

Minutes of Evergreen Advisory Committee Meeting

Via Zoom

Tuesday, April 16, 2024, at 1:00 PM

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

Others Present: Dan Guarracino (Automation Librarian, OWWL), Kathryn Riedener (Collection & Resource Coordinator, OWWL), Kelsy Hibbard-Baker (Technology Services Librarian, OWWL)

1. Call to Order

The meeting began at 1:01 PM.

2. Updates and Announcements

2.1 Small data discrepancy in renewals reported for 2023

Dan reported that some instances of patron renewals in Aspen did not attribute the circulation to the correct library. It is something to be aware of, but not anything to be concerned about. The issue was corrected as of the most recent Aspen upgrade.

3. Old Business

3.1 Welcome/HTML emails

Dan reported that progress is being made on the HTML welcome email for new patrons. There is more to be done with wording and design, but he showed a proof of concept.

3.2 Survey

We will revisit this at the June meeting.

4. New Business

4.1 Recommended processing schedule for reports

Dan and Kathryn came up with a processing schedule for Evergreen reports. The schedule includes: where to access the reports; when the reports should be run; actions to be taken with each report; and why it is important to take action on the report.

There is no real policy about reports. The committee came up with a policy and will take this to OWWLDAC.

The information from the report processing schedule will be added to OWWL Docs in table format. Tables in OWWL Docs can be easily copied and pasted into an Excel spreadsheet.

4.2 Expectations/policy for item and patron stat cats

There have been some issues with libraries not entering item stat cats. This causes issues with uncategorized circulations on the annual report, which can affect other libraries.

The bad stat cat report will be stressed when the report processing schedule is presented to OWWLDAC.

4.3 Process for dealing with deceased patrons' items

The committee discussed whether there should be a system-wide recommendation for dealing with deceased patrons' items, or if it should be a library-by-library decision. The committee agreed that it should be a library-by-library decision, but that having guidance on options (i.e., keeping items marked lost, marking as missing, or deleting the item) would be helpful. Guidance will be added to the OWWL Docs page about handling deceased patrons' accounts.

4.4 Overdue fine payments

The committee had a discussion about fine-free libraries either not collecting or forgiving fines accrued at libraries that are not fine-free. Ultimately, it was decided that a policy is needed. This will be brought to OWWLDAC for further discussion.

4.5 Patron registration form woes

A library reported regularly receiving pending patron submissions for expired cards. The library suggested adding "Do not use this form if your existing account has expired" to the patron registration form. However, the form already says, "Please use this form only if you do not have an OWWL library card."

Dan will add language to the form to hopefully make it clearer when the form should be used.

4.6 Deprecated item stat cats

OWWLAC previously suggested removing the Collection Development, Electronic File Format, Genre, and Physical Format statistical categories.

Another option is that libraries that do use the categories could continue to do so, while libraries that don't use them can mark them Not Applicable.

The committee agreed to keep these item stat cats for libraries that are still using them, but make it clear that they are not required.

4.7 Central Library hotspots circ policy

The committee discussed Geneva's new hotspot lending program; these hotspots would be holdable and able to go through delivery to patrons at other libraries. Ultimately, because a new circ policy is needed, it was decided that this will be presented to OWWLDAC.

4.8 New circulation modifier, associated circ policies, and Aspen

Aspen is not great about indicating holdability or respecting OPAC visibility.

Other Evergreen libraries have circ modifiers like “in-person loan” to indicate that an item isn’t holdable but that it can be checked out at the library.

Museum passes would be made universally unholdable.

Reference would be marked as “in-library use.”

Dan will present this to OWWLDAC.

4.9 Age-based hold protection

There is no indication in Aspen when items are being age-based hold protected. Some libraries have reported that their patrons miss this feature, as it gave them a better sense of when they could expect to receive the item.

Kathryn pointed out that age-based hold protection is a barrier to access for people who cannot drive or cannot afford to go to a library where an age-based protected item is available.

Dan presented data about age-based hold protection.

It would be possible to change age-based hold protection from two months to two weeks.

Dan said that the way holds work (prioritizing staying at the library where it is checked in) could be altered to instead prioritize the owning library or the next person in the queue regardless of the pickup library.

The committee discussed the pros and cons of age-based hold protection. Ultimately it was decided that EAC would recommend the following to OWWLAC: taking away age-based hold protection and altering Evergreen’s holds behavior to prioritize patrons at the owning library or the next person in the queue.

4.10 EAC membership

We are coming to the end of OWWLDAC terms. EAC members don’t have set terms or a limit to how long they can serve on the committee. Lisa suggested seeing if any of the new Wyoming county directors would be interested in joining EAC, and she would then step down.

4.11 Wording of Aspen e-book and downloadable audiobook buttons

In Aspen, e-books and downloadable audiobooks have a button that says “Check Out OverDrive” or “Place Hold OverDrive.” However, the OverDrive app has been discontinued

and patrons are now using Libby, which causes some confusion for patrons. Jessica asked if there was a way to change the button to say “Check Out Libby” or “Place Hold Libby.” Looking at Westchester Library System’s Aspen environment, it does seem possible.

There has been some discussion at OWWLHQ about rebranding the digital collection, so we will check in with Ron about this.

4. Next Meeting Date/Time

Tuesday, June 18, 2024 at 1:00 PM on Zoom

5. Adjourn

The meeting adjourned at 3:56 PM.

Respectfully submitted,
Kelsy Hibbard-Baker

DRAFT