

**Minutes of Evergreen Advisory Committee Meeting**  
**Pioneer Library System HQ**  
**Monday, March 2, 2020**

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

**Others Present:** Dan Guarracino (Automation Librarian, PLS), Kathryn Riedener (Cataloging, PLS)

**Excused:** Lisa Gricius (Warsaw/Wyoming), Tim Niver (Victor/Ontario)

### **1. Call to order**

The meeting began at 1:05 PM.

### **2. Approve minutes from the January 13, 2020 meeting**

Ms. Schewe motioned to approve the minutes with corrections. Mr. Sykes seconded. The motion passed 5-0.

### **3. Old business**

#### **3.1 Online registration**

The committee discussed library card online registration. It was agreed that more information is needed before proceeding, including:

- What the workflow would look like for PLS and member library staff;
- If Evergreen can immediately issue a temporary library card number;
- How to prevent people from registering for multiple library cards to bypass the checkout and hold limits on Libby;
- What to do if someone signs up for a card online but already has one;
- The security risks of asking patrons to fax or email their ID to prove identity and residency;
- The security risks of asking patrons to enter personal information into an online form;
- Whether online registration would be open to anyone living in NY or just the four-county PLS service area, and how this would work for libraries that are close to counties not in the PLS service area (Seneca, Monroe, etc.)

The committee agreed there may be more demand for renewing cards online than registering for one, but that online registration would be a convenient service to offer.

Mr. Guarracino will prepare a variety of workflow possibilities for the next meeting so the committee can get a better idea of what the process might entail.

#### **3.2. Evergreen user confidentiality agreement**

Mr. Sykes questioned when PLS needs signed statements from directors that their staff have signed confidentiality agreements. Mr. Kirsop said he would have a procedure and deadline ready by the next PLSDAC meeting.

## **4. New business**

### **4.1. Auto renewal guide**

Mr. Guarracino and Ms. Riedener created a guide to the automatic renewal process. It is primarily meant for patrons, but also contains many talking points for staff. It will be available online. A simplified infographic was requested for sharing on social media or printing on tabletop displays.

### **4.2. Auto renewal notification emails**

The last PLSDAC meeting was canceled due to weather, so auto renewal language added to the pre-due notification email has not yet been approved.

Mr. Guarracino will make the following changes to the auto renewal notification email:

- Add a link to the bottom of the email that would direct patrons to the guide as mentioned in bullet 4.1;
- Add a space between each item.

He will also explore the following customization options for the auto renewal notification emails:

- Whether the subject can say how many items were successfully renewed and how many were not. This may help those patrons who only read email subjects before deciding whether they can delete the email or need to open it;
- If the email body can be organized so that all unsuccessful renewals appear at the top of the email, followed by successful renewals. This would be helpful for patrons who borrow a lot of items and don't want to sift through a list to see what was successfully renewed and what was not.

### **4.3. Patron card issue date -- Evergreen configuration**

Ms. Hibbard-Baker questioned if there is a way to include the date a library card was issued when looking at a patron's barcode history. Ms. Riedener confirmed that this is not currently an Evergreen feature, but that PLS could put Evergreen development money into this. For now, the only real way to track barcode changes by date are through notes/alerts.

### **4.4 PLS-I emails**

Mr. Guarracino will explore creating a listserv that would include only library circulation email accounts; this would be for the emails that are currently being sent to the PLS-I mailing list requesting that other libraries look for lost materials.

### **4.5 Hold slips**

The committee discussed patrons' personal and borrowing information printed on hold shelf slips. Many of the templates include the patron's full name, barcode, phone number, email

address, and the title of the item they placed on hold. This is especially concerning for self-service hold shelves and hold shelves that are viewable by the public, and should be considered a breach of privacy and confidentiality. The committee discussed the need to balance patron confidentiality and the convenience of staff workflow. Mr. Guarracino will begin a similar discussion with directors at the next PLSDAC meeting.

**5. Next meeting date/time**

Monday, May 4, 2020 at 1:00pm at PLS.

**6. Adjourn**

Ms. Baynes motioned to adjourn the meeting. Ms. Schewe seconded. The meeting adjourned at 3:05 PM.

Respectfully submitted,  
Kelsy Hibbard-Baker

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