



# Collected Wisdom for Responding, Recovering, and Thriving in a Changed World

Insights from the Ex Libris  
Customer Community

# Collected Wisdom for Responding, Recovering, and Thriving in a Changed World

by the Ex Libris community

In less than half a year, the world has changed dramatically. The impact of Covid-19 has been felt in academia with the move to online classrooms and many closed campuses. For libraries, the forces of change include financial uncertainty, an accelerated transition to remote learning, digital transformation, collaboration, and changing librarian roles.

Like all institutions open to the public, libraries face limitations beyond their control, whether imposed by government, regulatory agencies, or university administrations. However, they can decide on a response, what steps are needed to recover, and how they can thrive going forward.

Even when a library building was closed, its activities did not end. It may have had to dramatically change the way things are done – with staff moved offsite, services provided remotely, more electronic and digital resources, book drops, etc. – but intense effort went into maintaining access to resources and patron support. The core of the shift has been understanding the library as a service, rather than a space.

As the library at Austin Community College in Texas put it during its recent awareness campaign to students and faculty: “We’re still here, you just can’t see us.”

To manage continuity, learn from the past, and prepare for what’s next, libraries and librarians have made tremendous innovations and rapid adjustments.

**At Ex Libris, we believe that empowering each other leads to positive change. That’s why we have collected feedback from our customers on how they are providing a safe and effective learning environment in this new and challenging situation.**

Distilled from hundreds of responses from around the world, this is intended as a useful reference manual of viewpoints and ideas for libraries of all kinds. As a result, some of the tips may conflict with one another - such as book quarantining, access to the stacks, control of foot traffic, and the like - reflecting the truth that one size does not fit all. Jump to any section and learn what your colleagues are doing or plan to do to adjust, and get an idea of what might work for you.

Perhaps this manual itself is an indication of how our industry is meeting the challenge of the times - with a proud spirit of collaboration.



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## Community Insights: Remote and On-campus Operations

With students, faculty and library staff learning, teaching and working remotely or in a hybrid format, managing library operations requires a new, creative approach. Questions arise regarding the ability to track the activity of work-from-home employees, whether the correct response is more frequent meetings or more targeted communications, or both, the role of greater automation of workflows, the need for unified, cloud-based solutions, how to schedule on-campus shifts effectively, and much more.

### Remote services

- Implement a ticketing system using LibAnswers to track all types of requests - new purchases, scanning, borrow a book, etc.
- Increase virtual reference services (such as Ask-a-Librarian, Virtual Informational Literacy, etc.)
- Set up a laptop with a webcam and an open Zoom meeting at the physical circulation desk, so that students can speak to library staff virtually.
- Use Zoom break-out rooms and share screen for library instruction, as both the instructor and students can clearly see what is happening on-screen without the difficulty of maintaining social distancing.
- Utilize WebEx Teams internally, as well as for faculty and student contact.

### Scheduling

- Set up pods for staff scheduling so employees always interact with the same group of people, allowing you to limit the impact on staffing if members of a pod are quarantined.
- Provide staff a work-from-home form with defined plans and goals.
- Maintain 50% or less office occupancy by staggering in-office schedules.

- Use an ABC work schedule - one week physically in library, two weeks working remotely, creating a repeating semi-quarantine.
- Stagger hours for staff in one location so there is no overlap.
- Assign specific library tasks to specific shifts or pods, so staff members are not all attempting to do the same thing at all service hours.
- Divided your library services staff who come into contact with the public into three groups, assigned to the library on set days of the week.
- Cross-train your staff to cover for a temporary lack of student employees, as well as to fill in for those staff members who for cannot, or do not want to, return to campus.
- Assign on-campus staff their own workstations wherever possible.
- Reduce staff hours to minimize possible exposure.

### Staff communication

- Use Microsoft Teams on personal PCs for most staff meetings, rather than videoconferencing with several employees in a shared space.
- Hold brief morning meetings three times a week with the senior library team, rather than longer fortnightly meetings.
- Hold virtual coffee chats (about 15 minutes) with library staff one to three times a week.
- Using Google Hangouts to keep staff connected at all times and working together on a daily basis.
- Hold a staff trivia night via Zoom to encourage team spirit and foster connections (and have some fun during this stressful time).

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## Community Insights: Student and Faculty Engagement

Modern expectations regarding responsiveness among service providers, especially online, were already increasing. The Covid-19 pandemic has accelerated that process, with students, faculty and staff expecting the library to be agile in meeting their needs anywhere and anytime. Libraries are endeavoring to respond, while also developing new channels of engagement.

### Awareness

- Partner with instructors to help faculty and staff with the transition to online learning and awareness of electronic resources.
- Proactively reach out to faculty and students to let them know what new services the library is offering.
- Increase social media outreach.
- Convert in-person library orientation programs into online events
- Develop synchronous and asynchronous options for on-campus library orientations.
- Create videos detailing library services provided during campus closures.

### Making engagement easier

- Be sure to offer online options for those uncomfortable with on-campus library services.
- Offer a scheduling feature for video consultations with patrons needing assistance.
- Make it easy to return hard copy assets, by sending UPS labels, etc.
- Increase hours for online services.
- Add forms to make reference and consultancy requests as easy as possible.

- Provide more access to OER services.
- Examine all interfaces and online portals for ease of use and comprehensiveness.
- Make processes as transparent as possible to the patron, with a single point of contact online.
- Provide a digital concierge at help points in the library, presenting a friendly on-screen presence.
- Use technology to connect small groups whose members are physically separated, such as several students in the library videoconferencing with a student or professor unable to come to campus.
- Use of instant messaging and chat options, which students seem to prefer to Zoom and email.

### New and extended services

- Re-envision your reference library staff to include consultancy.
- Introduce embedded library instruction on the university web portal.
- Develop more online resources to help remote patrons use the library effectively.
- Share library guides that provide regular updates on your online resources, accessing collections, opening hours, maximum occupancy rates, and the like.
- Create an online tutorial about Covid-19 misinformation and tools to evaluate mass media reporting.
- Host virtual library events such as common reads, author visits, faculty presentations, book club and film discussion group meetings, and MakerSpace activities.

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### Engagement measuring

- Incorporate tools to help instructors monitor student engagement.
- Work with other institutional stakeholders to identify students at risk, based on engagement data.
- Offer an opt-in option for recording engagement data on a personal level and displaying the data to academics.
- Enable the export of engagement data to institutional learning analytics platforms.

### Handling health concerns

- Create a script for staff who have to approach students failing to comply with health-related restrictions.
- Be aware of the need for clear plastic masks for interacting with patrons dependent on lip reading for full understanding.
- Create FAQs regarding the Covid-19 restrictions and closures.
- Provide FAQs and other guidance for staff or students required to enter quarantine.



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## Community Insights: Print Circulation

The circulation of print items is clearly a challenge that requires creativity and flexibility, with library responses including strict physical precautions, more digitization, increased self-service options, and more.

### In the stacks

- Close your stacks entirely to the public.
- Limit the number of people in the stacks at any one time.
- Only allow staff members to enter the stacks to retrieve requested items.

### Checkout, pick-up and return

- Allow patrons to request materials and place a hold on them through an online library portal, which automatically sends the request to the librarians.
- Deliver requested items to a central location in the library for pick-up.
- Use messaging to inform patrons their requested items are available for pick-up, possibly by appointment.
- Put requested books them in plastic bags for pick-up.
- Instruct staff to conserve paper bags for use in pick-up.
- Provide curbside pick-up and return service, even in the event of campus closure.
- Allow books to be returned only to a designated book drop.
- Create exterior, sheltered drop-off or pick-up points.
- Offer offsite locations for pick-up and drop off, for greater patron convenience and to take advantage of larger spaces.
- Reduce crowding at the library or the pick-up point with personalized appointments for patrons.

- Implement self-checkout stations and returns to minimize staff exposure.
- Use self-service checkout apps to minimize contact between patrons and staff and extensive handling of items.
- Use lockers for book pick-up by providing the requesting patron the locker number and code once their material has been placed inside, with a similar process for returns.
- Implement click and collect, with patrons able to take requested books from a designated shelf.
- Instruct staff to fulfill requests only by handing items through a partition set up in the library entrance or lobby.

### Returned items

- Leave returned books in the designated book drop for 72 hours before physically collecting them for processing.
- Hold returned items for 72 hours and then disinfect them.
- Isolate all materials for 96 hours or 4 days between service workflow steps, each of which is completed by different staff members.
- Clean returned books and quarantine them for 48 hours before re-lending.
- Use a UV ray book sanitizer (note, however, this is of questionable efficacy against Covid-19).
- Set up a “Quarantine” designation in Alma for returned books and equipment, with an alert date set to four days from their return to the library. Only after that time can the item be lent out again. This makes it easier to identify which items are currently available and prevents requests for items that are still in quarantine.



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### Fulfilling distance requests

- For non-residential students, ship requested print items with prepaid return label included.
- Limit the number of physical items that can be shipped to a single patron at any one time, as well as per semester.
- Allow patrons the option of having pages or chapters from print assets scanned and sent via email.
- Scan reserve readings for the first two weeks of the semester, when students will most likely not yet have their print textbooks.
- Work with other institutions to mutually provide services (pick-up and returns, equipment loans, etc.) for students who are taking classes remotely.
- Implement on-shelf requesting and digitization for your patrons.





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## Community Insights: Collection Development and Management

With an eye to the present challenges and to the future, libraries are exploring further development of their digitized, multimedia and electronic collections. They are also looking for ways to identify and respond to the real needs of remote students and faculty at all levels, while keeping within new, stringent budgetary limitations.

- Redirect budget allocations for physical resources to electronic collections.
- Focus on developing your digital collection.
- Expand your streaming video and multimedia offerings in support of academic courses.
- Purchase extra e-book sets and single-volume e-books outside the sets offered by conventional vendors.
- Expand your open educational resources collection.
- Use more free content.
- Expand bibliographic capacity.
- Explore options for instant curation.



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## Community Insights: Resource Access and Discovery

Resource access, lending and discovery is changing as the library has to become more agile to accommodate patrons and staff whose behaviors are currently in flux. Borrowing and lending continue from home offices and remote locations, while print loans decline in favor of e-resources, collaborations, collection sharing, and more. Similarly, online discovery searches have seen a dramatic increase in the last half-year, which has driven libraries to reconsider their patrons' user experience from a new angle.

### Patron-centered focus

- Shift your focus to address patron-facing services as a priority.
- Provide a “digital front door”, a single portal for all patron needs.
- Ensure PDF links to articles and book chapters in e-collections are available.
- Provide maximum remote and multichannel access to your library services.
- Allow students to request digitization of a book chapter.
- Allow students to request digitization of a limited percentage of a copyright-protected print resource.
- Allow digitized files to be shared with all students in a given course.
- Proactively ask patrons if they prefer an e-resource when they submit a request.
- Create videos detailing library services provided during campus closures.

### Reprioritizing resources

- Make sure as much of your collection as possible is available online.
- Take an organized accounting of which resources are available only in print and increase your scanning of physical reserves accordingly.
- Provide remote document delivery services for articles and book chapters.
- Activate electronic collections for limited periods of time, as needed.
- Join the HathiTrust collaborative repository and provide patrons access to its emergency temporary access service.
- Explore copyright options and flexibility with the goal of scanning more articles and chapters to be shared with students.
- Digitize journals and popular course reserves, so patrons are not sharing physical copies.
- For online document delivery, provide access to the resources via the SharePoint site.

### New workflows

- Move to unmediated lending, borrowing and discovery processes as much as possible.
- Introduce or expand controlled digital lending for reserves, institutional lending, and interlibrary loan.
- Provide online forms for document delivery and interlibrary loan.
- Make e-resources easily available in your learning management system through Leganto, decreasing dependency on physical materials.
- Use an “ebook detective service,” which automatically initiates an online and in-house search for e-resource equivalents of a requested print item.

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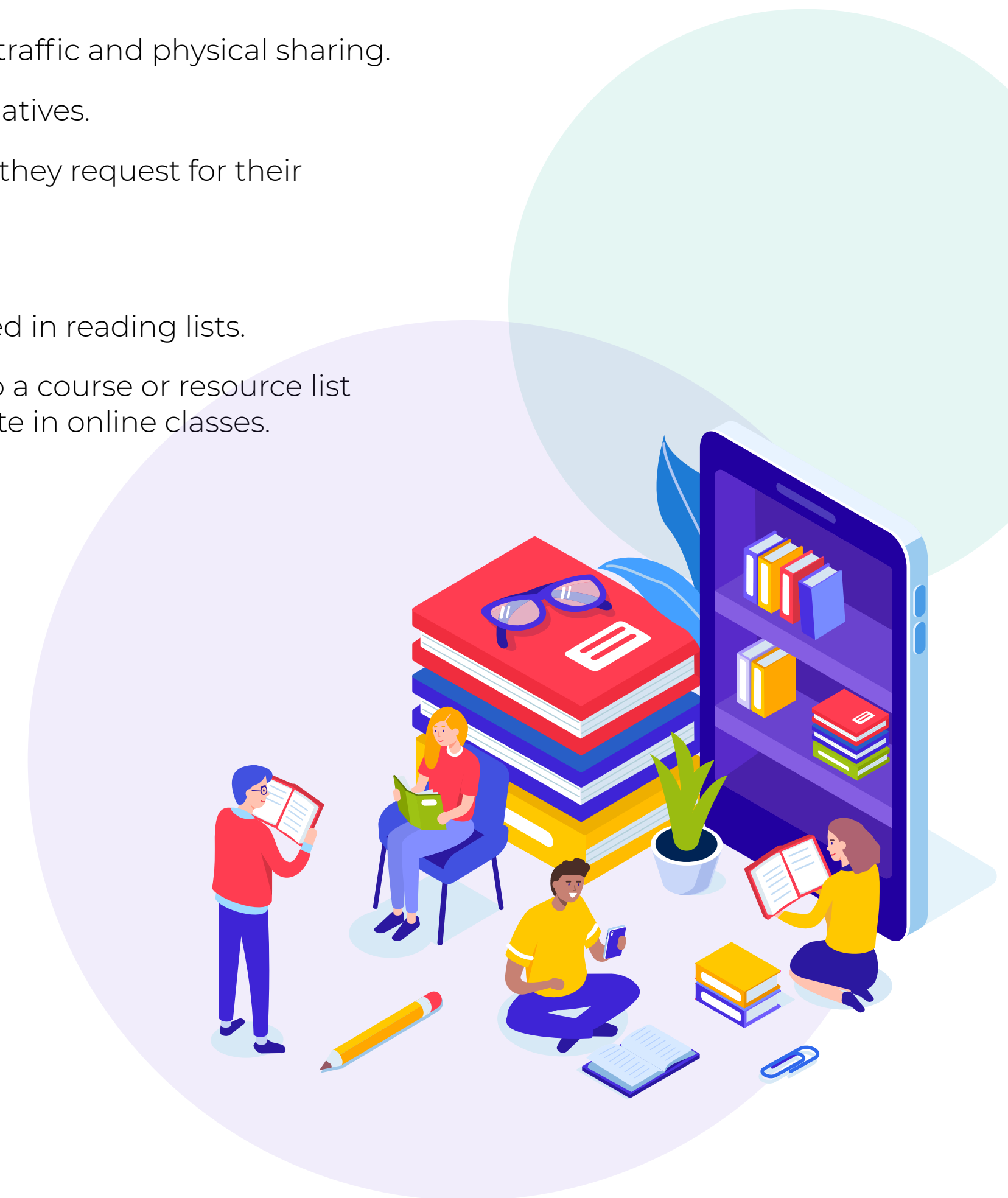
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## Community Insights: Course Resource Management

As part of the library's primary mission of supporting teaching and learning, librarians are working with academic staff to update and diversify their course resource lists for the new era. This includes assisting closely with the shift to more remote communication, e-resources and digitization.

- Identify and provide electronic or digitized equivalents of faculty reading list items, minimizing traffic and physical sharing.
- Eliminate physical course reserves altogether and work with faculty to identify e-resource alternatives.
- Consult with faculty regarding the possibility of obtaining only a chapter or two from full books they request for their course lists.
- Assist faculty to find and vet open access resources available online.
- Make open access resources searchable like every other library asset, so they can be incorporated in reading lists.
- Create modular instructional units, materials and information that can be easily embedded into a course or resource list provided through the learning management system, allowing students and faculty to participate in online classes.



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Ex Libris is making a series of services more widely available to higher-ed libraries around the world.

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## Community Insights: Research Support

Current academic research challenges, which will likely persist at least through 2021, include the visibility and discoverability of research output, effective use of open access and pre-print options, finding collaborators, increasing access to funding opportunities, managing remote workflows, and easy-to-use citation management..

- Create a repository showcasing all open access research output.
- Promote the use of searchable research funding opportunity databases.
- Introduce “Research on Demand” workshops, offering live sessions on how librarians can help students start their research, how to access and use databases, effective fact checking, etc.
- Develop online recorded modular courses on various research process and management topics, which instructors can then share with their students.
- Obtain small grants for faculty members to create open educational resource (OER) content that will be shared with the wider community.



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## Community Insights: Physical Facilities

Back to school! As academic campuses and brick-and-mortar facilities reopen, libraries are taking a variety of steps to implement social distancing and hygiene requirements. They have to develop practical approaches to time and space limitations, as well as stricter cleaning regimens and revised floorplans.

### Rethinking library access and spaces

- Get students and staff to scan QR codes at building entrances using a campus app, encouraging visitors to keep a diary of places visited and facilitate contact tracing.
- Provide an option on the webpage of the library or general student and faculty pages for users to indicate they are using the library today, with ID information used for contact tracing.
- Assign a staff member to welcome library visitors and to ensure only those with scheduled access times or specific permission are in the building.
- Only allow library access for students and staff.
- Reduce library staff hours but extend non-staffed hours for patrons.
- Adopt the “advance reservation” model for library access to use a computer, classroom, reference facilities or study space, with set blocks of time and limits on how often reservations can be made.
- Provide special library access times and services for vulnerable users (disabled, seniors, chronic health conditions, deaf, vision-impaired, etc.).
- Provide special library access times for commuters, adjuncts or other off-campus residents who do not have reliable Wi-Fi or excessive distractions at their off-campus work areas.
- Provide special library access times for specified activities, such as writing a dissertation or grant proposal, or using physical materials only available on campus, or language study, etc.

- Escort patrons to assigned seats.
- Allow walk-ins at designated times.
- Open new service points in the front entrance area or lobby of the building.
- Control building access using university ID readers.
- Install an automatic temperature-checking station that controls building access.
- Keep some areas of the library staff-only, with closed meeting rooms.
- Limit the number of public computers available and seating at all tables, as well as reducing study spaces.
- Close the circulation desk and rely on self-checkout stations.
- Re-purpose unused study rooms for temporary staff office space.
- Use furniture, book carts or caution tape to block off limited-access areas.
- Reduced the number of available chairs in strict accordance with capacity limits, allowing you to quickly visually determine if restrictions are being adhered to.
- Remove all comfortable seating to reduce dwell times.
- Institute flow control for any room or building with multiple doorways, so that people do not pass each other as they enter and exit.
- Clearly mark floors with direction of travel indicators.
- Use stanchions to map paths to permitted areas and to block off stacks.
- Cover shelving areas not in the stacks with heavy plastic sheeting.
- in-house search for e-resource equivalents of a requested print item.

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## Distancing

- Reduce building capacity by 75%.
- Assign part-time staff to monitor the number of people in the building and ensure it remains at 25% of normal capacity.
- Instruct patrons that the longer they remain in a single location, the more they must increase social distancing.
- Implement software that alerts librarians if patrons are closer to each other than permitted by social distancing standards.
- Implement activity trackers for library staff.
- Allow only one person at a time at a service desk and enforce the use of masks by both the service desk employee and the patron.
- Clearly mark six-foot (two-meter) intervals and traffic flow directions for all queues.
- Clearly mark a six-foot (two-meter) zone around all IT equipment, including printers and copiers.
- In the bathrooms, disable every other sink, drier, stall and urinal.
- At blind corners, install small mirrors to reduce the risk of people bumping into one another.
- Provided detailed signage reminding students of physical distancing requirements.

## Hygiene

- Clean and sanitize all spaces thoroughly after each use.
- Assign custodians to clean patron areas several times during the day.
- Require patrons to clean their hands before touching assets and to clean returned assets.
- Install extra hand sanitizing stations and distribute hand wipes in the library.
- Keep as many windows as possible open to improve air flow.

- Install free-standing air-filtration units.
- Provide sanitization stations with disposable towels, antibacterial sprays, hand disinfectant and guidelines for how to leave a staff work area safe for the next person.
- Provide sanitization stations near computers and study tables for patrons to clean the area before or after use.
- Replace all hand towels (in staff kitchenette, for example) with paper towel dispensers.
- Ensure all staff members wear masks or face shields, which they can only remove in office spaces that are off-limits to the general public.
- Ensure patrons wear masks at all times in the library.
- Provide clean pens to patrons and staff by using two separate pen holders, one for clean pens and one for used pens; the latter being quarantined at the end of each day and wiped down for reuse the following week.
- Provide laminated signs to place on all surfaces that were touched to indicate what needs to be cleaned without having to personally monitor each individual patron.
- Install plexiglass at the reference and circulation desks.
- Deploy sheets of plexiglass on portable stands, which can be repositioned to create isolation pods in suitable locations throughout the library.
- Provide disposable masks to patrons and expand self-check services.
- Issue reminders regarding health precautions on the PA system twice or three times a day.
- Remove keyboards and mouse devices from all shared or open computers in the library but allow students to request these items via a chat feature on the library website; after the items are returned, they must be sanitized before further use.
- Use small plastic pump soap dispensers that can be refilled using industrial-size sanitizer bottles provided by the college.



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- Label all soap and sanitizer dispensers with MSDS information.
- Plastic-wrap keyboards and replace the wrapping after each use.
- Remove all high-touch items, such as pens, paper, pencils, etc.
- Replace all physical periodicals with digital magazines from Flipster.
- Provide small cards at the library door for patrons to use to mark where they were sitting, allowing custodians to focus on cleaning areas that were in use and to indicate to other patrons areas that have not yet been cleaned.
- Only allow two people on opposite ends of study and computer tables, which are to be wiped down after each patron use.
- Use a designated group study room for staff members to work without masks if space is needed.
- Implement printing of PDFs sent from student laptops to the PaperCut queue in library copiers, providing print services from personal devices.
- Allow the use of a mobile app to print, instead of depending on library card swipes.
- Disable logging into printers and instead only use ID cards.
- Require patrons and staff to tip chairs forward in areas that have been used.
- Check out the 28-page CILIP report here: <https://www.covid19saferspaces.org>.





## About Ex Libris

Ex Libris, a ProQuest company, is a leading global provider of cloud-based solutions that enable institutions and users to create, manage, and share knowledge. In close collaboration with its customers and the broader community, Ex Libris develops solutions that increase library productivity, maximize the impact of research activities, enhance teaching and learning, and drive student mobile engagement. Ex Libris serves over 7,500 customers in 90 countries. For more information, see our [website](#) and join us on [LinkedIn](#), [YouTube](#), [Facebook](#), and [Twitter](#).

