

OWLSnet
Administrative Advisory Committee Meeting
Outagamie Waupaca Library System
(Online – GoToMeeting) July 15, 2022

Present: Nicole Casner (online), Tasha Saeker (online), Owen Anderson (online), Appleton; Rachel Hitt (online), Black Creek; Jamie Hein, Clintonville; Rebecca Buchmann (online), Morgan Mann (online), Dawn Taylor (online), Dominic Frandrup (online), Shauwn Rosendale (online), Door County; Steph Weber (online), Florence; Shannon Stoner (online), Gillett; Robyn Grove (online), Iola; Ashley, Kaukauna; Carol Petrina, Kewaunee; Holly Selwitschka (online), Kimberly; Michelle Best, Katherine Freund, Little Chute; Ellen Connor (online), Lyn Hokenstad (online), Manawa; Amy Commers (online), Karin Adams, Marinette County; Ann Hunt, New London; Lori Baumgart (online), John Kronenburg (online), Tracy Vreeke, NFLS; Kristin Laufenberg (online), Oconto; Amy Peterson (online), Oconto Falls; Kim Cackowski, Veronica Pigman, ONE; Amanda Lee, Bradley Shipp, Liz Kauth (online), Molly Komp (online), Chad Glamann (online), John Wisneski (online), Debbie White (online), OWLS; Sue Vater Olsen (online), Scandinavia; Elizabeth Timmins, Seymour; Mikki Moesch, Shawano County (online); Shay Foxenberg (online); Shiocton; Jill Trochta (online), Suring; Patsy Servey, Waupaca; Kelly Kneisler (online), Weyauwega

1. Call to Order and Introductions

The meeting was called to order at 9:34 AM and Amanda went through roll call.

2. AAC Ground Rules & online meeting etiquette

3. Minutes of the May 20, 2022, AAC meeting were approved.

4. Announcements

- a. Welcome Dominic Frandrup, the new Director of Door County.
- b. Eric Baily will be the new Waupaca Director. He starts August 1st.
- c. Katie Esserman will be the new Lakewood Director. She starts July 18th. Nicole has retired.
- d. Kristin from OCO will be joining OWLS as the new Consulting & Outreach Librarian starting August 15th.

5. Damaged Materials

Molly addressed the group on how she's received more complaints about damaged items. Thank you to those who gave their input through email discussions. Through these discussions, she realizes that the complaints typically involve noting the damage and how to measure the damage. Here are the points that stood out:

- Minor damage calls for a yellow slip and still circulating the item. Minor damage may be stains, writing/markings, or ripped page(s) that are still readable. If the damage is minor, libraries still want the circs for the item.
- A yellow slip doesn't always mean an item is unfit to circ—it's just a way to communicate to owning library; it seems most are using the yellow slips similarly.
- Items unfit to circulate could include: wet and/or muddy items (typically from delivery), pages falling out/split bindings, broken pieces/parts, missing pieces (discs, games, etc), or badly scratched discs or cracked discs.
- It was suggested we create another colored slip in addition to the yellow slip; maybe RED for un-circable damaged items.
- Libraries should not check in damaged items if there is significant damage or no note indicating the damage.
- If an item is brand new and there is damage, contact the owning library to ask if they would like the item sent back.
- Some have found items still circulating even with multiple yellow slips.
- Calling each patron who had the item to see if they caused the damage is not great customer service.

OWLS can't necessarily change the Damaged Items procedure in terms of CARL, the functionality in CARL isn't there yet for what we want it to do, but we can certainly look at it in terms of defining damage and how to proceed with problem slips and when to circ or send back. This is what we're hoping a committee could do.

Molly asked the following questions:

1. What do you consider damage? Circable vs non-circable?
2. What are the major issues you're seeing right now?
3. Does the lost and Damaged Item Procedure need to be revised?
4. Who would be willing to participate in a committee to review and revise the current procedure?

Many shared what they considered damaged at their libraries and provided recent examples and situations. Extensive discussion indicates a lack of consensus on what constitutes "damage."

Staff do not have time to call the owning library for a decision every time. Issues occur when items continue to circ with problem slips, but this happens when there are a lot of holds and the circ'ing library thinks the item is still usable.

When patrons are billed by a library other than their home location, they are confused and/or upset, because they have no idea why.

The paper problem slips get lost while the patron has the item, so detailing the damage in the item record should be utilized more.

Standardizing practices could help, but each library has their own budgets to consider when it comes to deciding what is still in circ'able condition.

Currently lost and damaged items are all billed as lost. There is an existing development request with TLC to distinguish between the two. While we wait for that functionality to become available, we need to update and improve our procedures.

There was suggestion of differentiating Problem and Damaged slips; two different colors and levels. Note: If colors are used to distinguish slips, consider those who might be color blind.

It was decided that a committee would be formed, and volunteers include: Katie (ALG), Kristin (OCO/OWLS), Elizabeth (SEY), Ashley (KAU), Katherine & Michelle (LIT), Ann (NLP), Jan (WAU), Shannon (GIL), Morgan (Door), and Undetermined Staff Member (APL).

Molly will send out an email with a Doodle Poll to the volunteers for possible meeting dates.

6. Introduce new training initiative

OWLSnet is committed to offering a high level of service to all our member libraries and recognizes training is an opportunity we could improve and use to build relationships. OWLS currently offers in-person or remote training for circulation and cataloging, documentation on our website, we've hosted CARL Conversations and posted the videos and FAQs on the website, and have an email list for updates.

In addition to these resources, OWLSnet proposes updating training to incorporate an in-person component in which OWLS staff can be present during a shift to answer questions that come up during day-to-day activities. Feedback we received has indicated that people would like to have more real-world scenarios and experience. This is difficult to do with our current training, so we'd like to offer this option for staff who learn better through doing.

With increased turnover, it would be helpful to have a designated library trainer and have OWLS create a train-the-trainer option. New staff are more inclined to go to someone within their library when questions come up, rather than reach out to OWLS.

Amanda will send out a survey that asks if anyone is interested, what days of the week work best, and whether morning or afternoon is better.

7. Vote to implement Capira as the InfoSoup app

In March it was decided that the 2022 system development plan should be to implement an app. A committee was formed to participate in demos, identify criteria and desired features, evaluate products, and analyze costs. More information on the method and features were outlined in the recommendation sent out. To summarize, two products stood out: myLIBRO and Capira. Both scored about the same in the evaluations, but Capira was the more affordable option. Appleton currently uses Capira and their app can be linked to an InfoSoup app, which was also a consideration.

Should OWLSnet implement the Capira app as the system development project of 2022?

There were no questions or concerns prior to voting. Vote was in favor of implementing the Capira app. OWLS will sign the contract and get the process going. Tentative timeline is in the document Amanda shared prior to the meeting.

8. Resource Sharing

Resource Sharing is core to OWLSnet's mission. With a lot of new directors out there, Amanda wanted to make everyone aware of the resource sharing policy, show where statistics are posted that show how much everyone is sharing, and how to read those stats.

The [Resource Sharing Policy](#), posted on the Policies and Procedures page, states the goals, standard practice, and consequences of deviating from the standard practice. The goals are to encourage libraries to develop physical collections to serve their communities, have all their holdings included in CARL, lend all circulating materials with other libraries (except those outlined as approved exceptions), allow OWLSnet residents the same opportunity to access resources, and to increase standardization among member libraries to reduce the need for patrons and libraries to learn different variations of practices. The policy covers hold prioritization, picklists, how to handle items with holds, short loan, and lucky day.

OWLSnet provides monthly statistics for interlibrary loan among OWLSnet libraries. This is for physical items only and outlines how much is lent and borrowed by each library. It can be found at owlsnet.org/owlsnet/stats under "Interlibrary loan lender/borrower statistics" to see branch information, or "Interlibrary loan stats consolidated by library" to view by library. The ratio is the number of items loaned for every item borrowed. Ideally, the ratio will be around 1, which means you're lending just as much as you're borrowing. If you're higher than 1, that means you lend more than you borrow, and if you're under 1 you borrow more than you lend.

Under Mutual Understandings in the OWLSnet Agreements, it states: All libraries participating in OWLSnet have a responsibility to develop their local materials collections to support the basic needs of their patrons. It is unfair for libraries to rely primarily on other members of the network to meet their patrons' basic needs.

OWLS knows that CARL's routing is too dynamic for our needs. It isn't giving libraries much of a chance to pull holds available at their location. Our number one development priority with TLC is to give the pickup location 24 hours to pull holds before it moves on to another pick list. Amanda will be meeting with TLC in the next week or so to go over our development requests and let you know if they have any suggestions for what can be done in the meantime.

Appleton's closure and being in a temp location have thrown off the numbers for some neighboring libraries. Ashley from Kaukauna is aware of the low ratio and slowly making progress with their budget. Others are in the same situation. None of the OWLSnet libraries are deliberately violating the resource sharing policy.

CARL's system for pick lists, is, whoever runs the list first and has the item on their shelf will get the item on their pick list. It does not account for geography, just if it's available and who is running the list. The standard/minimum of running the list is once per day.

Amanda will send out a document that show pre-COVID ILL stats side by side with the current year.

Discussion on what staff like and dislike about CARL ensued. Here are the main points taken from that discussion.

Load time with patron records and overall slowdowns are causing frustration. When staff run into slow load times, please share this data in the spreadsheet Molly shared. OWLS will also investigate whether we can adjust bandwidth allocations with Dave when he is back.

Staff are still confused as to which platform to use and when (Client CARL-X vs. Connect). It seems that most are using Connect for patron related tasks and CARL-X for check-in and checkout.

CARL-X appears to print receipts faster and more clearly, as opposed to Connect which can't hold the preferred printer settings because it is browser-based.

The holds routing is too dynamic, which results in items traveling even when the pick-up library has the item on the shelf. This is our top development priority with TLC; development for a 24-hour window where the hold goes on the pick-up library's paging list first.

Every time an item record is touched it updates the Last Circulation Date, which makes weeding lists misleading. There is a request in to develop two separate dates with the item record to have a Last Circulation Date (that only looks at the circulation of the item) and then the Last Update Date (for when an item is edited or a status change has been made).

Bibliotheca self-check machines allow patrons to check out other peoples' holds. Envisionware's self-checks do not allow patrons to check out another patron's holds. Please notify OWLSnet Help if you are having this problem with your self-checks.

Reprinting a receipt or printing receipts after staff clicked "Don't print receipt" is not currently an option once a transaction has been made. Staff can go into Connect under Loans, and can choose to print a patron's history. But when it comes to paid bills, staff can't print this after the fact.

Billing, negotiation and re-negotiation process is too convoluted. Libraries just eat the cost when staff can't figure this out.

Patrons are receiving hold notifications, but their hold is not there, or arrives the following day. Please send in barcodes to OWLSnet Help when this happens. OWLS staff can check the CARL transactions log to figure out what happened. OWLS staff have typically found that the notice was generated correctly, but then something happened to re-route the item/hold. More data would help identify a pattern if there is one.

9. Adjourn at 11:58 am