

**OWLSnet
Administrative Advisory Committee Meeting
Outagamie Waupaca Library System
January 16, 2009**

Present: Rita Schiesser, Algoma; Kathy Beck, Terry Dawson, Kris Kipping, Brian Kopetsky, Vicki Lenz, Michael Nitz, Karen Probst, Colleen Rortvedt, Katie Scullion, Appleton; Rebecca Buchmann, Black Creek; Kathy Mitchell, Clintonville; Susan O'Leary Frick, Fremont; Kay Rankel, Gillett; Carolyn Habeck, Hortonville; Robyn Grove, Iola, Maggie Waggoner, Kaukauna; Kathy Decker, Susan Grosshuesch, Kewaunee; Barbara Wentzel, Kimberly/Little Chute; Pam Ellingson, Lakewood; Ellen Connor, Manawa; Trinitie Wilke, Marion; Sandra Hipke, Jennifer Thiele, Marinette; Ann Hunt, New London; Cherie Bartha, Joan Denis, Oconto Falls; Beth Carpenter, Patty Hankey, Laura Jandacek, Rick Krumwiede, Gerri Moeller, Anne Paterson, OWLS; Sue Vater Olsen, Scandinavia; Elizabeth Timmons, Seymour; Sharrie Schweitzer, Kristie Wilson, Shawano; Becky Rickel, Shiocton; Becca Berger, Joe Clabots, Linda Streyle, Sturgeon Bay; Karen Kortbein, Wausaukee, Peg Burington, Ruth Hoppe, Waupaca; Kristi Pennebecker, Weyauwega

1. Call to order

The meeting came to order at 9:30am at the Appleton Public Library. Terry Dawson welcomed the group to the library. All attendees introduced themselves.

2. Minutes of the November 14, 2008

The minutes of the meeting were accepted as distributed.

3. AAC ground rules

Rick reminded everyone that with such a large group it can be difficult to hear and follow the discussion. He asked everyone to help the meeting function more effectively by remembering the AAC ground rules:

- Only one person speaks at a time
- Please wait until you are recognized to speak
- If you've spoken to the issue already, please let others speak

4. Announcements

- Colleen Rortvedt is the new assistant director at the Appleton Public Library. Congratulations, Colleen!
- Barbara Wentzel from Kimberly/Little Chute will be retiring in early summer this year.
- Joe Clabots from Door County libraries will be retiring in February. This is his last AAC meeting. Congratulations, Joe.
- Stephenson Public Library, Marinette was mentioned in an issue of Library Journal 12/15/08 for its architectural design. Congratulations!

5. Information from OWLS and OWLSnet staff

- Brown County Update
The Brown County Library Board has agreed to pursue membership in OWLSnet. The library board is enthusiastic about membership, but it's likely that county officials would also have to approve. The OWLS library board is willing to accept Brown County Library as an OWLSnet member as long as policy, procedure, cost and resource sharing issues can be resolved.

- The [Brown County Membership Proposal](#) and [2008 OWLSnet Partnership Report](#) have been posted on the OWLSnet website.
- Committee and user group updates
 - Patron Registration Committee

The Patron Registration Procedure document is completed. Gerri will post a link to the document and is asking the libraries to review the document and post comments. The document will be submitted to AAC for final approval in the near future.
 - Tech Talks/Circ Works

OWLS will host a trial Tech Talks/Circ Works meeting, “20 Things All Circ Desk staff should know”, using Go to Webinar software. A doodle poll will be sent out to find the best time to hold this 1 hour meeting. A microphone or headset will be needed to audibly communicate during the meeting. Beth has posted a headset recommendation on [Network News 1/19/09](#).
- Circulation update
 - The implementation of the transit slips is completed. All libraries finished updating their computers well before the deadline. The implementation didn’t go as smoothly as we planned because there were a number of technical issues with the printer drivers and the different models of receipt printer.
 - The newest receipt printer - model TM-T88IV is significantly faster than all of the older models. Also, we’ve learned that only the models T88IV and T88III work with Vista (or are likely to work with the next Windows operating system). Therefore, OWLS strongly recommends that libraries replace older receipt printers in 2009/2010. The cost for the latest model is approximately \$325.
 - Libraries agreed to continue using the yellow problem slips on problem items and the new white transit slips on items in transit to South Central Library System or when there is catastrophic failure of a receipt printer. The entire name of the library should be written on the white slips.
 - Gerri will attempt to move the print higher up on the transit slip to prevent the slips from curling over. The group also decided to remove the “To” before the library destination on the transit slips. Many find it to be a distraction when sorting.
 - The group discussed the document [Transit Slips Decisions - Take Two](#), and decided to implement the following procedures and revisit them at the March AAC meeting.
 1. We are not going to implement automatic transit slip printing. While this would be helpful for many libraries, county libraries often send complete tubs of new items to their branches, and this would be a waste of time and paper for them. The libraries felt that hitting the space bar was a small price to pay to allow for more flexibility for some libraries.
 2. We will require all items in transit to have their own transit slip.
 3. Items can be bundled together under the following circumstances:
 - Each item must have its own transit slip
 - Items to be bundled must be the same size and type
 - Bundles must be no more than three inches high
 - Holds must be bundled separately from returns
 4. Transit slips should be inserted up to the dotted line for books, DVDs and CDs. Rubberbands should be used to hold the items together when necessary. Slips should not be placed inside the plastic DVD or CD cover.

5. Magazines should be routed in routing envelopes. Slips are not necessary for magazines – instead the routing envelope should be filled out. Please make sure that previous entries on the envelope are crossed out. (Note: another option is to tape the transit slip to the routing envelope using removable tape.)
 6. In order to keep the transit slips face up in the bins, the slips should be placed in the item so they are legible from the front of the item.
- The group discussed damaged items and Waltco's responsibility in reimbursement of items damaged in transit. There are a few instances where Waltco has paid for damaged items. However, there are no guidelines currently in place and reimbursement of damaged items is done on a case-by-case basis. OWLS and NFLS will work together on creating guidelines for these instances.
 - Bradd Hintz, OWLS very own graphic artist, has completed the first draft of the online registration form. It will be presented to the Patron Registration Committee next week for review.
- InfoSoup Development Update.
 - The Syndetics contract (for cover art and additional content) is expiring soon. Evan demonstrated the updated Syndetics product in the staging server, and encouraged staff to take a look. The updated Syndetics product is an improvement, but doesn't have everything we're looking for. It now features a link to content information from the cover art images and offers an all music guide for additional music information. Baker and Taylor have a similar product but there appears to be no difference in quality from what Syndetics has. Bookletters may have a product in the near future that offers a nicer display and costs less however it may not be available before our contract with Syndetics expires. The group agreed they feel confident with Evan's recommendations and do not need to evaluate every product but would like to be kept informed.
 - Beth has posted a survey about the usefulness of screencasts, podcasts, etc for patrons on InfoSoup. The results will be shared on the InfoSoup Development blog after the survey ends.
 - A [Job & Career Resources page](#) has been added to the InfoSoup Research Tools Page.
 - Beth demonstrated how to save a record in "My Lists" when searching in the full record display in InfoSoup and will create a screencast for this process for patrons. All OWLS InfoSoup screencasts can now to be found in the Help File in Info Soup.
 - Webstats for InfoSoup are now available. The most common types of searches in Info Soup for November/December 2008 were posted on [Network News](#). Keyword, author and DVD searches were at the top of the list.
 - Network update
 - Netsupport Notify and Call-Em-All are now in place. These are products that OWLS will use to notify libraries about technical difficulties such as Internet or Millennium outages.
 - Project updates
 - The AirPAC grant application ranked highly among those submitted, however LSTA monies have not been released yet. OWLS and NFLS should receive all the money we requested for AirPAC when the federal government releases money for LSTA projects.
 - E-Commerce has been purchased and Gerri has met with Amy, OWLS' business coordinator who will handle the financial end of this project.
 - The OWLSnet manual is available online at <https://owlsnetmanual.pbwiki.com> and accessible using the extranet username and password. It will be posted on the OWLSnet website and in Network News. The manual is a work in progress and includes information about acquisitions, cataloging, circulation, statistics, etc. Feel free to comment on the pages if you feel that information is incorrect, or needs clarification. If you do comment, please

remember to use your initials and your libraries three-letter code, so we know who posted the comment.

- Three libraries have completed the SAM implementation – Hortonville, Kimberly and Little Chute. Two libraries are scheduled for implementation soon. The implementation process is more complex than anticipated – due to lots of pre-install choices, settings and configurations. Dave is developing training documents for SAM and has found pre-installation meetings to be very effective in implementing this program in the libraries.

6. Decision - consensus decision or vote

- **AAC agreed to add the text “Your library card will be required to pick up this material” on all of the hold pickup notices.** An announcement will be made when this is complete.

7. Discussion

- While OWLS recognizes member libraries’ interest in purchasing and implementing an online patron registration form, we suggest this discussion be put on hold at this time. Currently, there are many OWLS projects in progress and limited staff time to work on them. It will be a top priority when there is available project time.
- The group reviewed the document, [Library Responsibility for Out-of-State Patrons](#). There are a small number of out-of-state patrons who hold OWLSnet cards and borrow from OWLSnet libraries. While OWLSnet policy states that no local library is required to lend materials to out-of-state cardholders, these patrons are not easily identified by other libraries. OWLS staff tried to implement the OWLSnet policy by placing a pop-up message on out-of-state patron records, but this message blocked patrons from using self-check machines and became an inconvenience for some libraries. After discussing several possible solutions, **AAC agreed that libraries would take responsibility for items checked out by their out-of-state patrons.** (Out-of-state patrons are defined as those who do not live or own property in Wisconsin.) OWLSnet libraries agree to serve out-of-state patrons who hold valid OWLSnet cards, but if items are lost or damaged, libraries can bill the patron’s home agency. Individual libraries must decide whether they want to issue OWLSnet cards to out-of-state patrons.
- Technical service staff has been discussing an option to allow libraries to implement a basic serials holdings display instead of the detailed serials holdings display that all OWLSnet libraries currently use. There was quite a bit of interest. Technical Services will continue working on this and Anne will hold a class for further instruction when we are ready to make the change.
- Resource Sharing Discussion
 - The group reviewed the document [Resource Sharing Growth in OWLSnet](#). The bar graph shows the trend of increasing interlibrary loan among the OWLSnet libraries. Libraries, system staff, and Waltco are all finding it difficult to handle the volume. Many library staff members are struggling to keep up with ILL volume and still find time for the day-to-day demands of their jobs. Even now, there are some days that library items are left at the Waltco warehouse due to a lack of space on their trucks. Cost is not the biggest issue as OWLS and NELS still have affordable contracts with Waltco. However, as our volume increases, our current arrangements with Waltco may be threatened, resulting in delivery costs that the systems can’t afford.
 - The increased volume of holds has been linked to a very small percentage of OWLS cardholders. In November of 2008, for example, 28% of the total holds filled were holds placed by 5 percent of all OWLSnet patrons with holds filled, or 0.2 % of all OWLSnet cardholders. There was a moderate correlation between the average number holds filled per person, and the hold limit at that library.

- Reducing the maximum holds allowed to 15 may have a modest, but significant affect on resource sharing. Currently, OWLSnet libraries can have up to a maximum of 75 holds, and the number varies from 10 to 75. One of the consequences of this is that libraries with lower holds limits are forced to provide more items to patrons in other libraries than they choose to provide to their own patrons. Reducing the maximum number of holds would result in OWLSnet libraries providing the same opportunities for holds for all OWLSnet patrons. It would be less confusing for our patrons, provide unity among OWLSnet libraries and remove any potential pressure from patrons to raise hold limits within a single library. The OWLS board wants AAC to address the growing rate of holds and encourages the establishment of lower hold limits. The OWLS board is not likely to sign a membership agreement with Brown County until we can change our current situation.
- It's possible that lowering the hold limit to 15 will not be enough to solve the resource sharing issue if Brown County joins OWLSnet. We do expect that resource sharing will increase if Brown County joins, but reducing the hold limit increases the chances that we'll be able to handle the volume. While patrons may attempt to circumvent the system by using cards from family members, this is something that libraries currently experience. It's important to remember that most of our patrons would not be affected by this decision. Taking the data from a few different days as a sample, it appears that reducing the holds limit to 15 would affect about 0.2% of our patrons on any given day.
- We also discussed the possibility of suppressing "in processing" items in InfoSoup, so holds could not placed on these items, or charging for holds not picked up. Both of these ideas would require more staff effort with little impact on our hold numbers. Can we find a way to utilize local collection first? OWLSnet could change the scoping so patrons only see their local collections, but if/when the search is broadened the system will not unscope. Patron education will factor greatly into the overall solution of this problem regardless of what solution we choose. Libraries may want to encourage their patrons to look at the local collection first, before placing a hold within the system. Less holds means more time to educate staff and patrons about hold alternatives.
- For the next AAC meeting, OWLS will write up a proposed implementation plan (including ideas to publicize the change to our patrons) for reducing the system hold limit to a maximum of 15 holds per person. Some libraries expressed interest in a lower limit. Appleton is currently at 10 and commented they cannot accommodate a 15 hold limit. OWLS will explore the potential impact of a limit of 10 holds per person and report any findings at the next meeting. If we do change the maximum holds limit, libraries may still choose to implement a lower hold limit. We believe that reducing the maximum holds to 15 items per person would have a moderate effect on the overall system holds with a potential reduction of 10-15% in the total resource sharing volume, and that limiting the maximum holds to 10 would have a significant effect with a longer-term reduction of the holds volume.

7. Other Business

- Can OWLS implement text messaging to inform patrons of hold pickups and other Millennium notifications? Beth and Terry investigated sending text messages to our patrons and could not find a way to send text messages with our current Millennium package. Innovative does have a product to send text messages, but we would need to purchase the product.
- There are currently four blu-ray discs in the system, all of which have been purchased accidentally. The libraries agreed to remove these, and not add any additional blue-ray discs until we have further discussion. While we are prepared to implement blu-ray with scopes and

Itypes, the very tiny number makes the scope confusing and misleading. We will revisit the blue-ray discussion in another six months.

- Patrons and staff are finding it difficult to find videogames in InfoSoup. They are currently scoped with software. While we could re-scope this, there would be a charge for this from Innovative. Gerri will be seeking a quote for other scoping issues and could inquire about this one.
- OWLS is working on compiling statistics for the annual report. The state is having difficulties with their electronic form but paper forms have arrived. OWLS will not send out the paper forms until the statistics from Millennium are available. While OWLS thought that NFLS had agreed not to send out annual report information until the OWLSnet statistics were ready, several NFLS libraries reported that they had already received their packets. Please do not fill out sections 2, 3 or 11 until you get the correct figures from OWLS.
- Now that the transit slips have been implemented, we will be working on custom hold pick-up slips and spine labels. Please Gerri know if you are interested in testing either of these.

8. Adjournment

- Meeting adjourned at 2:50pm.