

HENNEPIN COUNTY  
LIBRARY

# Automatic Renewal

Using DIY Technology to Create an  
Improved Patron Experience

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# Automatic Renewal

## What is automatic renewal?

- A service that automatically renews a patron's eligible items without the patron having to lift a finger.

# Automatic Renewal

## Why implement automatic renewal?

- Improved patron experience
- Assisting patrons in managing their accounts
- Reducing barriers to access by eliminating some opportunities for fines
- Eliminating difficult patron/staff conversations about late renewals

# Automatic Renewal

## Research

- Urban Libraries Council
- Connected with library systems that implemented automatic renewal
- Technical feasibility

# Automatic Renewal

We were intentional about including staff in the conversation

- Patron Experience Advisory Committee
- Library Board
- Library leadership meetings
- Online discussion: Introduce all staff to the automatic renewal concept and solicit feedback

# Automatic Renewal

- Staff Engagement Sessions (3 in-person, 1 virtual)
  - How will automatic renewal change our patrons' experience?
  - How will it be a challenge for our patrons?
  - How will it affect your job?
  - What do we need to do to move it forward?
- Established what we were hoping for and what we were worried about

# Automatic Renewal

## Development of the Implementation Team

- Volunteers from many different job classes
- Includes staff from different sized buildings, our Ask Us service, Communications, IT and Collection Management
- Members of the team brought their daily patron experiences and interactions to help inform the service design and implementation decisions

# Automatic Renewal

## How should it work?

- Only applies to the physical collection
- Piggyback on existing Due Soon service
- Keep it as simple as possible

An automatic renewal is just a renewal

Automatic renewal is attempted only once, 3 days before the item is due

An email summary is sent with the results if the patron has an email address on file

- Allow patrons to opt-out



# Automatic Renewal

## General renewal rules

- 3 renewals maximum
- No renewals if there is a waiting list
- Certain items non-renewable (Interlibrary loan, Book Club kits, etc.)
- New due date is based on the renewal date
  - ✓ For automatic renewal, the new due date is based on the old due date

# Automatic Renewal

## How was it built?

- SirsiDynix Horizon does not offer an automatic renewal feature so we had to build one
- Built using existing resources and entry-level technology

Written in Perl

Utilizes many existing Perl modules for non-entry-level things

Runs on an existing server

Has full access to Horizon

Uses an existing mail relay server for email delivery

# Automatic Renewal

## How does it work?

- Overnight, the program identifies all of the items due in 3 days
- The list of items is then sorted by patron
- One patron at a time, the program attempts to renew each of their items.
- If the patron has an email address in their record, a summary of the results is sent.

# Automatic Renewal

# Sample email

## HENNEPIN COUNTY LIBRARY

FEILMEYER, PHILIP ALAN

### Library materials due soon

The following items are due soon and could not be automatically renewed at 4:53 a.m. on October 3.

TITLE	FORMAT	DUE	CANNOT RENEW
ILL: Witchcraft for tomorrow	Book	October 6	Renewals not allowed
Officer Buckle and Gloria	Book	October 6	Waiting list
Taking care of Carruthers	Book	October 6	Waiting list
What's the matter with Carruthers?	Book	October 6	Limit reached

### Library materials renewed

The following items have been automatically renewed and have a new due date.

TITLE	FORMAT	DUE	RENEWALS LEFT
10 minutes 'til bedtime	Book	October 24	2
The body in the library	Audiobook	October 24	1

### Library materials overdue

The following item is overdue.

TITLE	FORMAT	DUE
Gregory's girl	DVD	September 16

[Log in](#) to see all items out, manage holds, and more.

For help with your account, [Ask Us](#).

This is an automatically generated email from Hennepin County Library.

# Automatic Renewal

- By default:
  - The automatic renewal service is turned on for all patrons
  - Patrons will receive a Due Soon notice if there is an email in their record
- Patrons can opt-out of either aspect of the service

Note			
Special Pickup Info			
* Exp. Date	<input type="text" value="09/15/2028"/>	Approved	Yes
		Self-Registered	No
Do NOT send Due Soon notices	<input type="checkbox"/>	Do NOT automatically renew	<input type="checkbox"/>
Regist. Date	05/17/2017	Last Updated	03/05/2018
No. of CKOs	3741	Last CKO Date	02/13/2018
		Last Authentication	03/02/2018
Hold Pickup #	831256	Unused1	

# Automatic Renewal

## What we expected

- An automatic renewal simulator was developed and ran nightly for several weeks

Renewal success 83%

Reasons for failure:

- Waiting list 78%
- Limit reached 21%
- Not allowed 1%

Email summary 78%

# Automatic Renewal

- Renewals will go UP!
  - 9,700 renewals/day (average)
  - 17,400 automatic renewals/day (simulator average)
- Number of overdue fines assessed will decrease
- Everything else was speculation
  - Lots of stakeholders wondering how it will affect their work

# Automatic Renewal

## What kind of impact will it have?

- Renewals
- Circulation
- Requests/Holds
- Collection availability
- Fines
- Overall patron experience



# Automatic Renewal

## Implementation: Go-live date of January 1<sup>st</sup>

- Staff preparation
  - Presentation to library managers and supervisors
  - Staff meetings
  - Announcement on staff website
  - Online discussion: What questions do you have?
- Patron preparation
  - No publicity before launch
  - Service announcement in the first email received after go-live

Automatic Renewal

So, what happened?

# Automatic Renewal - What happened?

## Renewals

	Jan 2017	Jan 2018	Change
Manual	280,638	89,367	-68.2%
Automatic	0	423,089	
Total	280,638	512,456	82.6%
	Feb 2017	Feb 2018	Change
Manual	280,782	52,427	-81.3%
Automatic	0	437,884	
Total	280,782	490,311	74.6%

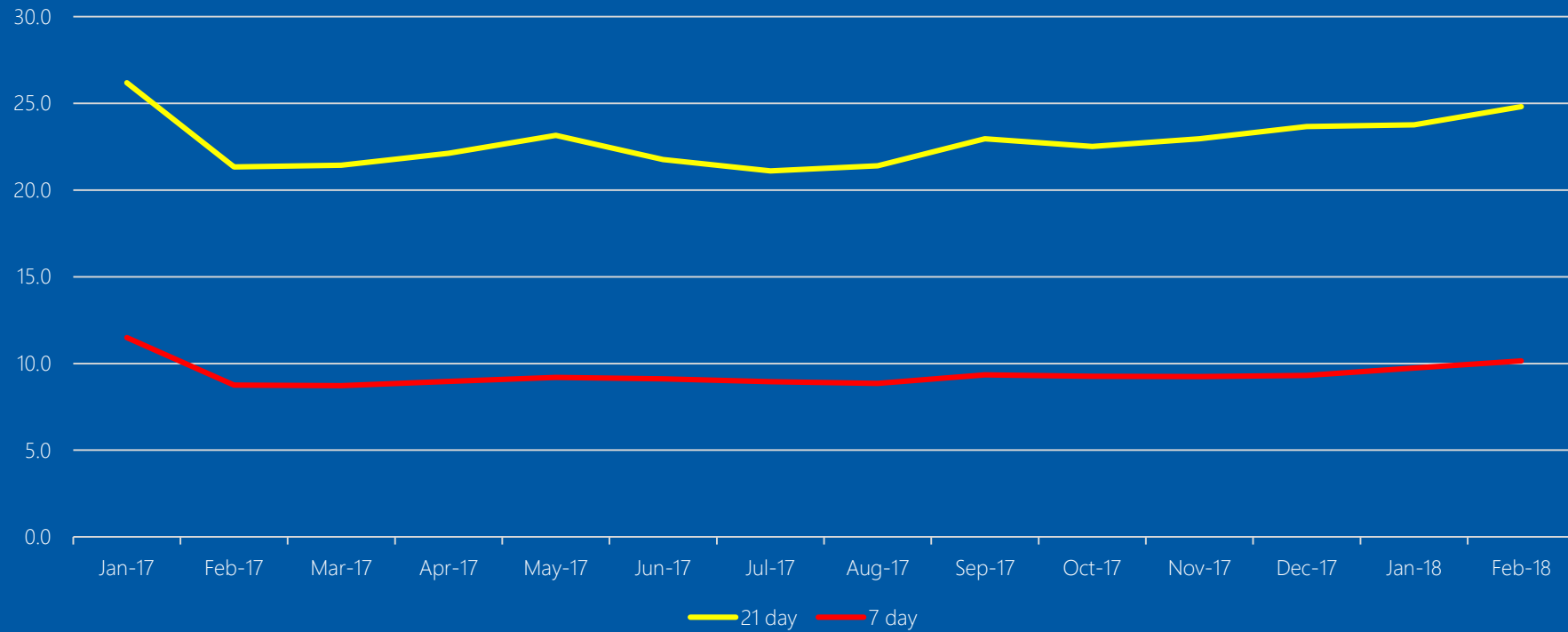
### Reported Overall Circulation

Jan 2018      Up 18%

Feb 2018      Up 13%

# Automatic Renewal - What happened?

## Circulation – Checkout duration



# Automatic Renewal - What happened?

## Circulation – First time checkouts

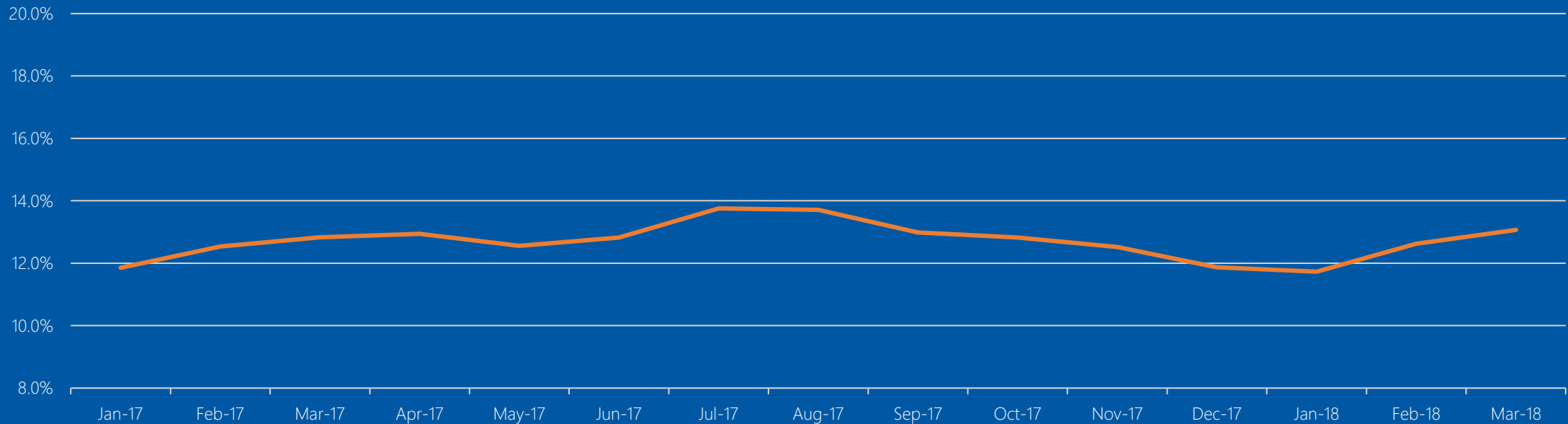
% change from previous year

2017												2018	
Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb
-4.0	-2.7	1.6	-4.3	-2.0	-4.6	-6.4	-6.0	-8.0	-5.4	-5.9	-9.0	-7.8	-13.1

# Automatic Renewal - What happened?

## Circulation – Checkout saturation

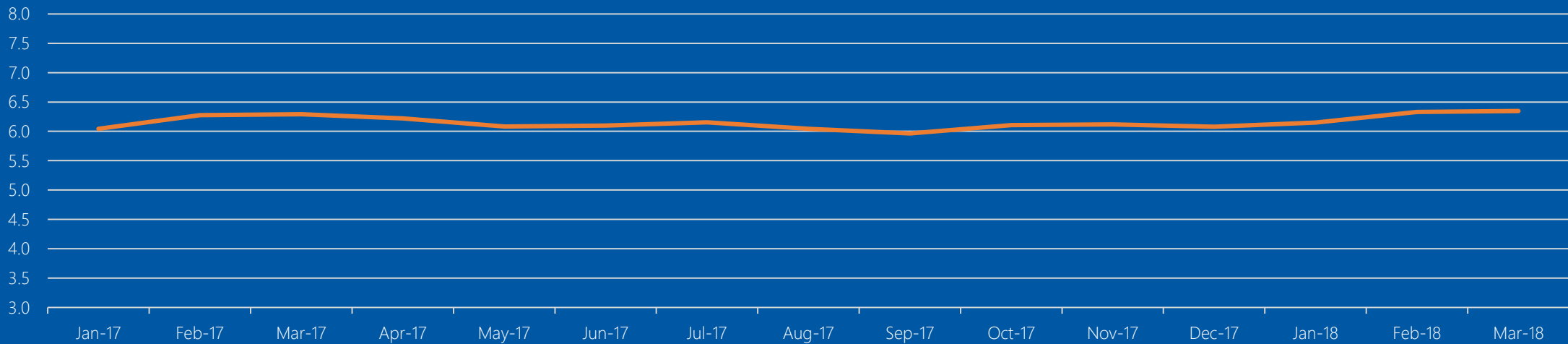
% of active patrons with 1 or more items out (monthly average)



# Automatic Renewal - What happened?

## Circulation – Checkout saturation

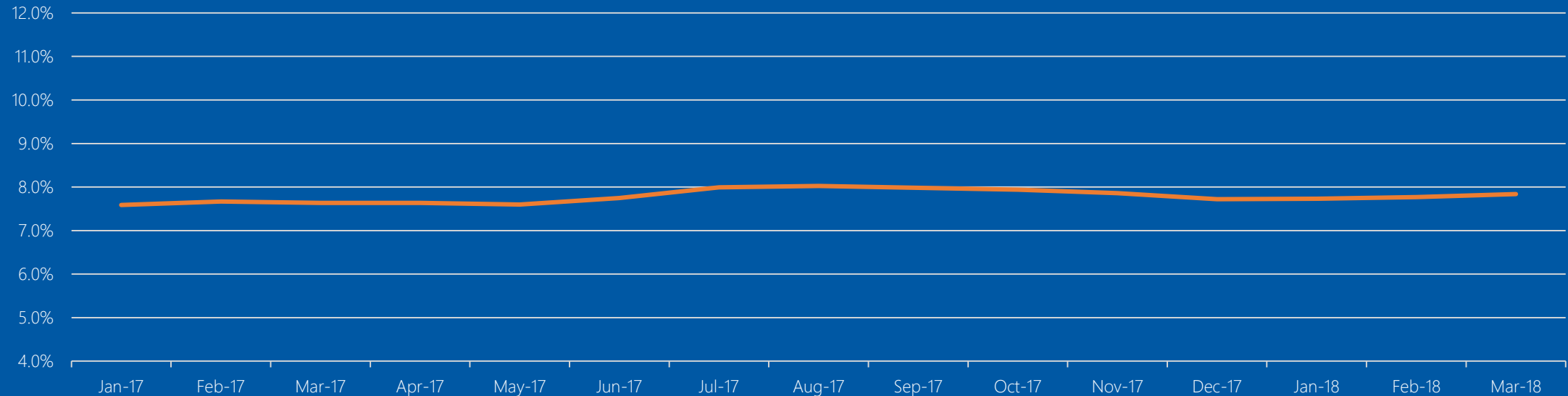
Number of items out per patron (monthly average)



# Automatic Renewal - What happened?

## Requests – Patron saturation

% of active patrons with 1 or more requests (monthly average)

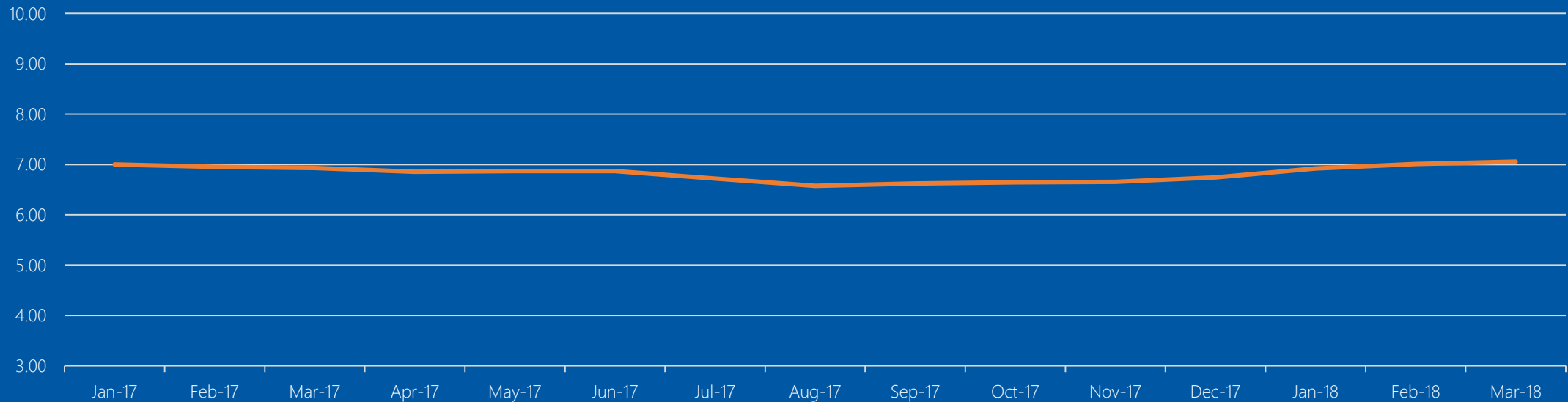




# Automatic Renewal - What happened?

## Requests – Patron saturation

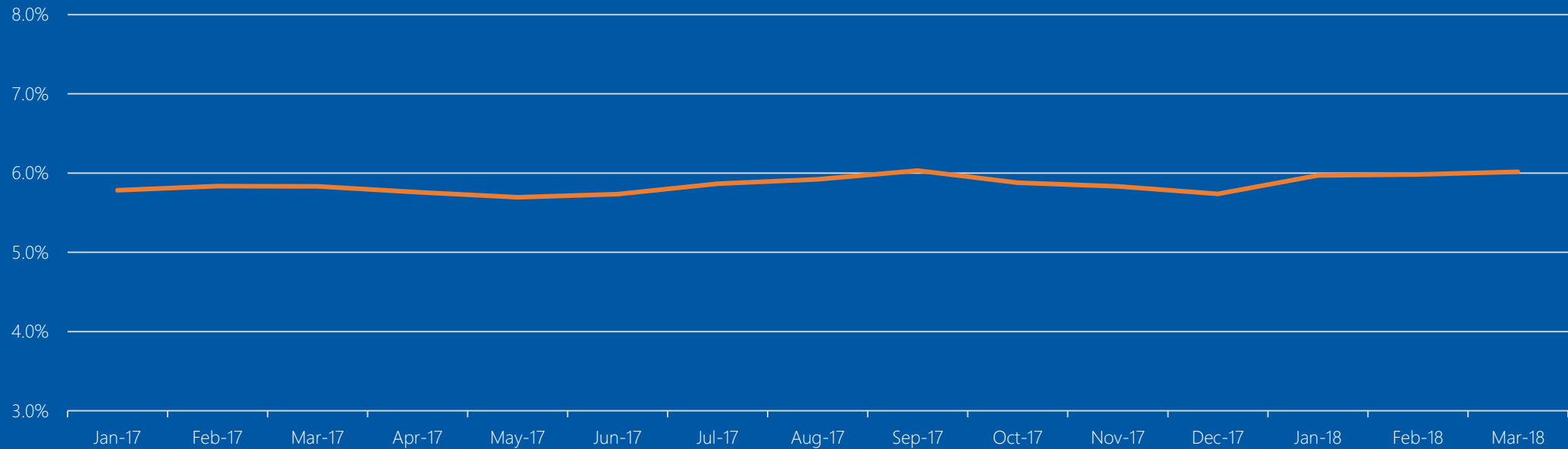
Number of requests per patron (monthly average)



# Automatic Renewal - What happened?

## Requests – Title saturation

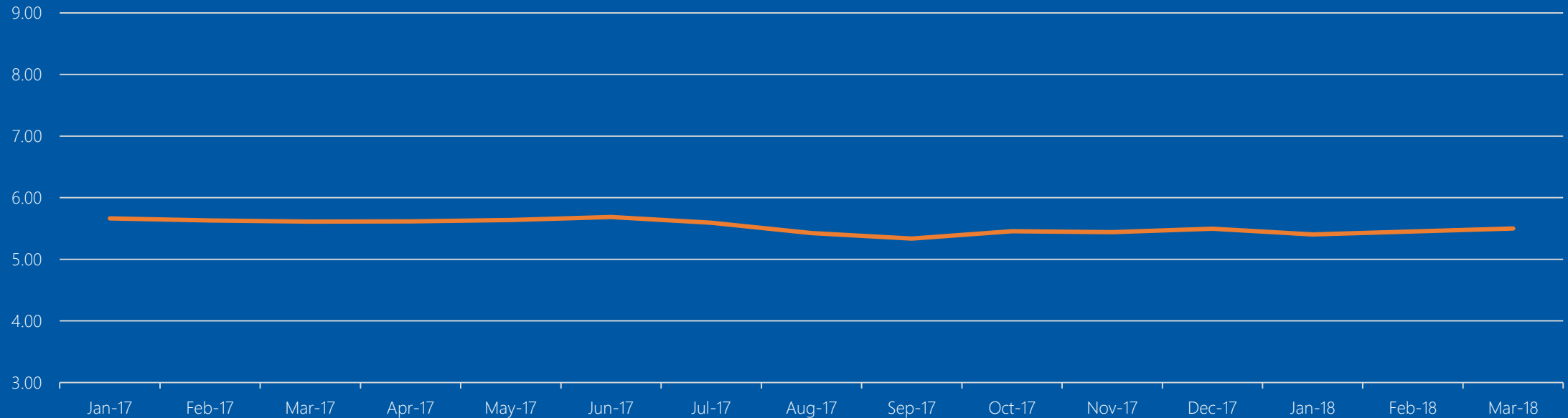
% of circulating titles with 1 or more requests (monthly average)



# Automatic Renewal - What happened?

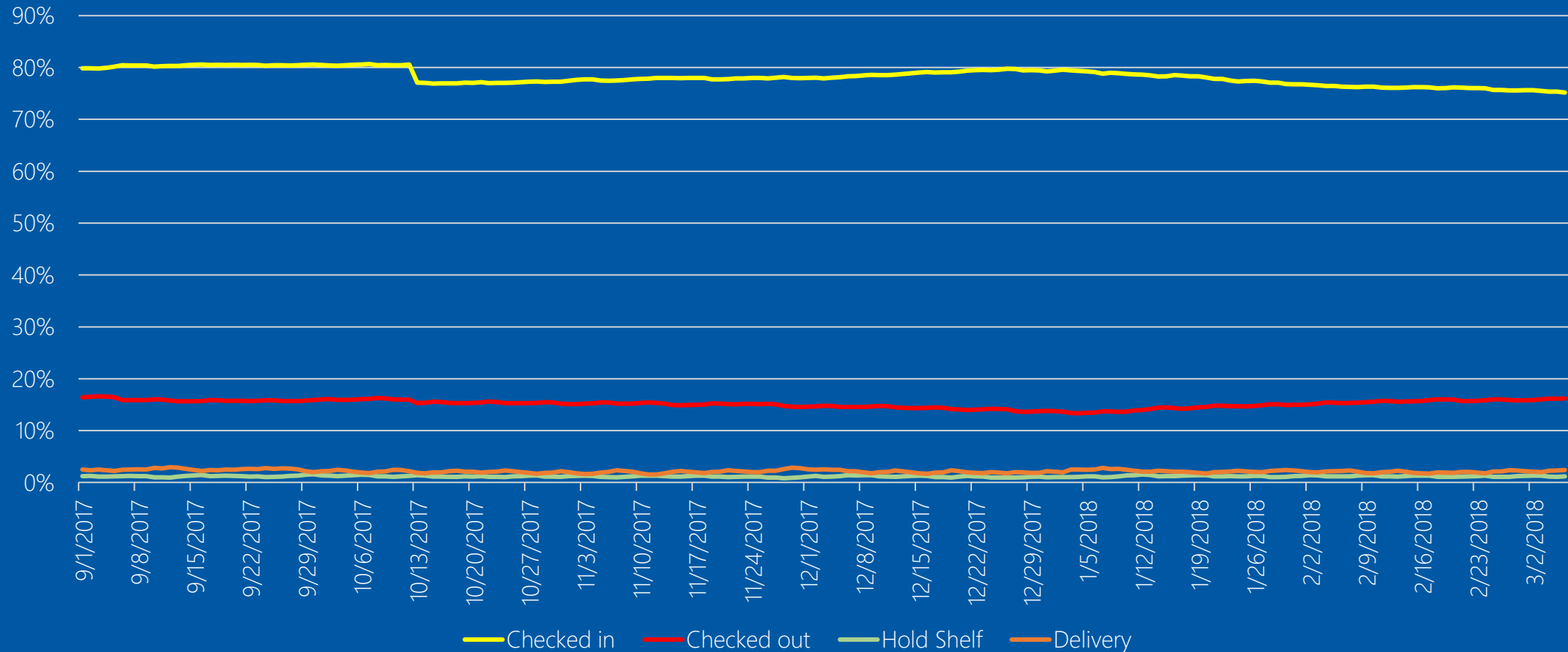
## Requests – Title saturation

Number of requests per title (monthly average)



# Automatic Renewal - What happened?

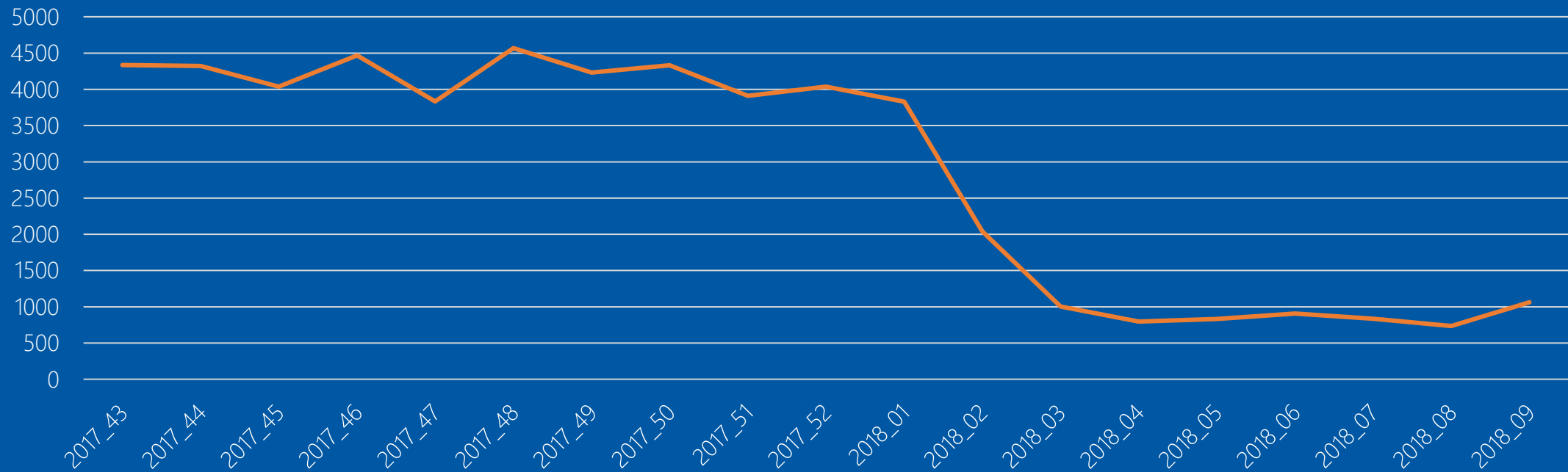
## Collection availability



# Automatic Renewal - What happened?

## Overdue Fines (weekly average)

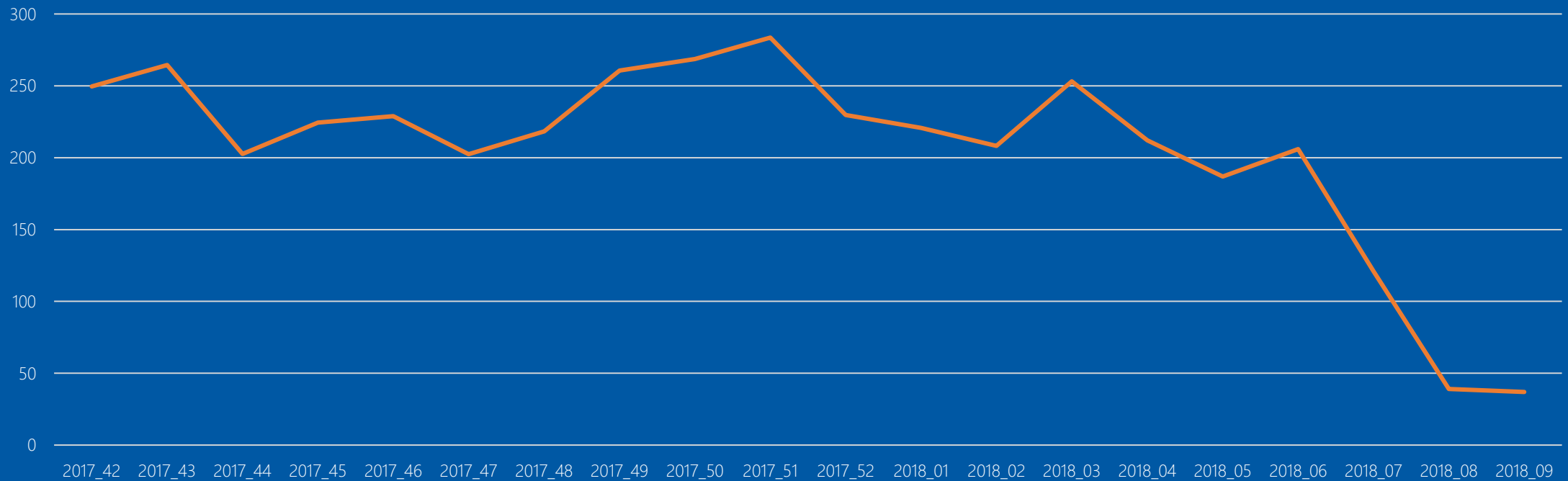
Number of fines assess



# Automatic Renewal - What happened?

## Lost material fees (weekly average)

Number of fees assessed



# Automatic Renewal - What happened?

## Patron experience

- In 10 weeks:
  - 68,000 patrons have received an email
  - Only 149 have opted out (0.2%)

## Automatic Renewal - What happened?

"Yet another reason I love our library!"

"Thanks, HCL! You're the best!"

"Love the new automatic renewal feature"

"Game Changer"

"Best news of 2018!"

"Whoa. HCL just set a new standard for its already excellent customer service"



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Questions?

Samantha Jekot-Graham, Patron Experience Lead  
Phil Feilmeyer, System Integration



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Thank you!

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