

## **OWLSnet Administrative Advisory Committee Meeting Online via GoToMeeting – November 17, 2023**

**Present:** Tasha Saecker, Owen Anderson, Appleton; Rachel Hitt, Black Creek; Jamie Hein, Clintonville; Rebecca Buchmann, Dominic Frandrup, Dawn Taylor, Shauwn Rosendale, Morgan Mann, Door County; Steph Weber, Florence; Ann Stearns, Fremont; Shannon Stoner, Gillett; Allie Krause, Hortonville; Robyn Grove, Iola; Ashley Thiem-Menning, Kaukauna; Carol Petrina, Kewaunee; Holly Selwitschka, Kimberly; Katie Essermann, Lakewood; April de la Ruelle, Lena; Michelle Best, Megan Kloeckner, Little Chute; Ellen Connor, Sue Vater Olsen, Manawa; Amy Commers, Marinette; Le Ann Hopp, Marion; Ann Hunt, New London; Holly Handt, Hannah Good Zima, Lori Baumgart, John Kronenburg, Tracy Vreeke, Maryssa Paulsen, NFLS; Amy Peterson, Oconto; Rachel Pascoe, Oconto Falls; Amanda Lee, Bradley Shipp, Molly Komp, Chad Glamann, Bryan Durkee, Debbie White, John Wisneski, OWLS; Meredith Miller, Scandinavia; Elizabeth Timmins, Seymour; Nancy Bell, Shawano; Michaela Woodward, Shiocton; Jill Trochta, Suring; Eric Bailey, Waupaca; Kelly Kneisler, Weyauwega

### **1. Call to Order and Introductions**

The meeting was called to order at 9:32 AM and Amanda went through roll call.

### **2. AAC Ground Rules & online meeting etiquette**

### **3. Minutes of the September 15, 2023, AAC meeting were approved.**

### **4. Announcements**

1. Bryan Durkee is the new Network Manager here at OWLS.
2. Megan Kloeckner is the new director at Little Chute. Welcome!
3. Damaged items should remain checked out to the patron and yellow slips used to note the damage. We are hearing reports of items being checked in and no damage being noted at all.
4. Please use rubber bands to keep multi-pack DVDs together in delivery tubs, especially when they all go together in an outer sleeve and the sleeve has the barcode on it. If they fall apart at WALTCO, they are usually never seen again.
5. Sue Abrahamson from Waupaca is retiring at the start of 2024. Patsy Servey is also stepping down.
6. Door County Reads will be early 2024. DCL won a humanities grant to support that. Congrats!
7. Appleton is moving to their second temporary location. They are closing as of next Wednesday, November 22<sup>nd</sup>. They plan to reopen January 8<sup>th</sup> at the old Restore on College Ave., just north of the current location.

### **5. Overview of Online Databases**

A document was shared that outlines the subscriptions that OWLS pays for.

- Ancestry usage has dropped significantly over the last year and cost-per-use is now about \$10. We will pay for Ancestry in 2024 but may recommend we drop it for 2025. Right now, we don't have details for usage by library, but Amanda will reach out to ProQuest and set up IP addresses for each library. This should give libraries some sense of whether it would be worth it to invest in it themselves if OWLSnet drops it. Ancestry is only accessible in the library itself.
- Tumblebooks usage remains good. It's a good resource and we don't know of another like it at this price range.
- Last year we participated in the state-wide WPLC magazine subscription and will continue to do so in 2024. OWLS and NFLS pay toward this subscription, so it is technically not an OWLSnet subscription.
- Content Café is used for cover images in Bibliocommons and NovelList Select for series and read-alikes.
- NovelList Plus is a database that has readers advisory tools. This resource is available to everyone with a library card.
- And of course, our discovery layer, BiblioCommons.

Some concern as to why Ancestry numbers dropped so drastically. We don't know specifically why but it could be a few factors: personal subscriptions, free access via a DNA test, lower PC usage overall at Appleton's temporary location, etc.

## **6. Review and Discuss OWLSnet Borrowers' Card Program Policy and Guidelines**

At the last meeting, we discussed the OWLSnet Borrowers' Card program policy and guidelines, and it was suggested it come back for more revision. A couple of people at the libraries gave suggestions on wording and we've come back with the document Amanda shared earlier this week. The group was okay with the revisions.

April asked about point #6 and if it meant staff should not be using the library address for those unhoused. Staff can use a Community Card if they would like to allow those patrons to check out limited items in order to limit loss, but they should not be using the library's address for regular patron cards. Community Cards are identified in the patron record by the Patron Card Type and indicates which library the card is from. Appleton uses a card that looks different than the usual InfoSoup blue cards. The idea of stickers for Community Cards came up. Some thought Community Cards should be a separate

policy. We ask everyone to think this over as to the main concerns had for issuing and using these cards and we will put it on the agenda for a future AAC meeting.

## **7. Blank and Unassigned Municipalities**

We ask libraries to assign a municipality to every patron record in CARL. We use this to figure out the nonresident circulation for the annual reports. We are still seeing blank and unassigned municipalities much more often than we'd like. We know this information is not always easy to find, but it's very important that it is there and accurate. For those not in a consolidated county, a municipality that is blank or unassigned is a potential reimbursement that a library is not going to get. Please make sure your staff are filling in this information when a patron registers and checking it when an address changes. If you have any questions on how to locate a municipality or would like training for your staff on this topic, please email Molly or OWLSnet Help. There is no way to run a canned report in CARL to get this data so OWLS needs to run it for libraries. Molly has sent lists out the past two years for libraries to clean up and will continue to do so as needed. Molly will investigate creating a future training webinar on this topic.

## **8. Online Registration Lifecycle**

There has been some confusion lately about online registrations, so we thought it would be helpful to put together a document that tells you everything there is to know about it and allow for questions.

- A patron can register for a temporary card on the InfoSoup website. It explicitly says on the webpage before the button to fill out the registration as well as in the confirmation email that the card is good for 30 days and they need to come to the library to finish the registration process.
- The card is good for 30 days and has a card type of Online Registration.
- No municipality or home agency is assigned, so patrons can access Libby/OverDrive, but not Hoopla (assuming a library is authenticating on Home Agency).
- CARL will flag potential duplicates based on first name, last name, and date of birth.
- Patrons are allowed to place 10 items on hold and check out 1 item.
- 30 days after the card expires, OWLSnet is deleting these accounts. Any holds or checkouts in OverDrive/Libby will be lost during this process.

If the patron updates their account before the 30-days, any holds will remain on their account. The confirmation email does not include information about losing digital holds if they don't complete the process. We have limited characters for the confirmation email, but we can try to add something there. If CARL thinks there is a duplicate, it won't stop the account from being made; however, it will mark the account as Soft Blocked and add a note indicating it could be a duplicate with the possible matching patron barcode. We can investigate making it a Hard Block instead of a Soft Block.

Some libraries are seeing this all the time. It creates multiple duplicates and staff spend a lot of time cleaning them up. Patrons will create an online card for access to Libby but will then continue to make cards as theirs expires or becomes blocked or just because they don't know they already have one. Patrons can also add their online barcode to the app and use this at self-checks. Staff had no idea that the patron was in the library and checking out. We'll ask if OCLC can stop the use of card numbers starting with '873' being added to the app.

The group seemed split on whether to completely remove the option of online registration or not. Sentiment shows that if we remove the online option, then we are moving backwards in a technological world. We can work on adding more language to the form but we already know patrons are not reading what is already there. Taking away holds for the online cards came up but that was dismissed. OWLS will see what options there are available and bring this to a future AAC meeting.

#### **9. Home Agency vs Preferred Branch in CARL**

Home Agency and Preferred Branch are both fields in the patron record in CARL. Home Agency is one of the user-defined fields. It indicates where a patron is registered, is subject to the OWLSnet Patron Home Agency Policy, it's used for reporting purposes (and determining a library's patrons) and is used to authenticate library-specific services like Hoopla. The library controls this field, which is why we recommend authenticating on Home Agency.

Preferred Branch is something patrons can change to reflect their preferred pickup location in InfoSoup. This does not need to match Home Agency, but we prefer that it does.

Amanda will share the document via Updates and will post it to the website.

Patrons have signed up at one library just to max out the Hoopla holds and then moved on to the next library to max out Hoopla holds again. We can't stop this but please be aware if you are a Hoopla library and are getting requests to change home agencies. There was some side conversation about Hoopla and cutting the service due to their pricing model. Hoopla libraries mentioned getting together to discuss Hoopla and options. If you are interested, please reach out to a Hoopla library.

#### **10. Vote on ILS Exploration**

Our contract with TLC is coming up for renewal at the end of 2024. The question up for a vote today is whether we should explore our ILS options now or wait a few more years to see how CARL development progresses.

In 2019, OWLSnet members voted to migrate from Sierra to CARL with BiblioCommons as the discovery layer. Migration to CARL occurred in 2020, and we went live in August 2020. Due to the pandemic, we were unable to conduct in-person training as we'd initially planned. We were also unable to implement CARL and BiblioCommons at the same time. We have conducted satisfaction surveys over the past two years and results

indicate that satisfaction has improved but is still not where we would like it to be. There are some major pain points with confusion and frustration around two different platforms that do different tasks, not being intuitive, and development is slower than promised cited most often in the survey.

Amy asked if there would still be an offline circ option if we were just web-based and lost internet. There would still be the client offline circ function if internet was down. Almost every ILS vendor is working on a web version of their client. We don't know of any customer fully using a web-version, and we won't know for certain until we start researching.

There was frustration with how TLC mislead us in their current development, and we should be looking at timeframes. There was agreement that if we're to sign another 5-year contract, we need to know more details if our developmental needs will be met.

Some staff weren't here for the migration and didn't know how to answer the satisfaction survey. Staff agreed that they didn't answer that things have improved since migration because the product has gotten better, but rather, they became more familiar with the ILS.

Staff appreciated that they can mostly run their own reports. Training for CARL is difficult since staff need to jump between two platforms and to demonstrate many workarounds to get something to work as expected. Staff are finding that they must scan materials more than once to guarantee it was checked in. Relying on two products is not practical and neither one is a great option as a stand-alone. Most vendors already have two products or are working on a web-based version. Most likely than not, we would have two products with any vendor we go with.

Vendors are moving toward the cloud-based because it is easier to push out updates. OWLSnet specifically uses a VPN because of how the network is set up. The cloud-based platforms theoretically don't need to use a VPN to access it.

Keep in mind, some of the reasons we migrated to begin with: the cost of Sierra was getting expensive and we wanted additional services that had a cost we couldn't afford while on Sierra.

The vote did not pass; Waupaca abstained. We will reach out to the libraries that weren't present to get their thoughts. We haven't seen a vote this close in OWLSnet but it is consistent with the survey results.

## **11. Adjourn 11:14AM**