



EMBEDDING OUTREACH SERVICES MANAGER IN YOUR OUTREACH

KIRSTEN HENAGIN, ADULT SERVICES MANAGER

PRESENTATION OVERVIEW

- Our Outreach Services
- Past & Current Procedures
- Outreach Services Manager Setup & Demo



OUR OUTREACH SERVICES



DAYCARE DELIVERY

Monthly delivery to daycare sites and centers



SENIOR DELIVERY

Monthly delivery to senior living facilities

**Only service using
Outreach Services
Manager**



OFFSITE PROGRAMS

Daycare storytime
Offsite book clubs
Pop-up library events
Little Red Reading Bus route



PROMOTIONAL

Tabling & Presentations

PAST PROCEDURES

Procedures

- Paper binder per site
- Visited all sites on different days and times of day
- Staff selected materials haphazardly
- Staff brought ~40 items a visit

Challenges

- Heavily manual process
- Paper-based
- Siloed information
- Not tailored to patron
- Lost patron's special requests
- Hit or miss patron satisfaction

CURRENT PROCEDURES

Current

- Centralized visit days
- Each patron completes an intake form with preferences
- Preferences managed in ORS
- Patrons can request items and provide feedback on items

Achievements

- Modernized process
- Reduced paper use
- Tailored to individual patron

Challenges

- A few Polaris bugs
 - Search / generated lists
 - Notes
- Learning curve of new process

POLARIS OUTREACH SERVICES MANAGER (ORS)

Administration Explorer - System - ODIN Search - Polaris

File Edit Help

Administration Explorer - System

- Cross Reference Display Constants
- Currencies
- Dates Closed
- Fee Descriptions
- Fine Codes
- Fines
- Floating: To Branch
- Floating: Collection Limits
- Floating: Material Types
- Floating: Material Type Limits
- Fund Categories
- Hold Routing Sequences Primary
- Hold Routing Sequences Secondary
- Initial Articles
- Item Availability Display Order
- Item Statistical Class Codes
- Link to Supplier Databases
- Loan Period Codes
- Loan Periods
- MARC Language Scoping Display
- Material Types
- Outreach: Delivery Mode

Outreach: Delivery Mode

Organization Name	Description
West Fargo Public Library	Delivery
West Fargo Public Library	Pick-up
West Fargo Public Library	Mail

Administration Explorer - System

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- Outreach: Delivery Mode
- Outreach: Delivery Route / Stops

Outreach: Delivery Route / Stops

Organization Name	Route Name	Description
West Fargo Public L...	Dakota Commons	Dakota Commons
West Fargo Public L...	High Rise	High Rise
West Fargo Public L...	New Perspectives	New Perspectives
West Fargo Public L...	Serenity Apartments	Serenity Apartments
West Fargo Public L...	Sheyenne Crossings	Sheyenne Crossings
West Fargo Public L...	Monterey and Brighton	Monterey and Brighton

- Outreach Delivery Mode (Left)
- Outreach Delivery Route & Stops (Above)

POLARIS OUTREACH SERVICES MANAGER (ORS)

Administration Explorer - System - ODIN Search - Polaris

File Edit Help

Administration Explorer - System

Outreach: Pick List Headers

Organization Name	Header Column	Display Order	Included
West Fargo Publi...	Author	1	Yes
West Fargo Publi...	Title	2	Yes
West Fargo Publi...	Material type	3	Yes
West Fargo Publi...	Collection	4	Yes
West Fargo Publi...	Call number	5	Yes
West Fargo Publi...	Item Assigned bran...	6	No
West Fargo Publi...	Item Status	7	Yes
West Fargo Publi...	Item Barcode	8	Yes
West Fargo Publi...	Shelf Location	9	Yes

Administration Explorer - System

Outreach: Excluded Circ Statuses

Organization Name	Circulation Status	Excluded
West Fargo Public Library	Available	No
West Fargo Public Library	Bindery	Yes
West Fargo Public Library	Claim Missing Parts	No
West Fargo Public Library	Claim Never Had	Yes
West Fargo Public Library	Claim Returned	Yes
West Fargo Public Library	EContent External Loan	No
West Fargo Public Library	In-Process	No
West Fargo Public Library	In-Repair	Yes
West Fargo Public Library	In-Transit	Yes
West Fargo Public Library	Loaned	No
West Fargo Public Library	Lost	Yes
West Fargo Public Library	Missing	Yes
West Fargo Public Library	On Hold	Yes
West Fargo Public Library	On-Order	No
West Fargo Public Library	Out-ILL	No
West Fargo Public Library	Returned-ILL	No
West Fargo Public Library	Routed	No
West Fargo Public Library	Transferred	Yes
West Fargo Public Library	Unavailable	Yes
West Fargo Public Library	Withdrawn	Yes

- Outreach Pick List Headers (Above)
- Outreach Excluded Circ Statuses (Right)

POLARIS OUTREACH SERVICES MANAGER (ORS)

Outreach Title Rating ✕

Rating	Description	Highest: <input type="radio"/> 1 <input checked="" type="radio"/> 5
1	<input type="text" value="Did not get a chance to read/watch/listen."/>	
2	<input type="text" value="Did not enjoy this item."/>	
3	<input type="text" value="Okay. This item was so-so."/>	
4	<input type="text" value="Good. Enjoyed the item."/>	
5	<input type="text" value="Loved it! Highly recommend this item."/>	

POLARIS OUTREACH SERVICES MANAGER (ORS)

- Patron Profile
- Processing Items for One Patron
- Processing Items for Multiple Patrons
- Reader Ratings
- Reporting

REPORTING OPTIONS

Available Reports:		
Name	Type	Date Modified
 All ORS Patrons	Report	4/12/2022 7:51 AM
 Item Circulation Statistics for ORS	Report	4/12/2022 7:51 AM
 ORS Rated titles	Report	4/12/2022 7:51 AM
 ORS Rated titles by patron	Report	4/12/2022 7:51 AM
 ORS titles not rated	Report	4/12/2022 7:51 AM
 Outreach Service Pick List by Date of Next Service	Report	4/12/2022 7:51 AM
 Outreach Service Pick List by Delivery Mode	Report	4/12/2022 7:51 AM
 Outreach Service Pick List by Route	Report	4/12/2022 7:51 AM
 Patron Circulation Statistics for ORS	Report	4/12/2022 7:51 AM

QUESTIONS?



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