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
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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
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• 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
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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
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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
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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.
Library materials due soon
The following items are due soon and could not be automatically renewed at 4:58 a.m. on October 3.

<table>
<thead>
<tr>
<th>Title</th>
<th>Format</th>
<th>Due</th>
<th>Cannot Renew</th>
</tr>
</thead>
<tbody>
<tr>
<td>ILL: Witchcraft for tomorrow</td>
<td>Book</td>
<td>October</td>
<td>Renewals not allowed</td>
</tr>
<tr>
<td>Officer Buckle and Gloria</td>
<td>Book</td>
<td>October</td>
<td>Waiting list</td>
</tr>
<tr>
<td>Taking care of Carruthers</td>
<td>Book</td>
<td>October</td>
<td>Waiting list</td>
</tr>
<tr>
<td>What's the matter with Carruthers?</td>
<td>Book</td>
<td>October</td>
<td>Limit reached</td>
</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
<th>Title</th>
<th>Format</th>
<th>Due</th>
<th>Renewals Left</th>
</tr>
</thead>
<tbody>
<tr>
<td>10 minutes 'til bedtime</td>
<td>Book</td>
<td>October 2</td>
<td>2</td>
</tr>
<tr>
<td>The body in the library</td>
<td>Audobook</td>
<td>October 24</td>
<td>1</td>
</tr>
</tbody>
</table>

Library materials overdue
The following item is overdue.

<table>
<thead>
<tr>
<th>Title</th>
<th>Format</th>
<th>Due</th>
</tr>
</thead>
<tbody>
<tr>
<td>Gregory's girl</td>
<td>DVD</td>
<td>September 18</td>
</tr>
</tbody>
</table>
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
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 1st

• 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

<table>
<thead>
<tr>
<th></th>
<th>Jan 2017</th>
<th>Jan 2018</th>
<th>Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>Manual</td>
<td>280,638</td>
<td>89,367</td>
<td>-68.2%</td>
</tr>
<tr>
<td>Automatic</td>
<td>0</td>
<td>423,089</td>
<td></td>
</tr>
<tr>
<td>Total</td>
<td>280,638</td>
<td>512,456</td>
<td>82.6%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th></th>
<th>Feb 2017</th>
<th>Feb 2018</th>
<th>Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>Manual</td>
<td>280,782</td>
<td>52,427</td>
<td>-81.3%</td>
</tr>
<tr>
<td>Automatic</td>
<td>0</td>
<td>437,884</td>
<td></td>
</tr>
<tr>
<td>Total</td>
<td>280,782</td>
<td>490,311</td>
<td>74.6%</td>
</tr>
</tbody>
</table>

#### Reported Overall Circulation

- **Jan 2018**: Up 18%
- **Feb 2018**: Up 13%
Automatic Renewal - What happened?

Circulation – Checkout duration

- 21 day
- 7 day
Automatic Renewal - What happened?

Circulation – First time checkouts
% change from previous year

<table>
<thead>
<tr>
<th></th>
<th>2017</th>
<th>2018</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Jan</td>
<td>Feb</td>
</tr>
<tr>
<td>2017</td>
<td>-4.0</td>
<td>-2.7</td>
</tr>
<tr>
<td>2018</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Jan</td>
<td>-4.0</td>
<td>-2.7</td>
</tr>
<tr>
<td>Feb</td>
<td>1.6</td>
<td></td>
</tr>
<tr>
<td>Mar</td>
<td>-4.3</td>
<td>-4.3</td>
</tr>
<tr>
<td>Apr</td>
<td>-2.0</td>
<td>-2.0</td>
</tr>
<tr>
<td>May</td>
<td>-4.6</td>
<td>-4.6</td>
</tr>
<tr>
<td>Jun</td>
<td>-6.4</td>
<td>-6.4</td>
</tr>
<tr>
<td>Jul</td>
<td>-6.0</td>
<td>-6.0</td>
</tr>
<tr>
<td>Aug</td>
<td>-8.0</td>
<td>-8.0</td>
</tr>
<tr>
<td>Sep</td>
<td>-5.4</td>
<td>-5.4</td>
</tr>
<tr>
<td>Oct</td>
<td>-5.9</td>
<td>-5.9</td>
</tr>
<tr>
<td>Nov</td>
<td>-9.0</td>
<td>-9.0</td>
</tr>
<tr>
<td>Dec</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Jan</td>
<td>-7.8</td>
<td>-7.8</td>
</tr>
<tr>
<td>Feb</td>
<td>-13.1</td>
<td>-13.1</td>
</tr>
</tbody>
</table>
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

- Checked in
- Checked out
- Hold Shelf
- Delivery
Automatic Renewal - What happened?

Overdue Fines (weekly average)

Number of fines assessed
Automatic Renewal - What happened?

Lost material fees (weekly average)

Number of fees assessed

![Graph showing the trend of lost material fees from 2017_42 to 2018_09. The graph illustrates a decrease in fees over time.]
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”
HENNEPIN COUNTY LIBRARY

Questions?

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Thank you!

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