OWLSnet
Administrative Advisory Committee Meeting
Outagamie Waupaca Library System
(Online – GoToMeeting) March 18, 2022

Present: Cathy Kolbeck, Algoma; Nicole Casner, Tasha Saeker, Owen Anderson, Appleton; Rachel Hitt, Black Creek; Jamie Hein, Clintonville; Rebecca Buchmann, Dawn Taylor, Morgan Mann, Shauwn Rosendale, Door County; Shannon Stoner, Gillett; Allie Krause, Hortonville; Ashley Thiem-Menning, Angela Schneider, Kaukauna; Carol Petrina, Kewaunee; Nicole Lowery, Lakewood; Michelle Best, Katherine Freund, Little Chute; Rachel Pascoe, Lena; Ellen Connor, Lyn Hokenstad, Manawa; Karin Adams, Marinette County; LeAnn Hopp, Marion; Ann Hunt, New London; Lori Baumgart, John Kronenburg, Tracy Vreeke, NFLS; Kristin Laufenberg, Oconto; Amy Peterson, Oconto Falls; Amanda Lee, Bradley Shipps, Liz Kauth, Molly Komp, Dave Bacon, Chad Glamann, Joe Lawton, OWLS; Sue Vater Olsen, Scandinavia; Elizabeth Timmins, Seymour; Kristie Hauer, Shawano County; Shay Foxenberg; Shiocton; Jill Trochta, Suring; Patsy Servey, Waupaca; Kelly Kneisler, Weyauwega

1. **Call to Order and Introductions**

   The meeting was called to order at 9:30 AM and Amanda went through roll call.

2. **AAC Ground Rules & online meeting etiquette**
3. **Minutes of the January 21, 2021, AAC meeting were approved.**

   Amanda announced a sentence under "Discuss increasing the checkout limit to 150" will be struck from the minutes. We said "Karin asked how often does it happen when staff don't know they're getting a hold from a library with a lower limit? Ann answered that it probably doesn't happen so much now because of the fairly standard settings, but if the limit is raised then it could be. Some said they would start placing item level holds at that point." We will delete "Some said they would start placing item level holds at that point." Amanda believes we misrepresented what was said in this case as placing item level holds would directly violate the Resource Sharing Policy. She doesn't think anyone is placing item-level holds for reasons other than recalling a defective item or other internal purposes, nor is anyone intending to start.

   There were no questions or additional suggestions for changes. Minutes were approved and will be updated and posted.

4. **Announcements**
   a. Rachel Pascoe is the new director at Lena. Welcome Rachel!
   b. Door County has a new Head of Circulation: Morgan Mann. Welcome Morgan!
   c. Rebecca B. is the interim director of Door County until they hire a new director.
   d. Joe Lawton is the new computer technician for OWLS and NFLS. Welcome!

e. The May AAC meeting will have an in-person option at the Little Chute Library.

f. Tracy thanked OWLS and Dave for their work during the move.

g. Liz announced that libraries should stop using the old OWLS/Appleton combined tub tags. OWLS and APL are now in two different locations, each location gets a separate delivery. For out-of-system ILL items, OWLS libraries should use the orange new ILL tags that only have OWLS on them not OWLS (Appleton.)

5. **APL Move**

Tasha updated the group with hard dates and more concise information about the APL move. The library will be closing Wednesday, April 13th, and the expected length of closure is 6 weeks. They expect to reopen May 23rd. They are moving to the old Best Buy building on the southeast side of Appleton off Kensington. Currently staff are working on stickering items for the moving company. Because there will be less space, and the current building has been occupied for 40 years, there is a lot of stuff that will not be coming to the new building and will be auctioned off. The closed dates have been entered into CARL and ILL will be stopped at the end of this March. The last WALTCO delivery will be April 11th, and the last pickup will be April 12th. While closed, the network will need to be moved to the Kensington location early on, so there won't be any internet access during that time. The move itself will take 3 weeks. At the end of the closure, staff will work on filling title paging requests and working through the tubs stored by WALTCO. Because temp space will be a lot smaller, there will be fewer public computers, one circ desk, and many staff will be working from home. Phone coverage will be limited but staff will answer as they can; City Hall will also be fielding calls. If you would like to follow along with this process or are looking for more information, you can access if here: apl.org/building.

6. **ARPA IT Hardware Improvements and Upgrades**

DPI has not been able to open the ARPA grant form application yet. OWLS and NFLS will apply together. The total grant amount is between $50K-$60K. OWLSnet plans to use the grant money for new hardware purchases, especially for older equipment that is coming up on 10 years old. Every year OWLS replaces a few but with this money a larger chunk can be taken care of. Once the application opens and the budget is approved, Bradley will send out an email and let libraries know how many access points they will receive.

The grant period ends June 30th.

7. **Present System Development Plan options**

The three options for the System Development Plan this year are a data dashboard, address verification, and a catalog app. With the information provided by Amanda and

email discussion, many felt that the catalog app would be most beneficial from a patron perspective.

Some questions that came from the email discussions:

For address verification, it sounds like patrons would need to be registered twice.

No, this is not the case. All registrations would need to happen online, including those registrations within the library, which would then be uploaded automatically to CARL. If a patron needs to renew or change their address or other information, staff would do that in CARL.

Would it be possible for the software to run periodic audits on our patron database or run our database through the software in bulk? No, the software checks the address and name at the time of registration but cannot do so after the fact. There are change of address services out there that we can investigate to do this work.

How high of an error rate do we have with the current method for address verification? It depends on the library. OWLS will work with libraries on municipality audits where we check a sample of the records to see if the correct municipality is assigned for the address. If the error rate is high, the library does extensive cleaning up of their records. This past year we have seen an increase in patrons who have "unassigned" or no municipality. Those circs count as resident circs, so those libraries could be leaving money on the table if they were nonresidents.

For data dashboard, can they sign us on as a test client with reduced pricing? Yes, we can get a discount as an early adopter.

Ellen asked if there are any issues with patron data confidentiality with using a separate product for patron registration? Amanda answered that there would not be because they don't store the data themselves. Are there other CARL users that already use the address verification product and has it gone well? Amanda said yes, there are other CARL libraries using the product, and it is working well for them.

The myLIBRO app pricing is around $22,000 for initial set-up and then an additional $20,000 a year, totaling $44,000 for year one. The BiblioCommon app is $11,000 annual with $3,600 setup cost.

Bradley asked if, for those where the app is the first choice, is it for the catalog or to have the local customization? What are we getting that we don't already have for that money?

A lot liked the idea of customization and adding events and social media on the app. But Bradley noted that if everyone is most interested in customization, that cannot be done in one app—each library would need to administer their own app for that customization. It would then be a local purchase. The setup cost for myLIBRO is $750

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per library. The myLIBRO app could do the individual customization; the BiblioCommons app cannot.

If there is not a cost savings from purchasing the app as a group then it's not useful as an OWLSnet project, some thought. Amanda added that there would be savings for purchasing as a group, but as Bradley mentioned the libraries would have to maintain their own apps so OWLS would just be getting it connected. It is expensive for $20,000 a year and would be a factor in OWLSnet fees. Another benefit for purchasing as a group would be if there was an issue, it would be easier to troubleshoot instead of trying to figure out multiple app products.

Ellen asked how this option ended up on the list if it is so complicated? Bradley answered that an app has been on the radar for some time now, and libraries have asked for it to be considered this year.

The majority were in favor of the catalog app. Tasha added that Appleton is not sure what they will do, since they already have their own app set up. They would need to see all the information from all options before deciding.

Amanda will share the demo videos with the group once she gets them and start forming a committee to look more at the app options and firm pricing.

8. **Discuss increasing checkout limit to 150**

The proposal under consideration is whether OWLSnet should raise the maximum checkout limit to 150 items with caps on certain materials outlined below. Libraries may choose to set limits lower than these maximum numbers.

- Print materials: 150
- Media: 50
    - (Audiobooks, Music CDs, Videos, Videogames, Playaways)
- In house circ, laptops, musical instruments, passes, hotspots: 1
- Everything else: 150

Amanda reviewed the last meeting's discussion and reminded everyone how limits work in CARL. She also mentioned that 17 patrons have 25 or more media items checked out, since that was asked last time.

Patsy asked how the new limits would impact overdues and billing. Amanda said she doesn't imagine many patrons would take advantage of the higher limits and that it would mostly be for teachers and home schoolers. She believes from feedback that teachers and home schoolers don't lose a lot of things.

Kristin doesn't feel it's necessary to increase the limits since it does not affect many patrons. She almost never sees patrons get close to the current 75 limit. Especially if the

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group agrees on increasing the teacher limits. Bradley remembers from past discussions that libraries were seeing families come in using multiple cards to get past the limits. Kristin added that families use multiple cards because children enjoy using their own cards.

Ann asked if the limits could be explained again, what happens if a library changes their limits to differ from the standard. Amanda answered that the circulating rules apply, so the patron will check out with the transacting library's limits, not their home agency.

Some felt that the high limit for AV items was a concern and that they would have their own limits for media items. Videogames in particular were mentioned. Others said they would love patrons to check out 50 DVDs.

There was no consensus, so this issue will be brought back to the May meeting for a vote.

9. **Vote to accept updated Teacher Card procedure**

Shannon asked if teachers will need to get a new card or will just the lending change on the backend? Amanda said that if libraries wanted to, they could certainly give teachers a new card, but it would be the lending and flexibility that will change.

The new procedure passed by vote and will be updated and posted on the website for libraries to start using.

10. **Gather feedback about collection agency differences and limitations in CARL**

Molly sent out an email outlining the current limitations with CARL and using Unique Management Services (UMS). She also mentioned some solutions for those limitations and what the group thought about them.

CARL currently does not look at the assessed date for fines, meaning all fines no matter their assessed date are included when CARL determines whether an account qualifies for collections. We shouldn't be including fines older than March 2016, since the state statute for using a collection agency went into effect in February of 2016.

CARL is not looking to see if patrons have at least one item checked out before consideration for UMS. This may not be a major issue, but it is a change.

CARL is not taking into consideration open/closed days when determining when a patron account qualifies for UMS. Bills go out 28 consecutive days after the item due date. Then, the item status changes to LOST. From this date, the system then counts 45 consecutive days for UMS qualification. Making it a total of 73 days before an account with a LOST item is considered for UMS. Bradley added that the 45 days in Sierra was never a straight 45 days. The 45 days was designed to hit the sweet spots that UMS wanted us to aim for, which was 60 days.

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CARL does not allow patrons to be sent to collections manually. If a patron should have been sent and wasn't, staff need to contact OWLSnet, who will then contact TLC to have the patron sent. This is not a major issue or significant change in how we used to do this.

To address the older fines, we suggest that libraries using the collection agency waive all fines prior to April 2016 so that fines that were assessed before the law allowed libraries to use a collection agency are not included in collection agency reports. The decision to waive fines must be made at the local library board. If libraries are not comfortable with this, we need to push TLC to come up with a development solution.

To address the fact that CARL's UMS report does not consider closed days, we recommend changing the report settings so that items are eligible for collections 17 days after a bill is generated, which happens 28 days after the due date. An unreturned item will qualify to appear on the collection agency report 45 days after it is due.

Regarding waiving fines prior to 2016, Ellen asked if we are only talking about fines or bills too. Molly stated she is only talking about fines, because that is what seems to get patrons "stuck." Ellen added that if a patron has bills older than 2016, they could be sent to collections too? Molly said, yes, if their total bills are over $50.

Libraries will need to talk with their boards about waiving old fines, but the group seemed in agreement with waiving fines older than 2016 and changing the setting in CARL to 17 days. Molly will update the setting to 17 days, and she can help libraries use Report 3 – Problem Patron List to get an idea of the outstanding fines they have older than 2016. If there are concerns that come up later, please email Molly.

11. **Discuss changing the standard collection agency fee**

UMS recently sent an email to customers stating that the collection fee per patron account submitted was increasing to $10.95. They have since sent a correction, and the actual fee will be $9.85 starting May 1st. Molly asked if libraries were still comfortable with charging the $10 collection fee per patron account or if that should be raised.

Libraries agreed that fee will remain at $10.

12. **Discuss loan periods for language learning materials/DVDs**

A library asked to discuss longer loan periods for language learning DVDs. The standard DVD loan period may allow a patron to get the most out of the resource. Amanda asked if language learning materials should have longer loan periods than other DVDs?

There was much discussion over email about extending loan periods for language learning DVDs. Some thought all non-fiction DVDs could be extended to 28 days. Extending the loan period for TV series also came up. Some thought all DVDs should have a longer circulation period, but others were not ready to increase the loan periods

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on feature films, TV series, or video games. Some thought having different loan periods for DVDs would get confusing, especially if there was a short loan option for in-demand items and a regular long option for certain DVDs like learning materials or TV series, and shorter loan period for feature films and videogames and that it would be in the best interest of patrons to keep things as simple as possible.

On the backend, for this to work, OWLS would create a new media code and would change designated items to that new code with a longer loan period. Libraries could alter the loan periods on items at checkout, but we would want a standard loan rule for all libraries.

Some liked the idea of extending non-fiction DVDs to 28 days instead of trying to pick and choose which type of non-fiction DVDs to change. Renewing is not the best solution since items will not renew if they are in high demand. Overriding the due date at checkout is an option but will not always help or be an efficient solution.

TV series came up as a problem, because they are cataloged as one item and patrons have one week to watch multiple discs and they do not fall under the non-fiction DVD umbrella.

Aubrey asked if there could be an item type [media code] for courses that are DVD since non-fiction documentaries are different than courses. And Ellen added that non-fiction DVDs often involve learning something.

Rebecca asked if all video items could be changed to 28 days, with a short loan for things in high demand. Shauwn asked if there could be an "extended loan," opposite of "short loan" for items that need a longer loan period. A couple like the idea of the extended loan option. And others felt that a 2-week checkout would be a good middle ground. And those items with a hold line can use the one-week short loan checkout.

It was suggested that videogames should also have an extended loan period of 2 weeks. Then the idea of all media/AV materials should be a 2-week loan period with the option of the one-week short loan period for high demand titles.

A poll of libraries identified that we did not have consensus, so the proposal to have a 14-day standard loan period for media/AV materials and a 7-day short loan period for high demand media/AV materials will go to a vote at the May meeting.

13. **Can another library change a patron's Not Needed After Date on holds when an item's publishing date has been pushed back?**

   Acquisitions libraries have run into publishing dates getting pushed back. Sometimes patrons lose their holds because the new publishing date is after the hold's "not needed after" date. Is it alright for a library to change another library patron's not needed after day if it's because of a delayed publishing date?

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Ellen asked how this comes to the attention of libraries. Rebecca B. answered that she views her orders weekly and goes into CARL to view the holds. Ellen asked if acquisitions libraries are the only ones seeing this information. We do not have a report or alert for this. Ann stated that libraries can find the issue by reviewing records, but most acquisitions libraries are not doing what Rebecca is doing.

Majority of the group said, yes, libraries could change the not needed after date for their patrons when publishing dates have been pushed back.

Rebecca suggested changing the Not Needed After Date to 2 years instead of 1. Amanda asked the group if we should change it to 2, so that items don't fall off a patron's account without them knowing? The group agreed and Amanda will make those changes in CARL.

14. **Adjourn at 11:29am**

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