

Resource Sharing & Fulfillment Open Call
Thursday, November 4, 2021
11am - noon

Agenda and Minutes

Attendees please add your name as you join the call: Robert Deane (OIT), Bahram Refaei (Linfield), Jesse Thomas (WWU), Jenny Bornstein (LCC), Jean Fenske(Evergreen), Stacey Kemi (PCC), Brian Kelley (Reed), Julie Dregson (OSU-Guin), Evan Lantzy (UID), Tyler Rodrigues (UID), Jewel Evenson (UW), Valerie Sterling (OSU), Renee Corbett (WALLA), Jada Pelger (UPS), Bill Kelm (WU), Dena Madrid (WSUV), Brian McManus (WSUPUL), Jennifer Rossie (UW,) Kate Jones (SOU), Raymond Baile (Lane CC), Emily Moxley (COCC), Paul gardner (OHSU) Tricia Bender (CHK) Molly Gunderson (PSU), Drew Jackson (Pacific U); Charity Braceros-Simon (Willamette), Galin Brown (WU-Law), Abby Mason (OSU-Valley), Katie Bowler (OSU HMSC Guin), Brent Waller (UW), LoriAnn Bullis (WOU), Jennifer Bosvert (PacFG), Cassandra Palmore (UPS), Lara Nesselroad (UO), Jane Scott (UPOINT), Lori Hilterbrand (Alliance)

1. Announcements
 - a. [Anonymous Ask](#) (Charity)
 - b. Slip server (Lori)
 - i. All but 2 institutions have responded.
 - ii. About 75% of folks have moved off the slip server.
 - iii. Check in with Lori if you have questions as we move forward. Still helping out with some individual questions that come up.
2. [Release Notes](#) (Molly)
 - a. Not a lot of changes this month
 - b. Monitor Jobs Page - Job results now display on this page
 - c. Semi Annual Re-Indexing - Happening during this month's release. Reminder that this will delay when some items are visible in the catalog.
 - i. This will no longer be an issue when we move to VE.
 - d. API for Circulation Desk
 - e. Some good stuff coming in the December release
3. Fulfillment Standing Group monthly demo - Closed Due Date Management (Robert Deane)
 - a. This can be updated through Terms of Use and Policies
 - b. Changes are made at the Terms of Use level
 - c. Good for holiday closure changes and saving patrons internal stress and confusion.
4. [Courier](#) update & review (Kate Jones, LoriAnn Bullis, Lori Hilterbrand)

- a. [Website](#) tour - LoriAnn
 - i. Order tab: create, delete, track, and reprint
 - ii. Resources tab: claim and problem reporting forms (Expak seems responsive), Reference Guide (helpful for training)
 - iii. Reports tab : for printing labels
- b. Labels -Lori
 - i. Participating library
 - ii. Save notes can be helpful. Remember to click the Save Notes button!
 - iii. Select all or select individual labels
 - 1. If you accidentally close the tab with the labels, you might be able to use the “reopen closed tab” option in the browser
 - 2. Participating Library info formatting is being worked on
 - 3. If you want to have a back-up copy of the labels, save them as a PDF before you print. That way you can go back to the file if you have an issue with your printer the first time around, etc.
- c. Forms - Kate
 - i. Closure report form
 - 1. If your library is going to be closed for a day or more and you want to stop courier service.
 - 2. This is an automated form, so if you put in a date it will automatically pull you from the route for that time.
 - a. If you are closed more than 5 days, let Lori know so you can be removed from the rota for that time frame.
 - b. Lori will send out a reminder to everyone to get this info at the end of November.
 - 3. If you have a more complicated or nuanced closure, you’ll want to use the Problem Report form. Use the “Other” category.
 - ii. Problem report for:
 - 1. Bin requests, concerns about drivers, etc.
 - 2. Remember that it is worth it to put in a report so you can let ExPak monitor trends (like late deliveries, etc.) Can always mark it as “FYI” in contact desired field.
 - 3. “Other” for anything else (like a nuanced closure).
 - iii. <https://www.orbiscascade.org/programs/rsf/documentation/courier/holidays/>
 - 1. If you are closed the same day as the courier, you don’t need to file a closure report form for that day.
- d. [Claims](#) - Lori
 - i. Shelf check both sides
 - ii. APB - ask others in the Alliance to look for it as well
 - iii. Claim form - label number if you’ve got it!
 - iv. Pictures if it’s damage - can’t attach them to the form, but you’ll be asked for pictures as soon as you start working with ExPak on the issue.
 - v. 30 day window from ship - There is an understanding that this claim window is too short. Right now it is the way the contract is written so we

don't have flexibility. This is a point to look at improving in the next contract.

- vi. Cost should be the current replacement cost, not what it cost you to purchase it originally.
- vii. Communication and customer service - Three people covering 7 days a week. Let's have as much patience as possible.
- e. Drivers/Subcontractors - LoriAnn
 - i. Aware that there are ongoing issues based on survey response.
 - ii. Communicate your needs and be as patient as possible.
 - iii. Communicating with the driver can be helpful, also need to let ExPak know.
- f. Unattended deliveries? Mutually agreed upon - Kate
 - i. Making changes (like early morning or evening, alternate location) it is possible if discussed and agreed upon with ExPak
 - ii. Reach out and request with ExPak
 - iii. 14 day notice required and ExPak has 5 days to respond.
 - iv. Remember that anywhere you want them to leave the books you have to be able to get to to put your books for pick-up.
- g. Summary of our board report - Lori
 - i. Majority of the case we are pretty pleased with ExPak
 - ii. There are concerns
 - 1. Claims - window too short and CS not great
 - 2. Driver training - need to get the new folks up to speed
 - 3. Scanning and tracking - high level of satisfaction when performed correctly
 - 4. Delivery time and service windows - Seattle and Spokane routes in particular
 - 5. Label printing - move away from the 2 hour window
 - iii. Recommendation to stay with ExPak and negotiate with improved service
 - 1. Service levels are pretty good overall
 - 2. Not many options out there. Delivery market has collapsed even more during the pandemic.