

## MHLS Resource Sharing Advisory Committee Meeting minutes 11/20/09

Attending: Lisa Karim, Julie Dempsey, Julie Johnson, Gillian Thorpe, Amy Raff, Daniela Pulice, Karen O'Brien, Laurie Shedrick, Josh Cohen, Merribeth Advocate, Tom Lawrence, Bonnie Snyder, Peggy Sisselman, Kit Kassel, Janet Huen.

Minutes of the 8/13/09 meeting were approved by G. Thorpe, seconded by J. Johnson. Action items were reviewed.

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New DA  
Business

### Holdings: (see Action 1)

- Background: Innovative examined why we are experiencing broken holds, and reports that many are due to libraries not clearing their hold shelf. Libraries that use the clear hold shelf function report it works well, makes it easier for staff, and helps provide the best service to patrons.
- Issue: Libraries need to follow standard holds management practices to make Millennium work properly. Training will be offered in Spring 2010.
- Recommendation: **The committee recommends that the Directors Association require that at least one staff person from each library should attend 'Mandatory Holds Management Training' in 2010.**

### Password Levels:

- More MHLS libraries are now assigning different levels of Millennium authority to staff through passwords. L. Shedrick has developed a script to automate staff using their own log-in at the circ desk to simplify changing between staff.
- L. Shedrick will send an Action Memo to initiate password updates, and will include a page of models that are successful in other libraries. (see Action 2)

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New DA  
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### Collection Agency Update: (see Action 3)

- Background: Poughkeepsie is using the Innovative module to work with a collection agency to increase getting patrons bills paid and materials returned. Has been successful in 1/3 of cases and has already paid for itself. They are only sending to collections their own (PPLD) patrons who have \$25 or more of PPLD items or fines.
- Issue: Other libraries are interested in participating in a group buy of this service. L. Shedrick will bring a report (by library) to the DA meeting of the \$1.9 million dollars currently owed in fines system wide.
- Recommendation: At DA meeting discuss a method for interested libraries to participate.

### Lost Patron Barcodes:

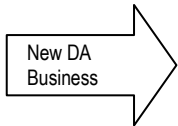
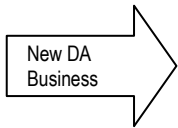
- L. Shedrick will update directions at [http://midhudson.org/resource/millennium/patron\\_record/Instructions/full\\_patron\\_entry.pdf](http://midhudson.org/resource/millennium/patron_record/Instructions/full_patron_entry.pdf) to say "if lost can delete, if want to track put LOST BARCODE in front with staff initials and date."
- L. Shedrick will mention this in her DA report, and will distribute updated directions to libraries. (see Action 5)

#### New Patron Variable Field:

- Will be added. Can be used for telephone note and other uses. (see Action 6)

#### P-Type:

- VIP: (see Action 7)
  - Recommended re-wording (for clarity) of text of Resource Sharing Standards Document re: VIP Status: **Offering VIP status is the prerogative of the assigning library if that patron is a current staff member, volunteer or trustee in good standing. VIP status must be explained in a note. If you observe an abuse of the VIP status, notify the director or supervisor.**
- New P-Type: (see Action 8)
  - Background: Libraries have asked for a way to designate patrons who are receiving homebound / extension services.
  - Issue: Committee recommends a new P-Type for use called "Outreach", with the same loan rules as VIP.
  - Recommendation: Add this wording to the text of Resource Sharing Standards Document: **Offering Outreach status is the prerogative of the assigning library for homebound/extension services use. Outreach status must be explained in a note. If you observe an abuse of the Outreach status, notify the director or supervisor.**



#### Courtesy Notices: (see Action 9)

- Background: Millennium has the built-in feature of sending patrons e-mail notification of upcoming due dates and card expirations. It is not currently enabled.
- Issue: Patrons are asking for this functionality, some using Library Elf for it. Those who do not want it they can opt out through "block sender" in their e-mail.
- Recommendation: **Enable the Millennium Courtesy Notice e-mail reminder system to send emails to patrons to remind them 3 days before their item is due or their card expires.**

#### Music CD loan rules:

- Background: Music CDs are in high demand and not many libraries purchase them, so this material type has a long hold queue.
- Issue: A shorter standard loan period would move them around faster and still fill patron needs. They could be renewed if there is no one waiting.
- Recommendation: The committee encourages libraries to adopt a one week loan period for music CDs, with renewals.

#### My List:

- Committee agrees with the Marketing & Program Advisory Committee recommendation to add 'My List' to the cart page in the OPAC.
- Suggestion to make 'Return to List' button in OPAC say 'Return to Browse' to avoid confusion. (see Action 10)

Committee Chair 2010: Amy Raff

Actions:

1. Send to DA for New Business: **Holds: Clearing Shelf and Training**
2. L. Shedrick will send an Action Memo to initiate Millennium password updates.
3. Send to DA for New Business: **Collection Agency Update**. L. Shedrick will bring a report of the \$ owed system wide, by library, to the December meeting.
4. L. Shedrick will remind Directors at the December DA meeting that the Resource Sharing Standards Document Review will be on the January DA agenda.
5. L. Shedrick will update the Lost Patron Barcode directions and distribute to each library in the delivery. She will mention this in her December DA report.
6. L. Shedrick will add a new patron variable field.
7. Send to DA for Old Business: **Recommended wording of text for Resource Sharing Standards Document re: VIP Status.**
8. Send to DA for New Business: **New P-Type for homebound and extension services.**
9. Send to DA for New Business: **Courtesy Notices**
10. For next meeting MHLS staff will see how RCLS and WLS list E-Books as material type.
11. L. Shedrick will investigate adding the "More Like This" button to the OPAC.

Upcoming 2010 meeting dates: 1/14 (snowdate if needed 1/15), 3/17 (snowdate if needed 3/18), 5/18, 8/18, 11/19.