Self-check Working Group Report

April 1, 2014

Group Members:
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Alva Jones
Melissa Rhinehart
Cathy Griffith, ex officio
Marilyn Hanichak, chair
**Charge:**

Many libraries are relying more and more on self-check. This working group will examine how we can better utilize self-check in order to free up staff for higher level work. Recommendations should include but are not limited to:

- Visiting other libraries that use self-check; benchmarking other libraries virtually
- Rearranging the Check Out Desk to highlight self-check better (will need to coordinate w/ tech lending group)
- Examining self-check for the entertainment DVDs
- Exploring putting holds on open shelves (other academic libraries have done this)
- Training staff to encourage customers to use self-check

Recommendations by April 1, 2014 to Kathy Crowe

**Current Services:**

There are two self-check machines, both located on the first floor. One is mounted on the main check out desk. The other is approximately 20 feet from the check out desk, in the corridor between the tower elevators and building egress. Statistics show that the latter self-check is used more frequently than the one mounted on the desk (see following charts, August through November 2013). For the same time period, our total check out statistics for Jackson Library were: 87,966 initial checkouts (all desks and self-checks). Of these, 37,864 of them were DVD checkouts which is 43% of the total. 7,503 were Self-checkouts which is 8.5% of total checkouts.

The usage grew from August through October, then dropped slightly in November. Percentage-wise, the corridor self-check was used 24% more than the desk self-check in August which increased each month to 41% more in November. We believe that there are two reasons that the corridor self-check is used more often: 1) it is more private; and 2) when patrons approach the desk self-check, staff offers to help them check out, so patrons often choose a "live" check out. We also think that the desk self-check is used less often because of the traffic flow. It is located at a busy corner.

Self-check can be used for books from the stacks, current lit, paperbacks, audiobooks. DVDs cannot currently be checked out on the self-check due to the locking case and the barcode being on the inside cover. If the DVD is unlocked, it can be checked out on self-check. Cassette tapes can not be checked out on the self-check because the desensitizer would destroy the media, so WMS identifies them and does not check them out.
### Corridor Self-check Stats
**Items Issued By Day Of the Week**

**Machine:** 3M-2UA10503XJ

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### Check Out Desk Self-check Stats
**Items Issued By Day Of the Week**

**Machine:** 3M-DB12GK1

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**General Considerations:**

DVDs are high usage items so it would behoove us to find a way to use them with the self-check.
Open hold shelves would mean patrons can pick up and self-check hold items.
Potential cuts to the student wage budget means less staffing at check out desks making self-checks more desirable.
Self-check needs to be promoted if we want to increase its usage.

**Research:**

Articles found in databases were mostly outdated, 2010 being the newest article we found. There are libraries using self-check in conjunction with a checkout desk and others solely using self-check.

DVD vending kiosks are available that may work with Worldshare Management Systems, but several would be needed to hold the volume that we own. As of 4/6/2014, we have 12,457 DVDs in the entertainment collection. There are also vending kiosks for iPads which not only check the items in and out, but also charge them when they are in the kiosk cabinet.

There are self-check systems compatible with RFID security systems which include a device that unlocks DVDs after checkout. We use a 3M electromagnetic system for which no such technology is available.

Some libraries are moving to the open hold shelving. There are privacy considerations that would need to be addressed. The majority of items on our hold shelf are now ILLs since we no longer permit recalls.

**Other Libraries:**

Group members contacted several libraries to find out if they have self-check and visited two to see their set up.

Libraries without self-checks and no plans to have them: Greensboro College, Guilford College, Wake Forest, UNC-CH, Winston Salem State.

Libraries without self-checks, but considering them: High Point University (only when new library built). GTCC plans to purchase two self-checks, one for their Aviation Campus and one for their new facility.
Libraries with self-checks:

- Duke University, Perkins Library (contacted by phone)—three self-checks, one by each entrance. They are highly visible, so they do not make any effort to promote them. One is right next to the main circulation desk, so when they are busy, they point out to patrons that they can self-check. Other than that, they do not promote them in any way, and they do not feel that they are much used (no statistics were available to back up that statement).

- Greensboro Public, Main (visited)—used in conjunction with main check out desk. Self-checks are banked together and located in front of the circulation desk so that patrons must walk past them to get to the desk. They use RFID. Self-checks include a decoupling device that allows borrowers a small window of time in which to insert DVDs to unlock after check out.

- North Port Public (FL) (visited)—totally self-check, located near exit. Uses RFID. Service points are for info and reference help only. An office is near the self-check where patrons can seek help when necessary.

Further Considerations and Recommendations:

Location Options:

- The corridor self-check is used more frequently than the desk self-check. It is by the path between the tower stacks and both egress doors. The desk self-check would be better located further from the desk. Two locations to consider would be in the Jackson Reading Room and in the lobby where the Reference desk is located. JRR contains the DVD collection, current lit, and audio books. If DVDs could be checked out on the self-checks, it would be more convenient for patrons borrowing from these collections if they planned to leave by the College Avenue exit. The same could be said of locating self-check in the Reference lobby and the added benefit would be staff nearby to help when needed.

- If the check out desk is reconfigured due to changes in the Technology Lending, both self-checks could be located on the desk in an effort to drive up their usage by limiting the patron’s options for live check out.

- Another option would be pairing the self-checks in an area that patrons would have to pass to get to the checkout desk, so you would have a bank of self-check machines.

- Another possibility would be to bank them in the hallway where the corridor self-check is currently located or move the one from the checkout desk across from the corridor location against the column at the outside edge of the info commons.
• Removing the self-check from the desk would require a new desktop for the check out desk and a new cabinet for the self-check. Our 3M tech said the cost would be lower if we built our own cabinet rather than purchase one from them.
• Relocation self-checks would entail consideration of electrical and internet hookups.
• A book drop would need to be near the self-check for items which cannot be renewed due to request placed by another patron.

DVD Options:
• All options to make DVDs self-check ready involve materials, equipment, and labor which would make any option costly.
• In order to have DVDs unlock as part of the self-check process, we would need to change to an RFID security system. Doing so would require new self-checks, security gates, and other security-related equipment, and thus require converting and retargeting the entire library collection to RFID. For this option we would also have to rebarcode the DVDs on the outside of the cases.
• A less expensive option would be to move the DVD barcodes to the exterior of the cases so that they can be checked out on the existing self-checks. Decoupling devices would need to be located exterior to the security gates. A bank of several at each gate is recommended. Borrowers would check out on the self-check, then exit through the security gates and unlock the DVDs. This option was recommended by our 3M technician and is in place at other libraries.
• The main drawbacks to both options are the cost of new barcodes and the manhours involved in rebarcoding each DVD and changing the catalog info. The last time we ordered barcodes, we received 20,000 at a cost of $393. RFID labels cost about 14 cents per label if we order at least a half million.
• Technical Services has suggested three methods when rebarcoding: do nothing with the old barcode, peel out the old barcode, or leave the old barcode, but blacken it. In a rough estimate, they think they could process about 30 DVDs per hour using the quickest method. Complications (titles not in system, lost, missing, checked out materials) would take longer. Conservatively it would probably take one staff at 20 hours per week approximately 21 weeks to accomplish.
• To RFID the entire collection, we would have to consider whether it can be done at the shelves without having to move the books/items (ideal method according to Cataloging). The project would take research into how other libraries are accomplishing the task, what is involved, and what pitfalls may be encountered.
• Barcodes on the outside of the cases bring their own problems as they do not always stick to the cases as they should. They would need to be covered with clear packing tape.
• Another drawback might be the number of patrons who return angry because they couldn’t watch the DVD because it was locked (patrons can be angry even when they caused the problem themselves) or having broken the case while trying to get into it. Or even worse, patrons who find a YouTube video demonstrating how to unlock the cases at home giving them ideas on how to remove DVDs from the library without going through checkout.

Holds on Open Shelving Options:
• One of the main concerns is privacy for patrons. That could be remedied by using partial names, like four letters of the last name followed by three letters of the first name or having patrons use a made up “pin” name to identify their holds.
• Location may be an issue. The best place would be next to a self-check so the patron could pick up the hold and check out without involving staff.
• Since we no longer do recalls, the majority of items on our hold shelf are ILLs. Since items from other libraries may not be targeted or may not work with our targeting system, ILLs would still need to be held behind the desk.
• The number of our items on Hold is so small that it would likely not be cost effective to set up a separate location for them. For the week of 4/1-4/7 (a fair representation of normal activity), we had a total of 155 items on the hold shelf as a result of ILL and patron hold requests; 138 were ILLs, 17 patron holds. Thus approximately 11% of these items were patron holds. With that small a percentage, it would likely not be cost effective to set up a separate location for them.
• Holding our books and ILLs in two places could be confusing for patrons who often times can’t remember if they have one of our books on hold or an ILL.
• Instructional DVDs/Videos are currently placed on the hold shelf for faculty who are using them for a class. These are not targeted and could not be left in the open. Also Video Cassettes and all other magnetic media can not be used at the self-check due to damage issues.
• While storage items could be put on open hold shelves, there may be confusion with Building Use Only items. Since storage items have to be put on the hold shelf to await patron pick up, patrons may not understand that they can’t leave the building with certain items.
• We also keep 3-day holds on the hold shelf for a variety of reasons. Since these are on hold on paper only and not in WMS, they would be available in the system but possibly unable to locate.
• Another category kept on the hold shelf is items being returned to faculty after we use them for Course Reserves. Most of these are personal property which it would be unwise to leave on open shelving.
Reserves:

While not a part of our charge, the group identified another possibility for reducing desk traffic: self-service Reserves. Reserves items would have special needs to make them a self-check collection.

UNC-CH has a closed stack Reserves room where students pass through a security gate and remain in the room with the books. For reserve items that are allowed to leave the room, they check out at the circulation desk before passing through the security gate into the main part of the library. The room is set up for study and has some carrels with computers.

- Our hardcopy reserves collection has diminished in size each year.
- To make a closed reserves room, we would need to have space next to the checkout desk, so the collection could be monitored and items would not escape.
- This would also entail another security gate.
- Limited space on the first floor and limited personnel would be major considerations when exploring the possibility of creating this type of room.

Promoting Self-check:

Promotions would help increase the usage of the self-checks. We should include information on where they are located, how they work, who can use them, what types of items can/cannot be checked out, and that you can renew items using the self-check.

Ideas:
- Signage to draw patrons to the self-check; flashy signs like the Ask Us mobile or big arrows; possibly twinkle lights or a disco ball.
- Signage showing in simple pictures how to use the self-check.
- Asking SOAR tours and New Hire tours to include where self-checks are located and how to use self-check during the tour.
- Celebrations like Self-check Birthday Bash.
- Offers like a raffle ticket for using self-check with the prize being a t-shirt with a logo like “I self-checked in Jackson Library” or “Keep Calm and Self-check”.
- Footprints in neon colors leading from the elevators to the self-check.
- Place a rug/mat in front of the self-check to designate the area, maybe with the words “Self-check Here”.
- Get circulation staff to talk up the self-check.
- When busy, someone call out politely/friendly, “Remember, folks: books can be checked out on the self-check right over there!”
• During the first week of classes, assign a student employee to stand by the self-check and teach patrons how to use it.
• Put a face on it; make it inviting.
• A contest to name the self-check.
• Put an “ad” on the giant TV screen by the info commons.
• Add info about self-checks on the borrowing web pages.
• Start labeling it self-check/renew on signage.

Summary and Conclusion:

The Self-check Working Group was charged with examining how we can better utilize self-check in order to free up staff for higher level work. We were tasked with visiting other libraries that use self-check and benchmarking other libraries virtually; rearranging the Check Out Desk to highlight self-check better in cooperation with changes made to tech lending; examining self-check for the entertainment DVD collection; exploring open hold shelves; and training staff to encourage customers to use self-check.

With the rate of growth and the popularity of the DVDs, it would benefit us to switch to a method for self-check of this collection. Our stats show the potential for freeing up desk staff. Options for the future include barcoding the outside of the collection and using RFID. Both options would be expensive, but if we switch to RFID, we would need to convert the entire collection and get new security systems in place, thus exponentially raising the costs.

Rearranging the checkout desk would depend on decisions about the tech lending equipment. Relocating the self-checks would involve considerations not only about the best place to put them, but also the availability of electricity and internet hookups. We would also need to look into traffic flow around the desk and through the connector doors.

Open hold shelves are gaining in popularity, but due to the nature of the variety of items we keep on the hold shelf and the small percentage of what could actually go onto open shelving, this does not appear to be in our best interest.

Ideas for promoting self-checks can be relatively inexpensive. There are many that can be implemented in the near future with simple planning and organization.