

**Minutes of Evergreen Advisory Committee Meeting**  
**Pioneer Library System**  
**Monday, July 1, 2019**

**Committee Members Present:** Kelsy Hibbard-Baker (Geneva/Ontario), Judy Schewe (Naples/Ontario), Frank Sykes (Livonia/Livingston), Tracy Whitney (Marion/Wayne)

**Excused:** Lisa Gricius (Warsaw/Wyoming)

**Others Present:** Ron Kirsop (Assistant Director, PLS), Lindsay Stratton (Evergreen Consultant, PLS)

**1) Call to Order**

The meeting began at 1:12 PM.

**2) Approve Minutes from May 6 meeting**

Ms. Whitney motioned to approve the minutes. Ms. Schewe seconded. The motion passed 4-0.

**3) Old Business**

a) Length of patron account expiration

PLSDAC discussed changing Evergreen account expiration from the current 1 year. Three was deemed too short. Two seems like a better compromise.

This will be revisited at the next PLSDAC meeting, with this committee's recommendation being two years.

b) Automatic patron account renewal

This is not a feature offered by Evergreen at this time. There was a discussion about whether automatically renewing patron accounts might upset some libraries who want patrons to come in to renew their cards in-person on a yearly basis. Patrons seem to be confused about what account expiration entails and want ways to renew their accounts without coming in to the library.

This will be brought up at PLSDAC.

c) Birth year on patron records

Having only a birth year (no month or date) in a patron account is better practice for security/confidentiality purposes. However, some libraries use a full date of birth for identification purposes. Patrons should still be identifiable by their phone numbers and addresses.

In Evergreen, there are statistical categories for adult/child/teen patrons, but these have to be updated once the patron hits those milestones (i.e. a child patron to a teen patron, a teen patron to an adult patron). Lindsay said she guesses that most of the statistical categories are so out of date that they are functionally useless.

There is no option to put helper text next to date of birth field to show how it should be entered in the international format (YYYY-MM-DD). Lindsay submitted a bug ticket to Evergreen.

Is providing your date of birth the cost of doing business with the library? Date of birth plays an important factor in Evergreen reports.

The committee has decided to table this discussion unless it is brought up again by member libraries.

d) Confidentiality agreement

Would be for staff who use Evergreen who have access to confidential records/personal information. This agreement would be universal across PLS member libraries. Libraries can still do their own confidentiality/privacy trainings with new hires or refresher training, but this form would be mandatory.

Lindsay will send the current version of the agreement, which is a rough draft, to committee members.

e) September Evergreen upgrade

There will be a new “Preferred Name” field in Evergreen 3.3. This field will be searchable, not mandatory, and is in addition to the current “First Name” field. This will allow staff to search for a patron by their preferred name/nickname and still find the patron’s account. (I.e. if Susan Smith has the preferred name Sue, searching for Sue Smith will find her account.)

This field will be useful for patrons who do not go by their legal name because they prefer a nickname. It is also inclusive for individuals who are transgender who may go by a name vastly different from their legal one.

Member libraries should consider adding a new field to their registration forms to capture preferred names prior to the Evergreen upgrade in September.

**4) New business**

a) Text notifications

Lindsay will bring a list of possible text notifications to the next meeting. Currently, the only text notifications people receive are hold(s) available. We have the possibility to add notifications for overdue items, soon to be overdue items, and upcoming account expiration.

**5) Next meeting date/time**

Monday, October 7 at 1:00 PM at PLS.

6) **Adjourn**

Ms. Hibbard-Baker motioned to adjourn the meeting. Ms. Whitney seconded. The meeting adjourned at 2:03 PM.

Respectfully submitted,  
Kelsy Hibbard-Baker

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