver has a "secure" license, Georgia Librarian licenses, etc.), library cards inherently create the potential for liability. Every account we create/card we issue has the potential to incur serious bills resulting from lost/damaged materials in addition to over dues. While one never has the opportunity to incur a debt to the DDS by operating their car nor the opportunity to incur a debt to the Secretary of State's office by practicing their profession, a patron does have the opportunity to incur a debt merely by using their library account to check out materials. In order to make the recovery of library materials (and charges) efficient and practical, due diligence needs to be exercised by library staff to ensure that the person presenting a library card for an expired account is, in fact, the account holder and that their account information is up-to-date.

**Comments From People In Favor of the Change:**

* As far as patron renewals…we are able to get our “challenging” patrons by requiring they come in for their card renewals and cleaning up their account.  I don’t have a problem with “responsible” patrons renewing their own cards.  We just need to make sure a good consistent system is in place for flagging problem cards for patrons in the PINES system.
* As long as the patron's card is clear, it might be easier to let patrons renew their cards online.
* As long as there are no issues with the card. You will need to make sure that Evergreen recognizes cards that have accompanying registration fees-such as out of state fees and not allow renewal of those accounts. Those patrons should still come into the library to renew and pay their yearly fee. Also...Make sure that it is etched in stone that the patron should come into the library if they are unable to renew online. Otherwise, they will be calling the library to renew. I think, other than materials renewals, account changes should still never be done over the phone.
* I believe this is a good idea. It can take some staff members 15 minutes or longer to complete a card renewal. This can be very worrisome, especially during busy times, like summer or around lunchtime when we are often understaffed. Even if only some renewals could be done through online self-serve, it could still help the flow issues at the circulation desk. We also have quite a few computer-savvy patrons who are *not* amused by getting locked out of their accounts at renewal time and would certainly be capable of renewing their own card.
* I like this idea. When/if they develop this I would like something next to the contact information to ensure they confirmed the information is correct before they submit the information.
* I think our patrons would appreciate having this option. That way, when the library is closed, they can renew their card and continue with our services - such as GADD.
* I’m all for self-service. Yes.
* I would love to see this happen, but think the software mechanism would need to be pretty sophisticated- more sophisticated than most current Evergreen patron facilities. We catch a large number of phone, email, and address changes this way, as well as getting fines paid off.
* In limited circumstances. Any address changes/fines should be addressed in house with proper identification. You could always let the library system decide how to handle with their patrons.
* It does seem like a good idea to allow patrons to renew their account as long as it is in good standing - no fines, etc.
* It sounds like a nice idea, good for customer service, but this is something that Evergreen can't currently do, a development question. I think the larger question is how should we address development questions and priorities items on the wish list? In 2010, we had a development question that was passed by the Executive Committee involving Discard/Weed. How does development question compare to others? Once items are on the wish list should they be reviewed periodically? In general, how should development questions be handled?
* It would be great customer service if patrons in good standing could update their information without coming into a library. More and more patrons are remote users -- using databases or downloading books -- had have no need to come to the bricks and mortar building. We need to be able to serve this patron, and other patrons using the library when it's convenient to them, not to us. It's the checked-out information on cards that we need to protect, not their name and address, per se. Many online services offer this option, and it would be great if PINES could too.
* It would be worth investing in.
* This is a great idea as long as the account can be flagged for ID check when the patron returns to the library.
* Yes as long as they can be blocked from doing so if there are issues-fines, fees, books not returned etc.

**Comments from People Undecided on the Change:**

* I would be in favor if the software makes it very visible that they need to update their information (address, phone number, e-mail.) So many times I have helped with a renewal of a card and the staff member says, "We need to make sure we have updated information on your account." The patron says, "Everything's the same." But it isn't: after asking a couple of questions it is clear that the patron that they have forgotten that they moved or changed phone numbers in the past couple of years. Also, would this affect the motor voter requirement that the patron be asked if they need to register to vote when they renew their card?
* My staff were split on this.  Tyrone does not have a self- check station.  I don’t see that changing in the near future either.  We flag patron accounts now, if there is a question of verifying information.  If patrons are allowed to renew their accounts online, then most of us are for that.