Evergreen Indiana Circulation Committee Meeting Minutes

January 17, 2012

Voting members present: Jill Scarborough, Judi Terpening, Shawn Heaton, Chase Martin, Karen Jewel, Virginia Jensen, Sheryl Sollars, Teresa Hudson, April Gross, Shawn Parker

Members not present: Christina Hime, Rose Bryan

Non-Voting Members present: Shauna Borger, Megan Maurer

10:05 AM, meeting called to order.

Approval of Agenda

Agenda approval with no additions. Motion by Shawn Heaton, seconded by Chase Martin. Motion carries.

Introduction of two new members: Judi Terpening from Switzerland County PL, and April Gross from Fulton County Public Library.

Minutes from November 10, 2011 meeting approved. Motion by Sheryl Sollars, seconded by Virginia Jenson. Motion carries.

Committee Reports

Indiana State Library (reported by Shauna Borger)

Blue Reciprocal Borrower cards

Initial orders placed by the Indiana State Library. Most were delivered before the end of 2012. Moving forward, you will order blue cards just the same as you currently order green cards. Evergreen Indiana Coordinator will send an email to Circ support list serve with a link to a survey for item, blue and green barcodes. You can place orders by filling out the survey.

Payment Pilot and Documentation

Evergreen Indiana Coordinator mailed out draft documentation for the payment pilot. Target date for implementation of cash and check payments might be as soon as this summer but more likely sometime in late 2012. Virginia Jensen commented that her patrons have been asking about it and are very much looking forward to being able to pay their fines at any EI library. She asked if there was anything the libraries can do to prepare. EI Coordinator recommended that each library pass the board resolution to establish a Pass Through Fund.

Acquisitions

The acquisitions pilot is taking a new approach to using the acquisitions module. King county documentation is what we've been using. This documentation differs from what Evergreen Indiana libraries want from the acquisitions module. Our libraries want to start in the vendor website, create their cart, download the cart to their workstation, upload the items to EI and create a purchase order from there.

Updating Staff Training Page

It is now broken up into sections: Circ module, cat module, local admin module, reports module. Advanced Circulation Training   - Finalized list of what they are talking about, but not cast in stone. EI Coordinator will send out the list to the committee for their feedback.

Old Business

New Circ Committee Members Approved by Executive Committee.

Regional Circulation Training approved by Executive Committee.Now that we have more libraries, it is more difficult to schedule training at ISL and also in the field. More Libraries want training closer than Indy for various reasons. Indy is in middle of state. Still offering training at ISL but ISL is also interested in gauging interest in volunteer trainers for Train the Trainer sessions in addition to scheduling training out in the field. If you are interested, you must work out what your library will reimburse for gas mileage, etc. ISL will not reimburse for that. ISL will be looking for member libraries who could host training classes. They are a minimum of 2 hrs, circ is 4 hrs admin +reports 2 hrs. Facility needs computers. Sixteen is a good start. Need a dedicated space for classes. Jessica sent an email with a list of facility requirements. Trainers would go to ISL and be trained, then sent on your own to go out and train. Talk to other member libraries about the consortium. Anyone interested in hosting a train the trainer session , talk to your library, let ISL know. The location of advanced cataloging training sessions revolves around new libraries joining the consortium but the advanced circulation training will probably be scheduled differently.

Fulton County may be gaining 10 new computers in April so they may be a possible training location. Discussion began about staff training days a various libraries and Jill Scarbrough wonders if we could incorporate training into circulation committee meetings. Megan Maurer states that the training is an all-day affair. Scarbrough suggests having lunch brought in if the training will take all day.

Policy and Procedure updates approved by EC

- o   Delete patron permission has been assigned to Circ1, should be available now.

- o Transiting lost items has been added to instructions
- o Updating card accounts, page 7

Shawn Parker discussed the amount of time that passes between when a lost item is turned back in and when it finally gets back to the owning library. During that time, a patron could be reported to collections, etc. At the last committee meeting, the circ committee discussed adding alert to patron account in addition to adding an alert to the item record. The circ committee decided against this as it would add one more note that would become outdated if staff members didn't remember to delete the alert. The wording on the lost notices is problematic because it asks for the patron to send the material back to the library and not all libraries accept lost items.

Returning a book that was lost, needs to be handled by owning library. The burden should be placed on the patron to get in contact with the owning library. Bottom line is: Staff members must contact owning library before forgiving any lost or damaged fines.

There was a discussion about the way the system handles lost items that are checked in and a suggestion was made that perhaps another status could be assigned and used: Lost Item in Transit. Basically, the owning library needs an alert on the item that indicates that the item was lost and then checked in for transit.

NEW BUSINESS

E-mail bounce backs

Suggestions for how to tame the e-mail bounce backs. Some libraries have their bounce-backs divert to spam, junk mail. Also, if an incorrect email address is found, enter an alert in the patron account which includes the incorrect email address so you can double-check what the patron tells you. Consider adding this suggestion to the Weekly Update blog.

When to pull holds

Kelly Ehinger survey conducted a survey about whether we should have consortium guidelines for when different sized-libraries should pull their holds. Once a day is all that is suggested in the procedures. Committee felt that it was adequate since many libraries already pull holds more than once a day.

Updating Circulation Manual

ISL continues to update the circulation manual with new screenshots.

Upcoming Migration

April 11, Akron Carnegie Public Library, Camden-Jackson Township PL, Montezuma PL will be migrating.

Circulation Committee meetings for 2012

Jill Scarbrough discussed the schedule for the circ committee in 2012. 3rd Tuesday of the meeting month: March 20, June 19, September 18, December 18.

Shawn Parker asked about grouping patrons on the staff side and what that looks like on the patron side. A patron requested that they as a parent have one login to access all of their children's library accounts. Chase Martin said some libraries used Library ELF because of confidentiality concerns libraries would have about providing this information directly.

When do fines keep patrons from using a computer? Evergreen automatically blocks a patron who owes offer $10 from using computers if their computer login software is linked to Evergreen. One suggestion is to have a couple terminals have a 15 minute cap that patrons can use without signing in.

Jill Scarbrough asked whether the system reassigns the due date for an item based on whether the patron account will expire during the potential circulation period for the item.

There was discussion about the shortnames with Newton County Public Library. They do not seem to share any beginning numbers and that makes it difficult when preparing items for transit. Shauna will look into this.

Sheryl Sollars asked whether the system has been emailing patrons whose accounts are about to expire. Shauna will look into this.

Jill Scarbrough reports that some of her expired patrons can still access Overdrive. Shauna Borger suggested that she look at the cards that she configured as "good" and "bad" for OverDrive and find out whether any of the "bad" cards are expired which would have the system set up to deny expired patrons access to OverDrive.

Why do gray records display in the catalog in a specific library search? Shauna will follow-up.

Motion to adjourn from Judi Terpening. Karen Jewel second. Meeting adjourned at 11:41am.