

**OWLSnet  
Administrative Advisory Committee Meeting  
Outagamie Waupaca Library System  
November 15, 2019**

Present: Cathy Kolbeck, Algoma; Colleen Rortvedt, Tasha Saecker, Beth Carpenter, Owen Anderson (online), Anne Paterson (online), APL; Eva Kozerski, Black Creek; Jamie Hein, Clintonville; Tina Kakuske (online), Rebecca Buchmann (online), Dawn Taylor (online), Door County; Steph Weber, Florence; Natalie Snyder (online), Fremont; Kay Rankel, Gillett; Allie Krause, Hortonville; Robyn Grove (online), Iola; Ashley Thiem-Menning, Kaukauna; Carol Petrina, Kewaunee; Steve Thiry, Kimberly-Little Chute; Amy Peterson, Lena; Ellen Connor, Manawa; Jennifer Thiele, Joanne Finnell, Marinette County; Le Ann Hopp, Marion; Ann Hunt, New London; Tracy Vreeke, John Kronenburg, Lori Baumgart (online), NFLS; Kristin Laufenberg, Oconto; Joan Denis, Oconto Falls; Kymberley Pelky (online), Wanda Boivin (online), Oneida; Dave Bacon, Evan Bend, Amanda Lee, Bradley Shipp, Liz Kauth, Debbie White, John Wisneski, OWLS; Sue Vater Olsen (online), Scandinavia; Elizabeth Timmins, Seymour; Kristie Hauer, Shawano County; Shay Foxenberg, Shiocton; Jill Trochta (online), Suring; Peg Burington, Waupaca; Kelly Kneisler (online), Weyauwega.

**1. Call to Order and Introductions**

The meeting was called to order at 9:30am and introductions were made.

**2. Minutes of the September 20, 2019 Meeting**

The minutes of the September 20<sup>th</sup> meeting were approved after Amanda added Shay's name to the list of attendees.

**3. AAC Ground Rules**

The AAC ground rules were reviewed.

**4. Announcements**

- a. Molly is out now until January. Please send requests to OWLSnet Help. Please have patience with all OWLS staff while Molly is out, as a lot of us are covering her tasks.

**5. Staff Report**

- a. Amanda reminded everyone that payments for lost and billed items should be sent through mail, not delivery.
- b. Magazines that go into transit should be put in an envelope. Please don't be afraid to contact a library who forgot to do these steps—it could be a new person or they just forgot because it's not something they deal with often.

## **6. WPLC Roundtable Update**

**Details Presented:** Evan, Tracy, Tina and Jamie attended the recent WPLC Roundtable. The goal was to come up with a more unified vision of the online collection. The attendees worked on clarifying the goals for supporting and funding the digital collection. The main topic of conversation was Macmillan's policy to place an 8-week embargo on new eBooks. Currently WPLC is recommending that no one purchases any new Macmillan eBook titles until WPLC can come up with an official policy. There was a lengthy discussion about possibly boycotting Macmillan because of their embargo. WPLC is reaching out to other large OverDrive customers with hope of establishing a unified approach for working with publishers who restrict Library access to eBooks. There was strong support for raising the buying pool. Most agreed that the proper way to increase spending is through the Advantage accounts. Tracy said that she thought the day was productive and that a lot of strategic planning was accomplished. Tracy added that Wisconsin is a big player in this field, so we have some responsibility to ask for what we want.

## **7. InfoSoup bookmarks**

Evan distributed examples of the new bookmarks that Chad designed. The next step is to get printing costs. Please share your feedback about the bookmarks with Evan and Chad. Based on comments provided, we will enlarge the list of libraries on the backside, for readability. We hope to have bookmarks available in the next 3 –6 weeks depending on printing options.

## **8. Email Security**

**Details Presented:** Due to recent unauthorized access to some of our Office 365 accounts, OWLS staff have started to use two-factor authentication for password security. OWLS is considering recommending that all libraries use two-factor authentication and looking into other security measures we might be able to implement. OWLS highly recommends the use of a password manager as one of the best security measures you can take. By the next AAC meeting, we hope to have a more set security plan for email best practices. On the OWLSnet home page, under Office 365, and Email Security, there are links for best practices. Evan asked if the libraries would like training on using a password manager, to which there was interest. It's a matter of when something is going to happen, not if it will happen so we want to make sure that we are taking safety precautions. The agency account has patron information, so that could lead to a breach of privacy and bad publicity. Bradley added that all libraries have staff turnover, and suggested training on being skeptical about attachments and links in emails. Wisconsin has had one local government that has been hit by a virus, and the more that we can be aware the less likely that we will be vulnerable to some sort of attack. Bradley said that if a suspicious email looks like it came from inside OWLSnet to let OWLS know. The more it looks like an OWLSnet email, the more concerned we will be. Eva added that she took a webinar

recently, and we should probably be notifying patrons about good practices with email links and attachments as well. Bradley suggested naming PDFs clearly so it is obvious what the attachment is and that it's safe to open. Lori (NFLS) commented online that Waltco does not use good descriptions for their attachments. Evan added that he tries to add a few extra comments in his emails so that it's clear that a human is sending the email. Evan thanked everyone for the great questions and comments.

**Questions:** Peg (WAU) asked if we do see something, what is the procedure if it does happen? Evan said to contact OWLSnet for help. He can see if scam emails have gone to one person or to everyone. Evan asked if the libraries would prefer to be notified every time it happens? The consensus was to try notifying all libraries about all scams for a while. Kelly (WEY) commented online that it's a good idea for us to be more vigilant if the emails are sent out every time there is a problem. John (Nicolet) noted that people look at bad emails first before they would look at an email warning from OWLS, so would email warnings really work?

**Action Items:** OWLS will try to put together a packet for the libraries to share with staff and patrons.

## **9. Advocating for more reliable Badgernet service**

**Details Presented:** Bradley recognized that we've had a lot of data interruptions this year and several data outages. Two libraries have experienced 6 disruptions and the outages ranged from 3 hours to 247 hours long. Next week, the OWLS Board will approve a letter to send to Matt, our contact at TEACH, so he can forward it up the line.

Another option would be to write to our legislators about Badgernet problems. Creating redundancy in the network will be expensive, so legislators need to know our needs. Bradley suggests that individual libraries send letters to have more voices complaining. The network is not robust enough to meet our needs and survive construction season. We would like to lobby that Badgernet put more money towards coverage and redundancy.

At the system directors meeting Bradley attended, it was noted there is quite a bit of federal money to expand broadband in rural areas. Libraries and municipalities need to know how to apply for this funding.

Tracy said she will ask the NFLS board to send a letter.

Joanne told the group she has a friend who works for Centurytel who once said if we are in an emergency from storms, contractors do not have to contact Diggers Hotline, so more cuts are likely. Nearly all our outages have been due to fiber cuts.

Joan has a patron who constantly complains about internet outages, which is impacting her library's computer use. She encourages libraries to send letters because disruptions impact the public's faith in the services.

Let Bradley know if you would like a copy of the letter and she will send it to you. TEACH specifically wants complaints in writing.

## **10. ILS Platform Selection Committee Recommendation for ILS Platform**

**Details Presented:** Amanda sent out a document outlining the ILS Platform Selection Committee's recommendation that we adopt TLC's CARL X as our new ILS. A lot of people on the committee went into the CARL X demo thinking that our decision had been made, but 20 minutes into the demo they realized that CARL was a serious contender. The committee feels confident about this decision, and the results in the evaluation matrix show why.

As far as costs go, Sierra's price was not competitive, which included hosted servers and additional functionality. Symphony and CARL X could provide almost everything we asked for at a lower cost. The committee decided that they did not think a separate app was necessary if the mobile site did what an app would do.

If we stayed with Sierra without the added functionality, we would need to buy more servers and prices would continue to increase. Steve noted that CARL X is so much further along than Sierra. Amanda asked current users of CARL if they have issues losing printing settings, they said not while using the client. Beth said CARL X felt like it functioned how we would want it to work for our staff and wondered why haven't we seen this before? CARL is privately owned, so they are selective about how many libraries they bring on each year. CARL allows 3 requests a year from each customer to improve software, and they build their roadmap based on those requests.

Amanda talked to two libraries on CARL who enjoy being an active partner in updating the software. CARL has 15 customers, but those 15 customers account for over 85 million circulations.

Peg had previously talked to Amanda about adding a "preferred pronouns" field in the patron record in Sierra. CARL allows for more user-defined fields, so we could create a field in the patron record for preferred pronouns. It's important that we provide that so that our staff can get it right.

Tracy thought CARL was impressive, which is likely because CARL hires librarians. You could tell that people designing the software had worked in public libraries.

Bradley mentioned OWLS has fewer staff than it did, and by moving to hosted servers that will free up staff time and money. Sierra would charge an additional \$40,000 annually for this. CARL will rebuild our reports for us during the migration. Most of our reports were built by Gerri to manipulate raw data from Sierra, and they require a lot of staff intervention. She anticipates some staff time being freed up. Libraries will also be able to run many reports they frequently ask for themselves.

Amanda also noted that CARL works with all SIP2 providers, and unlimited SIP2 licenses were included in the quote.

CARL will work with all 3<sup>rd</sup> party discovery layers. Opportunities to collaborate with other systems, libraries, or schools are still available to us because CARL allows us to input/export data. We feel confident that we can collaborate with any other organizations even if we are not on the same platform.

**Questions:** Amy asked if the patron's online account features a library card barcode on their phone, would libraries need different scanners to read barcodes on the phone?

It depends when you bought the scanner. Many will read phone screens, but some older ones will not.

Does this change how patrons see Infosoup? Yes, InfoSoup will look different.

Will Millennium self-checks still work? They will have an alternative to the Millennium self-checks that we included in the price quotes.

Peg asked if there were any examples of the ILS they could see. The demo was not recorded so there are no examples for AAC to look at. Amanda then asked the people who were at the demo what their impressions were. Beth was impressed with offline circ. If the ILS can't find the network, it will send a pop-up window asking if you'd like to use offline circ. One would just click "yes", and the system will populate things like location, date, time—things we currently have to manually enter. The only thing it won't be able to do is determine loan periods, so you'd have to enter "7" in the days box for DVDs or "28" for books. When the ILS finds a network connection it will send another pop-up saying it's now connected, would you like to process offline circ. You'd then click "yes" again, and it takes care of it—no more calling OWLS to process offline circ!

It was also noted that CARL can email receipts to patrons.

Natalie asked about a timeline for transition. Amanda said 6 months will be required for migration. CARL will work with us closely, including weekly calls. They will also rewrite all of our reports for us. They have done Sierra migrations before, so we're confident they can get us

migrated in that timeframe. Bradley pointed out we don't have a date at this time. Our end date with Sierra is August 31, 2020, which means we will likely have a go-live date during summer.

Joan asked if reading history will transfer over. Amanda didn't know so she will ask.

**VOTE:** Ann Hunt made the motion AAC accept the ILS recommendation and Steve seconded the motion. AAC voted and the ILS recommendation was accepted. OWLSnet will move to TLC's CARL X platform in 2020.

Amanda thanked the committee for all their hard work and thanked the directors for allowing staff time away from their libraries to participate in this project. OWLSnet looks forward to creating something amazing with and for libraries, patrons, and communities in Northeast Wisconsin.

#### **Action Items:**

Amanda will follow up on the reading history question.

#### **11. ILS Platform Selection Committee Recommendation for BiblioCommons:**

##### **Details Presented:**

Discovery layers were not initially within the scope of ILS committee, but an opportunity came along to consider BiblioCommons. The committee recommends BiblioCommons be implemented at the same time as CARL X.

It is an investment, but the committee believes it is worth it. Evan explained some of the features that led to this conclusion:

- The search algorithm brings the user what they are expecting to find right away and is the most sophisticated and accurate in the market. Misspellings even bring back what one is most likely looking for.
- The design was the most finished of all discovery layers.
- Libraries using BiblioCommons are known as movers and shakers in the field and include Columbus Metropolitan Library, Hennepin County Library, Chicago Public Library, and Seattle Public Library.
- Library staff can easily build and share lists on websites, social media, or within the OPAC.
- Results are returned in a FRBRized display, so you can see the different versions of a work in one place. CARL might have something like this soon as well (it's in Beta testing).

- A “While You Wait” feature suggests similar, available items patrons can check out while they wait for their hold to be fulfilled.

Recommendations are an add-on in BiblioCommons, as is cover art. OWLSnet currently uses Bookletters for cover art, which we will need to replace even if we use CARL’s OPAC. The costs for enhanced content we might add to BiblioCommons vary a lot and making those selections will be quite complicated.

Overdrive works the same in BiblioCommons as it does in Encore in that a patron can check out an item directly from the OPAC. Hoopla and RBDigital would still require going to a different site.

Kelly thought BiblioCommons seemed more patron friendly than staff friendly, but it does look very nice.

Peg asked how much more are we talking as compared to how much we pay right now. Evan went over the cost options.

Tracy thought BiblioCommons was an excellent product and that we would have a forward-focused product for our system if we went with it.

#### **Questions:**

Bradley asked AAC how important is it to control fees? Is this how we want to spend this money? Peg said we need to spend money on how the public uses us and sees us. Sue thought BiblioCommons was great, but another OWLS staff member and more digital content would be great as well. Kelly thought the patron experience needs to be a priority. Ashley pointed out that circulation numbers are down, and BiblioCommons might help increase circs. Bradley noted that both CARL and BiblioCommons representatives have claimed both products help with increasing circ.

#### **Decisions:**

Ann made a motion to accept the ILS Committee's recommendation to adopt BiblioCommons. Steph seconded the motion. The motion carried; Suring abstained.

BiblioCommons will be implemented with CARL. Bradley thanked AAC for their involvement, engagement and interest in the process. Here we go 2020!

#### **Subscription Services Renewal Decisions**

**Details Presented:** Evan started this discussion by going over usage for audiobooks, magazines, and Tumblebooks. He recommends we continue offering these services as well as Bookletters for the next year.

Language programs have always been challenging to offer. Last year we tried Transparent Languages. Data indicates that patrons seemed to give it a try once, and then decided not to use it again. Many people seem to be learning languages via free, online resources. Evan pointed out that this is our 3<sup>rd</sup> attempt with languages and all have failed to generate interest. Kelly thought it was hard to compete with free. Bradley noted that maybe we can't compete in the online sphere for languages, but in-person programming is very successful if a library can offer those opportunities with their communities.

Evan then moved on to genealogy resources. Last year OWLSnet dropped Ancestry to move to My Heritage, which allowed for use outside the library. Joanne relayed that their adult reference librarian said My Heritage is cumbersome and does not provide a lot of information for patrons. She would prefer getting Ancestry back. The cost for Ancestry would be about \$18,000. APL and Door County currently have Ancestry subscriptions because they have the user base. Bradley noted that access outside the library did not increase usage. What's the best use of our dollars? Steve was comfortable referring patrons to a library with dedicated reference staff for ancestry work, because it's such a specialized area. Kelly pointed out that libraries may not be the place that patrons go for ancestry work. Evan agreed that there is so much advertising for Ancestry services out there that patrons may be getting their own subscriptions.

Steve proposed that we do not provide system wide database for genealogical research. Joan agreed. Bradley checked for consensus and found there was not consensus for doing away with both genealogy databases. Ashley suggested we switch to Ancestry. Her patrons want Ancestry. Sue was in favor of not providing a genealogy database. Steve noticed that several people want to have Ancestry, while others don't care. If a dozen people want it, they should provide it for their own libraries. Bradley proposed that we switch to Ancestry and put the additional \$5,000 we'd save toward Overdrive. Ann seconded the motion to switch to Ancestry and put money extra money towards Overdrive.

**Questions:** Eva asked what other systems in the state do for genealogy? If we had a robust set of links, would it accomplish what a database would do? Evan said most genealogy resources are provided at a library level, not a system level.

Peg asked the smaller libraries, if one of the larger libraries in your region had Ancestry, would your patrons travel to use it? Joanne pointed out it's a long drive in Marinette County. Sue



thinks her patrons would travel. Ashley said the majority of people who use Ancestry are elderly, so they would not be interested in driving to a different library to do their research.

Sue asked about mixed level of funding, part system, part library. Bradley pointed out that if it's less expensive for the system to buy the service than the individual libraries then we should go that route.

**Decisions:** Cancel My Heritage, implement Ancestry at the system level, put \$5000 toward OverDrive. The proposal passed by consensus with the understanding we will revisit this next year.

## **12. Phenol-free Receipt Printer Paper**

**Details Presented:** A case of 50 rolls of phenol-free receipt paper would increase to \$61 per case, an increase of \$7. Elizabeth said for no cancer, a \$7 increase is ok.

**Action Items:** OWLS will notify the supplier that we will be ordering phenol-free paper and start sending that out to libraries after the BPA-free paper runs out.

**Decisions:** AAC agreed by consensus to switch to phenol-free paper.