

# Minutes of Evergreen Advisory Committee Meeting

Via Zoom

Tuesday, October 11, 2022 at 1:00 PM

**Committee Members Present:** Kelly Deltoro-White (Mount Morris/Livingston), Debby Emerson (Wadsworth/Livingston), Lisa Gricius (Warsaw/Wyoming), Kimberly Iraci (Williamson/Wayne), Margo Prak (Dansville/Livingston), Erin Robinson (Arcade/Wyoming)

**Others Present:** Dan Guarracino (Automation Librarian, OWWL), Kelsy Hibbard-Baker (Technology Services Librarian, OWWL), Ron Kirsop (Executive Director, OWWL), Kathryn Riedener (Cataloging, OWWL)

## 1. Call to Order

The meeting began at 1:10 PM.

## 2. Old Business

### 2.1 Pending patron confirmation update

This is in regards to item 4.1 on the June 2022 EAC minutes. The language change was not made because there was no quorum at PLSDAC in September.

## 3. Updates from OWWL

### 3.1 owwl.org redesign

Kelsy reported that a final design of the home page of the owwl.org website was approved and the website redesign company is working on the design for internal pages. The final website will be a mix of the current owwl.org and pls-net.org websites.

### 3.2 OWWL Library System App

Most of the feedback on the app has been positive so far. Committee members commented on the ease of use. Dan clarified that the queue position on holds is not new to the app; this also shows up in the patron's account on the OPAC.

Next steps are: contact developer with feedback, and then a public release.

### 3.3 OPAC upgrade

Our current OPAC, TPAC, no longer receives updates. OWWL is looking at an OPAC replacement in the near future, which would be layered on top of Evergreen. Aspen, which is a spinoff of ViewFind, is currently used by about 800 libraries in the US and

also allows integration with OverDrive. This would happen in the first quarter of 2023. OWWL will produce training videos for patrons.

The committee agreed that communicating via email about this is fine.

### **3.4 Next Evergreen upgrade**

We will be upgrading to Evergreen version 3.9 or 3.10. (Right now, we are on version 3.7.) This would happen tentatively in the second quarter of 2023. This will be a major upgrade with big changes, especially to the holdings editor and the structure of patron notes/alerts/messages. OWWL will provide training prior to the upgrade.

## **4. New Business**

### **4.1 Guidelines for editing due dates**

Evergreen permissions may be being used inappropriately to edit item due dates, particularly for popular materials and other libraries' items.

Dan presented some data. Some committee members did not see a concern, given the small percentage of circulations, while others said they have seen this happening firsthand (with summer reading and story time materials). Some libraries have internal policies stating that they do not change due dates for materials from other libraries.

Kelly suggested changing the OWWL policy “editing due dates when a patron needs extra time” to remove the ambiguous “reasonable duration” and instead establishing a set amount of time. The new policy would read: “In order to provide good customer service, library staff may edit the due date of an item to provide extra time. The due date should not be extended beyond six weeks from the original due date without permission from the owning library. Do not use editing a due date to circumvent hold blocks, extend due dates on titles with holds, or prevent return of materials to the owning library.”

Dan will look into a report that directors could run to see items whose due dates have been extended at their own library. This would allow the directors to see if their staff are altering due dates, but would not allow them to view the same behavior at other libraries.

### **4.2 Softening the language on lost materials bills**

The language on the lost materials bill notice came across as harsh, so Margo and Dan came up with a different version.

The text can be customized to include notes such as “If you are experiencing extenuating circumstances, please contact \_\_\_\_\_.” Some directors were unaware that the notices can be customized, so Dan will mention it at the next PLSDAC.

The updated notice will be brought to PLSDAC for approval.

#### **4.3 Perpetual online patrons**

Some patrons may register online wanting a digital card, and they never come in to verify their account. Do we allow people to be perpetual online patrons? Do we change expiration date for longer than six months if they’re going to be perpetually online? Do we want a policy amendment to handle this situation?

There was a discussion of emailing licenses/mail to prove address, but many on the committee did not want to worry about being responsible for that information once it was transmitted to the library.

After a lengthy discussion, the committee decided to send this decision to PLSDAC.

Committee members expressed interest in a third-party service that would distribute digital cards to patrons who have no intention of using the services/materials at a physical location.

Dan said he would look into creating a new Evergreen patron profile that has an expiration of two years and the permissions of Online Patron.

#### **4.4 Permissions required for pre-cataloged checkouts**

All library staff members are currently able to create pre-cataloged (“pre-cat”) items. This leads to confusion and materials leaving the library without being properly checked out to a patron.

The committee agreed that the ability to create pre-cat items should be limited to Evergreen groups Circ II, Library Admin, and Item Cataloging. This recommendation will be presented to PLSDAC.

#### **4.5 Loan periods / overdue notices / autorenewals**

A member library director expressed concern about the amount of time that passes between the initial checkout of an item, overdue notices being sent, and items being marked lost. They requested that we rethink the overdue/lost notice cycle, and wondered if it is possible for only the first renewal to be auto-renewal.

Dan presented some data showing that on-time returns have increased to over 95% since 2019, which is likely due to auto-renewals.

The committee agreed that both auto-renewals be automatic, as having to manually renew an item the second time might be confusing to patrons and is a step back in terms of providing a service.

The committee also agreed that the auto-renewal policy should be system-wide and not customizable by any individual library, as this could cause confusion for patrons who use multiple libraries.

The EAC suggests that PLSDAC vote on the issue of auto-renewals at its next meeting so that a consensus can be officially and permanently reached.

In regard to overdue and lost items, an item is marked lost 9 weeks after the day it is due. Notices go out in the interim (7, 14, and 28-day emails, and physical overdue notices). In terms of length compared to other library systems in the state, OWWL's 9 weeks is longer than most.

The committee agreed that items should be marked lost 5 weeks after it is due, with notices being sent at 4 weeks overdue. This will go to PLSDAC for a vote.

#### **4.6 Schedule**

We switched the meeting schedule to the third Tuesday of every other month at 1pm so that Ron can attend.

#### **4.7 Cataloging Advanced Reader Copies (ARCs) and proofs**

Kathryn proposed that PLSDAC vote to amend OWWL policy to state that ARCs and proofs will not be cataloged, as they are almost always superseded by the official publication.

### **5. Next Meeting Date/Time**

December 20, 2022 at 1pm.

### **6. Adjourn**

The meeting adjourned at 3:52 PM.

Respectfully submitted,  
Kelsy Hibbard-Baker