

## **Patron Services Committee Meeting Minutes**

**June 18, 2024, 1 p.m. CT/2 p.m. ET  
Online Meeting**

### Voting Members Present:

- Debbie Barr, Lebanon Public Library
- Kathy Bowen, Thorntown Public Library
- Vickie Fleischauer, South Whitley Community Public Library
- Emily Matthys Bennett, Oxford Public Library
- Jess McAlister, Jefferson County Public Library
- Misty Morse, Clinton Public Library
- Robert Neuenschwander, Warren Public Library
- Katie Noonan, Vernon Township Public Library
- Nick Philip, Plainfield-Guilford Twp PUblic Library
- Kim Riley, Sheridan Public Library

### Non-voting Members Present:

- Courtney Brown, Indiana State Library
- Britta Dorsey, Indiana State Library

### Guests Present:

- Lynette Barnett, Kendallville Public Library
- Inge Kokidko, Porter County Public Library

- I. Call Meeting to Order - Meeting called to order at 2:00PM (ET) by Nick Philip, Chair
- II. Approval of Agenda - Motioned: Emily Matthys Bennett, Seconded: Jess McAlister, Motion passed.
- III. Approval of the Minutes from February 20, 2024 - Motioned: Vickie Fleischauer, Seconded: Emily Matthys Bennett, Motion passed.
- IV. Approval of the Minutes from April 16, 2024 - Motioned: Jess McAlister, Seconded: Misty Morse, Motion passed.
- V. Indiana State Library Report
  - A. New Director - Courtney Brown introduced herself.
  - B. Update to 3.13 - The current plan is to update the weekend before Thanksgiving, (11/23-11/24). Britta shared there will be many accessibility updates. The Reports module and the Enhanced Marc Editor module will be updated.
  - C. Regional User Group Meetings
    1. Parke County - 9/17/24
    2. Jackson County - 9/20/24
    3. Pike County - 9/24/24
    4. Morrison Reeves - 9/26/24

5. Danville - TBD
6. Noble County - TBD
7. Porter County - TBD

This is not a conference year thus the reason for Regional User Group Meetings. The meetings are usually held from 10am-Noon with the option to go to lunch with the group. Information will be shared and there will be time for discussion. Courtney will reach out to everyone who is registered to see if there are any topics they want to discuss.

D. Text message notifications - We were having an issue, primarily with Verizon, where they were throttling our text message notifications. They first throttled us at 800, then it was 400. We send thousands of those messages per day. We signed a contract with Unique Library for their MessageBee product for text messages. It began yesterday, June 17, in the middle of the day. Everything seems to be running great so we can let patrons know the issue has been resolved.

E. Member recruitment and onboarding

1. Morrisson Reeves Library had a successful go-live on April 30. They had a newspaper index that Jeremy created a database for those to load to. Britta and the staff at Morrisson Reeves worked very hard to get everything uploaded.
2. Jasonville PL is currently re-barcoding their entire collection. They are awaiting more supplies to continue.
3. Owensville PL - go live date is set for August 27.
4. Edinburgh PL - Courtney and Britta met with staff at Edinburgh PL and they are very interested in joining Evergreen, but there is no official decision to date. They are the last library using the AVC ILS and need to make a change. If they make the decision to migrate to Evergreen their collection will need to be cataloged into the Evergreen catalog which will require some cataloging parties.

VI. Training Report - Britta shared information on her live trainings since May 2. These include 3 for "Aspen from the Patron's Perspective"; "Local Administration" trainings (5/16 and upcoming 6/27); "MARC From Scratch: CD Music"; "Using the Simple Reporter"; "Billing in Evergreen" scheduled for 7/9.

All Google Drive documentation, except for Acquisitions, has been updated to 3.11 and will now need to be updated to 3.13 - [https://evergreenindiana.org/?post\\_type=docs](https://evergreenindiana.org/?post_type=docs). She asked the committee to take a look and let her know if she needs to fix or add anything.

She has been working on a Permissions Project and has been updating permission lists for library staff working profile groups. This is to note the difference between Circ1 and Circ2, which is primarily override permissions. This is helping her to determine what she needs to change for Circulation themed webinars to help libraries decide which profile type is best for their library staff.

VII. Unfinished Business

1. Circulation Procedure Guide - Exceptions to allow for duplicate accounts  
[https://docs.google.com/document/d/1HGpFPwqNDQqEQOp0v3e\\_C5\\_E1PypuoWXS-4Znli2-uc/edit?usp=sharing](https://docs.google.com/document/d/1HGpFPwqNDQqEQOp0v3e_C5_E1PypuoWXS-4Znli2-uc/edit?usp=sharing)

Britta reminded the committee to look at "Exceptions to allow for duplicate accounts" in the Circulation Procedure Guide to determine changes to the language for the Adult Clean Slate

procedure to give member libraries the ability to create a duplicate patron account when the patron is moving to a new Evergreen library (adult account) with fines accrued before their 18th birthday (juvenile account) at a previous Evergreen library. The section on communication between libraries is what the committee needs to determine. Some members had not received the documentation so Britta will send it out separately so everyone can review. This will be added to the August meeting agenda.

#### VIII. New Business

##### A. Committee elections

Courtney welcomed the new members to the committee:

Class B - Debbie Barr, Lebanon PL; Nick Philip, Plainfield Guilford Township PL

Class C - Robert Neuenschwander, Warren PL; Kathy Bowen, Thorntown PL

At-Large - Kim Riley, Sheridan PL; Emily Matthys Bennett, Oxford PL

Fill-in Class A/At-Large seat, expiring 2025 -Vickie Fleischauer, South Whitley Community PL

Fill-in Class C seat, expiring 2025 - Misty Morse, Clinton PL

Nick asked for nominations for Secretary, Chair-Elect, and Chair.

Suggested slate - Secretary - Kathy Bowen  
Chair Elect - Emily Matthys Bennett  
Chair - Jess McAlister

Motion to approve: Misty Morse, 2nd Debbie Barr. Motion passed.

B. Circulation Procedures Guide (updates) - Britta explained we need to go through the Circulation Procedures Guide to make sure it matches the updated Circulation Policy. The first section she shared was Proper Identification: Establishing Identity and Residency. Suggestions were made to mirror the language in the Policy which says choices for identification are recommended but ultimately up to each member library. It was recommended to keep the bulleted list in place. It was decided to re-visit in August so committee members will have time to go over it.

C. Request for circulation modifier with 1 item limit - specifically hotspots.

After discussion it was decided to go with two new modifiers - "High-Demand" and "High-Demand Limited" (for 18+). Neither would have a grace day or renewals. Fine levels and circulation durations will be the same as "Equipment Restricted" and "Equipment Limited". They are holdable and not transitable. Motion to approve: Emily Matthys Bennett; 2nd - Jess McAlister. Motion passed.

D. Aspen Settings

Courtney noted there are some options available in Aspen that we do not have turned on. After discussion the committee agreed "digital barcodes" and "patron ability to change their username" should be turned on. Motion to approve: Jess McAlister; 2nd - Kim Riley. Motion passed.

Hoopla - there is the ability to hide Hoopla offerings if the item is available elsewhere (like Libby). The point was made that some items have extremely long wait periods but it was pointed out that the Hoopla offering would only be hidden if the Libby offering was immediately available. Britta agreed to test the Hoopla issue. We will revisit during the August meeting.

- E. Discussion: more neutral patron types - Inge Kokidko spoke about how the patron user types and their descriptions create some staff confusion. She shared that before becoming an Evergreen library they issued local access cards to unsponsored students. The "Student" and "Junior" profiles offer what they need but she would like to see higher than 3 allowed checkouts. After much discussion it was decided to table the discussion until the August meeting after members could research regarding how other libraries use these types. Britta mentioned that any suggestion regarding this issue would need to go to the Executive Committee.
- F. Discussion: minor sponsor requirements
- G. Discussion: patron privacy

Inge shared that the Circulation Policy reads that only residents can sponsor minors. Is that the intent? Example: child is resident but parent is not. Confidentiality Policy - patron access is only available to cardholder. If parent is not the sponsor they have no access to the child's account. Maybe add legal guardian? Could we share item type and cost if a non-sponsoring parent calls the library to ask about lost items? Who can be a sponsor? Who has actual access to child's patron records? What types of information can be released over the phone? After discussion, it was agreed to table items F. & G. to August meeting

- H. Discussion: non-resident fees - the question was asked if it is right to direct patrons to libraries that have lower non-resident fees - Yes, it is a common practice.
- I. PLAC rules and Evergreen Libraries - patrons can purchase multiple PLAC cards even though they will have multiple Evergreen accounts. Suggestion is to annotate the account when created so other libraries will know what is going on. Nick suggested adding language to the Duplicate Patron Records section - "Libraries are strongly encouraged to annotate in this case." Motion to approve: Misty Morse, 2nd: Emily Matthys Bennett. Motion passed.

IX. Public Comments - None

X. Announcements

Next meeting: August 20, 2024 via Zoom, 1 p.m. CT/2 p.m. ET

XI. Adjournment - 3:47 ET/2:47 CT

Motioned: Emily Matthys Bennett, 2nd: Kim Riley. Motion passed.