

Minutes of Evergreen Advisory Committee Meeting

Via GoToMeeting

Monday, March 1, 2021

Committee Members Present: Patricia Baynes (Palmyra/Wayne), Lisa Gricius (Warsaw/Wyoming), Kelsy Hibbard-Baker (Geneva/Ontario), Tim Niver (Victor/Ontario), Judy Schewe (Naples/Ontario), Frank Sykes (Livonia/Livingston), Tracy Whitney (Marion/Wayne)
Others Present: Dan Guarracino (Automation Librarian, PLS), Ron Kirsop (Executive Director, PLS), Kathryn Riedener (Cataloging, PLS)

1. Call to order

The meeting began at 1:05 PM.

2. Approve minutes from the December 7, 2020 meeting

Ms. Schewe motioned to approve the minutes. Ms. Baynes seconded. The motion passed 7-0.

3. New business

3.1 PLSDAC Bylaws updates

As discussed at previous EAC meetings, EAC has its own bylaws but also exists as a subsection of PLSDAC. Proposed changes to PLSDAC bylaws would make EAC an official subcommittee of PLSDAC, and would do away with EAC bylaws.

The current EAC bylaws will not be dissolved until PLSDAC has approved the changes to their own bylaws.

Ms. Schewe motioned to support the amendments to the PLSDAC bylaws and keep the name Evergreen Advisory Committee. Mr. Sykes seconded. The motion passed 7-0.

3.2 Language of overdue notices and bills

Overdue notices and bills follow a system-wide template, so changes should be decided on collectively. Committee members commented that the printed and emailed overdue notices should match as much as possible.

Ms. Whitney suggested changing the subject of the auto-renewal email notifications. She said that the subject wording gives the impression, at first glance, that the auto-renewal was successful, and many patrons may see the subject and assume that their items were successfully auto-renewed. Committee members offered a few suggested changes, but left the final decision on the change to Dan and Kathryn.

3.3 Notes on patron records

Mr. Guarracino led a discussion about the Evergreen note feature. He pointed out that sometimes the notes are used in ways that may not be appropriate, especially notes that contain sensitive information; notes about particular items (such as items that were not picked up); and notes that remain on patrons' accounts past their usefulness.

Committee members requested that Mr. Guarracino look into creating an Evergreen report that would include each library's patrons that have a note on their account. If such a report could be created, it could be added to Evergreen so that libraries could appoint staff to monitor and delete notes on a regular basis.

3.4 Deleting lost items

Mr. Guarracino said that Evergreen could be configured to automatically delete lost items from the catalog. Mr. Sykes suggested that lost items be automatically deleted when the patron who lost them is also deleted from Evergreen. This would be eight years in total. Mr. Guarracino believes it would be possible to create a report of deleted lost items that could be sent to the owning library so that they can decide whether or not to repurchase them.

3.5 Deleting lost and paid items

PLS recommends deleting "lost and paid" items immediately after they've been paid for, but this process doesn't always happen. PLS can configure Evergreen so that lost and paid items are automatically deleted from the catalog after they are marked lost and paid, either immediately or the day after.

Committee members agreed that automating the deletion process would be fine as long as a report can be generated and sent to each library stating what items were lost, paid for, and deleted. Collections staff often choose to repurchase items that have been lost and paid for, so knowing what those items were is important.

3.6 Partial payments for lost items

When patrons lose an item, there is no PLS rule about whether they have to pay for the item in full. They are allowed to pay smaller amounts over time.

However, when paying in increments, they may end up paying more than the maximum overdue fine if the item ends up being found. For example, if a patron owes \$15 for a lost item and they pay \$7 toward it before they find it, they would only have owed \$5 in overdue fees. This can cause issues with negative balances in Evergreen. It also can pose a problem because many libraries do not offer refunds.

The committee agreed that it was not great customer service to prevent patrons from partial payments, as doing so may prevent them from using their account.

3.7 Gauging interest in OWWL-branded apps for iOS and Android

Hemlock is an app designed by an Evergreen user. It was previously only available for Android, but is now available for iOS. It can be customized with OWWL colors/logo, and also offers a scannable card feature in-app so that patrons could use it if they forget their physical library card.

The committee expressed interest in the app, which would be funded by PLS's Evergreen Research & Development line.

3.8 Library staff putting holds on other library items for displays

Mr. Kirsop suggested that libraries that request display materials from other libraries should not keep these materials for any longer than a patron would. This would be the initial three-week loan with up to two renewals.

3.9 Outside agencies creating multiple accounts

Some PLS libraries are seeing outside agencies (especially schools) creating multiple accounts, usually when their previous accounts are delinquent due to lost materials. Ms. Riedener explained that teachers and administrators should be coordinating with their school library media specialist to arrange the delivery of ILL materials through BOCES. When schools request items through the public library, BOCES loses out on funding.

3.10 Evergreen curbside module

Mr. Guarracino stated that PLS is looking for volunteer libraries to try out the Evergreen curbside module, and to contact him if interested.

3.11 Individual login trial

PLS is looking for a single library to try out individual Evergreen logins. Ms. Hibbard-Baker stated that Geneva would be interested.

3.12 Pending patrons

Evergreen version 3.6, coming in April, will include a feature that can automatically send an email as soon as a patron is added to the pending patron queue. This should help with the issue of pending patrons waiting in the queue for a long period of time.

4. Next meeting date/time

Monday, May 3, 2021 at 1:00pm via GoToMeeting.

5. Adjourn

Ms. Hibbard-Baker motioned to adjourn the meeting. Ms. Schewe seconded. The meeting adjourned at 2:47 PM.

Respectfully submitted,
Kelsy Hibbard-Baker