Minutes of Evergreen Advisory Committee Meeting
Pioneer Library System HQ
Monday, October 7, 2019

Committee Members Present: Lisa Gricius (remotely) (Warsaw/Wyoming), Kelsy Hibbard-Baker (Geneva/Ontario), Judy Schewe (Naples/Ontario), Frank Sykes (Livonia/Livingston)
Excused: Patricia Baynes (Palmyra/Wayne), Tim Niver (Victor/Ontario), Tracy Whitney (Marion/Wayne)
Others Present: Ron Kirsop (Director, PLS), Lindsay Stratton (Evergreen Consultant, PLS), Kathryn Reidner (Cataloging, PLS)

1. Call to order
The meeting began at 1:13PM.

2. Approve minutes from July 1 meeting
Ms. Schewe motioned to approve the minutes. Ms. Hibbard-Baker seconded. The motion passed 4-0.

3. Old business

3.1 Autorenewal questions
There were questions about auto renewals at the most recent PLSDAC meeting.

Do auto renewals work for just the first initial renewal or all possible renewals?
The Evergreen Community recommendation is that only the first renewal is automatic. There are some concerns that if items automatically us up their allowed renewals, patrons may think their item will keep being renewed even though there are no more renewals remaining.

What will the renewal email say when received by patrons?
There are email notifications for both a successful autorenewal and a failed autorenewal, both of which should be customizable. The failed autorenewal tells the patron why the item(s) could not be renewed. Patrons could receive only one email listing what was successfully renewed and what was not.

Why don't we alter loan duration to be longer?
Renewals are good for circulation count. Having a six-week loan on an item would punish other patrons waiting for that item.

Ms. Stratton recommended not widely publicizing autorenewals, except perhaps on checkout receipts. It is important to state that autorenewals will be **attempted**, and that they are a **courtesy** only; patrons are still responsible for monitoring their item due dates and returning items on

time. This will be especially important for those patrons who do not have an email address on their account.

Ms. Stratton does not recommend allowing individual libraries to choose whether or not they want to use autorenewals; it should be system-wide or not at all.

Ms. Stratton stressed that implementing autorenewals would not change any existing Evergreen policies; items that are not renewable cannot be auto-renewed. People who have fines above $5.00 are still able to have items auto-renewed.

Mr. Kirsop asked Ms. Stratton and Mr. Sykes to collaborate on drafting and sending an email to directors summarizing this discussion and getting feedback/approval to move forward with this on November 1, prior to the next PLSDAC meeting.

3.2. Text notifications
Ms. Stratton will contact our vendor to see why text notifications did not come through when she turned them on for testing.

Possible text notification options based on current email notifications:
- 7 days overdue
- 14 days overdue
- 28 days overdue
- 42 days overdue (also says item will be marked lost)
- 3 day courtesy notice
- Your account needs to be renewed.
- Checkout receipt (currently only by email)

The notification for "Your item has been marked lost" is required to be sent by mail.

Ms. Hibbard-Baker asked Ms. Stratton to look into turning on the "hint field" next to the text message notification box, much like a "hint field" was added for the Date of Birth field. This would guide library staff on how to enter a phone number for text notifications without dashes.

3.3. Evergreen user confidentiality agreement
Mr. Kirsop will be presenting the user confidentiality agreement for additional comments at the next PLSDAC meeting. He is hoping that the agreement will be approved at the PLS board meeting on November 20th.

Some language will be taken out before it is approved. Other libraries should be able to use their own/existing confidentiality forms as long as that form cover the same points as the PLS form.

4. New business

4.1. Print button in patron registration/edit information screen

At least one library has reported that the location of the new print button when editing patron information has caused issues. Staff are printing the patron registration instead of saving edits, because the new print button is in the same spot that the save button was before the September upgrade. This is also a privacy concern because patron information is being printed and perhaps not properly disposed of. Ms. Stratton will check to see if it is possible to remove this button for PLS, or if it is something that is Evergreen-wide.

4.2. Auto-aging statistical categories of Child/Teen/Adult patrons
This is not possible currently. Statistical categories are not tied to anything else in Evergreen and have to be manually entered and changed. Juvenile/non-juvenile status (i.e. fine-free policies for juveniles) is managed by Evergreen and is based solely on the date of birth. Staff should be trained to look at statistical categories when they update patron accounts every two years. Libraries can request reports for everyone with the child/teen patron statistical categories and then manually change the status if the patron fits into a new statistical category based on their age.

4.3. Reports
Ms. Stratton has suggested that a review and cleanup of Evergreen reports should be done in the future.

4.4. OWWL catalog tutorial/handout
GPL requested that PLS create some sort of visual guide to help patrons with the online catalog and accounts; library staff can teach patrons when they are in the library, but something they can take home for future help would be appreciated. There is a Help section on the OWWL website that has links to Catalog and Account questions. PLS will look into creating a bookmark that points patrons to the Help section.

5. Next meeting date/time
Monday, January 6, 2020 at 1:00pm at PLS.

6. Adjourn
Mr. Sykes motioned to adjourn the meeting. Ms. Schewe seconded. The meeting adjourned at 2:42 PM.

Respectfully submitted,
Kelsy Hibbard-Baker