PLS System Meeting – Summary
March 18, 2011
@ Pioneer Library System

Beth Gladding, **AHill**; Sue Reding, **ARC**; Nancy Burns, **ATT**; Jeanne Ruter, **AVO**; Laurie Newell, **BLO**; Diana Thorn, **BRI**; Renate Goff, **CAL**; Mary Ferris, Jenny Goodemote, Ron Kirsop, **CAN**; Erin Robinson, **CAS**; Melissa Correia, **CS**; Beth Horn, **GPL**; Cathy Allen, **LIM**; Theresa Streb, **LYO**; Darlene Virkler, **MAC**; Tracy Whitney, **MAR**; Blanche Warner, **NAP**: Elly Dawson, Peg Pelletier, **NEW**; Sandra Hylen, **ONT**; Patricia Baynes, **PAL**; Janet Rossman, **PER**; Deb Dennis, **PHE**; Allen Tompkins, **RC**; Andrea Tillinghast-Thompson, **RJ**; Donna Norris, **ROS**; Carol Garland, **SOD**; Angel Wright-Sackett, **SS**; Pat Evans, **VIC**; Sarah Matthews, **WADS**; Mary Zingerella, Liz O'Toole, **WAL**; Angela Gonzalez, **WAR**; Cheryl Gravelle, Michelle Byrne, **WIL**; Dottie Patt, **WOL**; Betsy Morris, Cindy Gardner, Ellen Reynolds, Bob Wicksall, Aaron Zsembery, Jim Frey, Heidi Jensen, Jeanne Hayes, **PLS**.

Birds of a Feather: Business & Company Resource Center **– 5 attendees**

Announcements
Betsy (PLS): ●Latest on construction grants for 2010: awards yet to be announced; grants still at DASNY (Dormitory Authority of the State of NY) awaiting resolution of problems with a couple of applications (not ours)

●OWWL2go business-sized cards ordered and arrived! Handing out bundle of 100 to each library and the others being sent in maroon delivery envelopes. Contact Betsy or Jeanne if need more.

Ellen (PLS): ●Summer Reading posters here, please take yours to avoid sending in delivery where they can get crushed.

● Posters available from Touchpoints Marketing project. Please take and place throughout your community. [Betsy loves seeing them around Williamson, warms her heart.]

●At the last WFL SLS council mtg, Ellen gave a presentation & fielded many questions about OWWL2go. One person there shared that her father needed help downloading materials on his iPad. Clyde library staff showed how to use and GPL helped him getting more titles on it. Patrons very thankful for libraries help.

● Group order: *The Way it Was According to Some Savvy Settlers* by Donald Kneeland. Part of the series A Spirited Tour of the Finger Lakes and Western New York: How things got to be the way they are. This has profiles of Col. Nathaniel Rochester, Ebenezer Allan, Benjamin Patterson, and General John Swift. Approx. $14. paperback. Respond to Kathryn by 3/30.

Cindy (PLS): Two annual reports remaining to be submitted. Reminder: County Grants for those counties, Ontario and Wyoming, cannot be distributed. Need info from completed annual reports to figure in the grant distribution formula.

● Good news: 2010 State Aid is coming in. May be able to get 2010 LLS $ out soon.

Bob (PLS): Equinox addressed response time issues and things seem to be better. Ran some tests and was able to complete a task in 2 min. that previously had been taking 16 min.

Beth (GPL-Central Library): Applications for Librarian I and Librarian II civil service exams - Apr 6 deadline. These are not traditional *exams*; they ask for education experience and training.

Beth and Wendy were on the road doing OWWL2go training. They bring laptop and computer, just need your library to provide project space. Give Beth a call if you'd like training for your staff.

Heidi (PLS): New way of handling examination books on system meeting days. Several people were not able to look the books over before or during the meeting. The books will be left out until after people are done looking and Heidi will put them into delivery.

NYSLAA (NYS Library Assistants Assoc.) conference in Geneseo this summer. See http://www.nyslaa.org/

NYS Assistants Day is April 14 and ALAs National Library Workers Day is Apr 12.

Cathy (LIM): Reception at Lima 3/23 @ 7pm to honor long-time trustee Pradeep Jangbari, 20 years. He was also a PLS trustee.

Ellen (PLS): Re: Harper Collins and their new business model for licensing to libraries—26 checkouts and title will disappear. The library needs to buy another, albeit at a reduced price. (likened to paperback price vs. original hard cover) PLEASE fill in survey that Ellen sent out. Would like to have full representation in making decision to boycott Harper Collins.

Now when ordering through OverDrive, there is a separate section in Content Reserve listing HarperCollins titles. Titles now have to be ordered separately as they have different licensing.

Discussion:

- Harper Collins survey, so far 25 responses, only 1 for not boycotting
- There are some publishers who do not make ebooks available to libraries at the same time the hardcover is released.
- Regarding digital content, lot of rethinking needed on the part of publishers and libraries before access decisions are made that impact future models
- ~20% of OWWL2go are currently Harper Collins titles
- ~ 5 are bestsellers
- 26 checkouts can equal 6mos if borrowed at 7 day loan, about 18 mos. if borrowed at 3 wk loan
- Each OWWL2go format [ePUB, MP3, PDF, WMA] of a title is a separate purchase, just as one copy is a separate purchase when buying a hardcover, ppbk, and CD audio.

Book Cart Drawing: Libraries who sent at least one representative to Advocacy Day Mar 1, were entered in a drawing for one of 3 book carts.

Winners: Wadsworth, Victor, Dansville.

Program
Reporting on Reports

Facilitator: Betsy Morris

Panel of experts: Bob Wicksall, Aaron Zsembery, Jim Frey, Ellen Reynolds

Program demonstrated existing reports, what's in development, and gave attendees a chance to discuss future reporting ideas. Discussed why reports are needed, what data should and can be collected.

Handouts: Documents for Reports System Meeting, March 18, 2011

See links on system meeting Twiki page:
http://plum.pls-net.org/twiki/bin/view/Members/Meetings/SystemMeeting20110318

Collection Analysis of OWWL2go 2011 Year to Date [*Correction: Palmyra has pledged for 2011*]

Posted on wall: Complex schematic of Tables in Equinox database with lines showing links to other tables.

Highlights:

- Running reports can eat up processing time that can effect what you are doing at the libraries so simplifying / streamlining reports is necessary.
- Library input in reports process helps standardize reports to serve library needs and PLS is an efficient way to move data to libraries
- Global fixes will be used when possible
- **Keep sending report ideas to PLS and keep asking about possibilities; lots in development**
- Bob is working on a web tool—building an interface to browse some reports—one-stop shopping of some current and archived reports—will easily allow libraries to access some reports as needed; and eventually fewer reports will be emailed
- See System Meeting Twiki link of tips for reports: http://plum.pls-net.org/twiki/bin/view/Members/ReportsSystemMeeting20110318

- Evergreen has some reports built in, e.g. Cash Report- Work payment is pass thru, passing $ to other libraries
- Customized pull list – Sitka (British Columbia) consortium using EG has documented how to use an alternative pull list. Ontario Library has tried and it works for them. Contact Betsy or Lindsay for more info.
- Monthly circ overview report (monthly totals differ from annual report figures because the annual report asks different questions). Monthly circ report will be revised—2 columns added in-house circ and ephemerals. This report does not include OWWL2go
  - Libraries can manipulate the spreadsheet to delete columns and retotal as desired
  - Helps with management decisions
  - Adding monthlies won't match annual report data
- Lots to be developed in EG environment. Workflows custom reports, which took years to develop, used 3 different servers. Merging data from 2 system and working to build an efficient reporting system will take a bit of time. Eventually libraries will be able to get yearly comparisons, 2011 vs. 2012.
- New users report: if 3 sets of #s don't add up, contact Aaron. Eventually a report will be developed with a tab for summary and a detail tab to determine which records need to be corrected
- Hi System Demand report - instructions on Twiki
  - Is emailed to directors each week
  - For collection development purposes
  - Building cooperative collection development among libraries
  - Please note 2 tabs on report: High Local Demand and High System Demand
  - Can sort report in excel
  - Ratio column on the High System Demand report: the lower the number, the bigger the need for more copies, ratio of less than 16% is good indication of need based on the rule of thumb: 5 copies per hold
- Overdues report created by Equinox
  - Overdue mailers are for lost or overdue materials at intervals of 2 wks, 4 wks, 6wks
  - Bill notices are pdfs that the libraries print out
  - Mailers can be viewed in Mailers folder at the bottom of the library folders from the Overdues link in the staff client
  - **discussion on overdue shelf list report:**
    - Need to add 1 week so notice covers the full 6 weeks
    - Need to add patron barcode
    - Will investigate OD shelflists for my item checked out at another LIB and about to be billed
- Pending - List Item by copy status report – see Twiki
  - Reports used by libraries to decide whether or not to replace an item
  - This report lists everything NOT in a normal copy status: ILL, catalog, weed, lost, damaged, missing, in process, bindery, repair, stacks (is a bad location), discard
  - Eventually this report will be on the web interface and libraries can retrieve

Reports in development

- Clean holds shelf report
  - After 7 days on the shelf, item need to get back into circulation
- Bad" reports: monthly – shows incorrect info or missing info of patrons; very helpful for staff training

Other Reports

- Wireless Statistics – easy to use report. Choose from 4 categories: wireless connectivity; real time session; stats monthly; stats yearly.
  - This info will be in the budget kits. Is not a number state asks on the annual report. Betsy will ask about that at PULISDO.
  - Low numbers may indicate unit is in a bad part of the building.

- Other=library card user
- Shows time of day wireless is used
- Shows # of people logged on; amount of data downloaded; how long stayed on
- Ellen's quarterly OWWL2go collection analysis reports. This shows that too much of the collection is unavailable because it is checked out and has holds. 59% of the eBook collection was in circulation on the day the statistics were drawn which meant that few titles were available to browsers. 34% of the whole collection was in circ. The ideal is 20%. Audiobooks are still circulating heavily, as well as eBooks.

Other Discussion Items
- New Circ modifiers being considered (video game, software) that are more intuitive to use
- Last Copy report – hope to automate the process so libraries will not have to alert cataloging when they remove the last copy. For now, continue to use the form and send to Kathryn with title control #.

Dream Reports
- Collection development and weeding reports
  - PLS investigating using SUNY Geneseo *GIST Gift* and Deselection Manager tool for this
- Top circ days & hours – will help with staffing decisions and comparative time frames for current year and past year
- Easy way to get author/title lists