Minutes of Evergreen Advisory Committee Meeting (DRAFT)

Via Zoom

Tuesday, October 17, 2023, at 1:00 PM

Committee Members Present: Margo Prak (Dansville/Livingston), Erin Robinson (Wadsworth/Livingston), Lisa Gricius (Warsaw/Wyoming), Kimberly Iraci (Williamson/Wayne), Jessica Winum (Geneva/Ontario)

Others Present: Dan Guarracino (Automation Librarian, OWWL), Ron Kirsop (Executive Director, OWWL), Kathryn Riedener (Collection & Resources Coordinator), OWWL)

Excused: Kelsy Hibbard-Baker (Technology Services Librarian, OWWL)

1. Call to Order

The meeting began at 1:10 pm

2. Updates and announcements
   2.1 Evergreen upgrade 11/2 (OWWL)

   Dan reported that the upgrade will occur overnight on 11/1/2023, with all staff seeing the brand new Evergreen on 11/2/2023.

   Further details on specific upgrade concerns will be addressed later in this meeting.

   2.2 Aspen upgrade

   Dan reported that this upgrade, coming later this year, features only small changes, and nothing major will change

   2.3 ILL updates

   Kathryn reported that OWWL has eliminated, and will no longer collect the $5.00 per request ILL fee. Libraries ceased being re-billed this charge after January 2023, according to Ron.

   Kathryn reported that the overdue fines ($1.00 per day) charged to out-of-system ILL items will also be eliminated

3. Old Business

   3.1 Hold cancellation notifications

Dan reported that testing of this notification did not work, and is still exploring other options

3.2 Cardholder restriction policy

Dan proposed a new policy to clarify that libraries are not able to restrict circulation of their items only to their own cardholders.

"Libraries should make items in their physical collection available to any OWWL cardholder in the same manner the items are available to the library's own cardholders. Libraries may restrict fragile, bulky, or irreplaceable items from being put in transit and may require that such items be checked out and returned only at their owning library."

After discussion, it was decided to add "or special circulation" to "fragile, bulky, or irreplaceable items" in order to accommodate items such as museum and park passes.

The proposed policy (with changes) now reads:

Libraries should make items in their physical collection available to any OWWL cardholder in the same manner the items are available to the library's own cardholders. Libraries may restrict fragile, bulky, irreplaceable, or special circulation items from being put in transit and may require that such items be checked out and returned only at their owning library.

This revised language policy will be presented at the next OWWLDAC meeting, December 1, 2023.

3.3 Deceased patrons

The procedure for identifying a patron as deceased, as proposed at the most recent OWWLDAC meeting, September 14, 2023, was met with concerns that the process was too cumbersome for library staff, and sent back to EAC for further discussion.

After considering the creation of a special patron profile, which led to other questions about how to manage reporting deceased patrons, purging their accounts, and proving that someone is actually deceased, the committee proposed that the procedure be simplified to marking the patron's account inactive, and adding an alert note, "Patron reported deceased" including library name, staff initials, and date. Libraries may still choose to use the procedure discussed at the most recent OWWLDAC meeting, which includes more thoroughly removing information from the patron's account by overwriting values with "deceased patron" and removing identifying details.

This recommended change to the deceased patron procedure will be presented at the next OWWLDAC meeting.

4. New Business

4.1 Evergreen upgrade

a) Dan reported that blocking a patron's account will be easier to do following the upgrade. After discussion, it was decided the best course of action was to keep an eye on how these blocks were used during the first few months following the upgrade. The committee believed that blocking should be a local library decision as the reasons for this block can vary from situation to situation.

The question was raised about staff being able to override a blocked account. Dan will investigate and report back his findings.

b) Option to change how hold preferences work when staff place holds for patrons

Dan explained that there is an option to change the default pickup location when staff place patron holds. Currently, the hold populates with a patron's default pickup location. This could be changed to the workstation library instead (ex. Staff at the X library placing the hold would see "X library" auto-populate as the pickup location rather than the patron's set preference). This would apply to staff-placed holds only; no change would be made to patron-set preferences.

After discussion, the committee proposes making the change so the hold form auto-populates with the workstation library's name. This change will be presented at the next OWWLDAC meeting.

c) Renewal date can extend loan time

Dan explained that following the upgrade, a renewal due date can be set from the original checkout due date. Currently, the renewal due date is based on the date of when the renewal is placed. Additional options to set a minimum amount of time before such a renewal can be placed are also available.

Discussion led to questions about the timing of auto-renewals, and language being added to due date reminder emails.

The committee suggested with the change in behavior in renewals, that perhaps an autorenewal attempt could be made on the same date that the due date reminder is sent and that a second autorenewal attempt could continue to be made on due dates.

The committee also suggested the addition of a statement about auto-renewals being added to the checkout receipt template to help clarify and remind patrons about the auto-renewal process.

Dan will test the new configuration prior to the next OWWLDAC meeting.

5. Evergreen TPAC sunset

Dan announced that the TPAC (old OPAC) will be sunsetting by the end of the year, so the only patron-facing catalog will be Aspen.

6. Patron registration form suggestions

6.1 DOB (Date of birth)

Dan reported that a suggestion was received by a library to make this field not required. Originally, this field had not been required, but with implementation of the online patron registration form, it then became a required field on the Evergreen patron registration form.

Committee members pointed out that some patrons may have the same names and addresses and that a birth year can sometimes be the only distinguishing factor. The committee recommends keeping the DOB field required for all libraries across the system, and not allow individual library configuration.

6.2 Hold notification defaults

Dan reported that a library requested that phone should no longer be a default contact method and that only email should be the default contact method.

After discussion, the committee recommended that hold notifications preferences default be changed to just email.

6.3 Email checkout receipts by default

Dan reported that a library requested that this change be made.

After discussion, the committee recommended that checkout receipts by email become the default rather than printing receipts.

6.4 "Originally registered at" stat cat: Do we will need this?

Dan reported a question about the necessity of this statistical category since most libraries are no longer maintaining physical registration forms.

After discussion, the committee recommended eliminating that statistical category from the patron registration form.

Dan noted that these changes will impact new registrants only and not existing patrons.

6.5 Physical form review (TABLED)

7. Patron self-registration suggestions

Dan reported that a library suggested the creation of a required question asking patrons to confirm their eligibility to apply for an OWWL card.

After discussion, the committee decided that adding an eligibility question would not be likely to alter patrons' behavior, and denied the request.

7. Hold shelf time: OK to adjust for libraries within policy limits?

Dan reported that a question had come in via ticket asking for an adjustment to extend the times items can spend on a library's holds shelf – currently 7-10 days. The library requested an extension to 10 days, and Dan accommodated this request.

After discussion, the committee agreed that these changes can be made on a library-by-library basis, provided that the total holds shelf time falls within the 7-10 day range.

8. Holds not being picked up on time

8.1 Add notice when being placed?

After discussion, the committee decided that no noticed need to be added when a hold was being placed.

8.2 Add language to hold notification email? Note about "7 days" is already in notification SMS.

After discussion, the committee approved adding this same language to the hold notification email.

8.3 Is this something you're noticing happening frequently?

Warrants further discussion at a later EAC meeting

9. Policy/process: Should circ policy updates require director approval/notification? This is currently an informal internal policy

Dan asked the committee if this information policy should become a formal one.

After discussion, the committee recommended that this become an actual policy, and that the director be allowed to appoint a designee if desired. Dan will draft the policy for EAC approval.

10. Hoopla and other third-party services

Dan reported that it is possible for individual library entry points in Aspen to include information about their third-party services, such as Hoopla.

After discussion, the committee agreed that this was acceptable.

11. Multifactor authentication for Evergreen staff logins

Dan reported that multifactor authentication is currently being developed for a future release of Evergreen. Other consortia funding development of this feature are seeking feedback. Ron explained that if a security technology is available, then because of insurance criteria, OWWL would have to adopt the practice.

Discussed ensued. Using work email + password is one method, but the committee expressed concern over the speed at which a code could be delivered via Zimbra. Pass key + password was also discussed.

No immediate changes will be implemented, but this change is likely to occur in the future.

12. Open floor: Discussions for items not on agenda

    No items were presented.

13. Next Meeting Date/Time

    Tuesday, December 19, 2023 at 1:00 PM on Zoom

14. Adjourn

    The meeting adjourned at 4:00 PM

Respectfully submitted,

Kathryn Riedener