MHLS Directors Association
Business Meeting of Friday, September 6, 2019

Action Item #2: Online Registration Available in Encore

Background: The opportunity to create an account online is expected in today's digital environment, particularly as libraries offer and publicize more online resources.

Issue: We do not currently offer the opportunity to open an account in the online catalog (also known as Encore or the OPC) environment.

Recommendation: Including a button to a new "Get A Library Card" page from the front of the online catalog will expand the opportunity for residents to become patrons and use their library, while removing the obstacle of figuring out how to do it. Each library can supply information including their process for account registration. An action memo would be distributed to ask what information the library wishes to have linked to the Get a Library Card page.

See: Get a Library Card: https://midhudson.org/get-a-library-card/
Status: Discussed at the August 6 RSAC meeting; Action Item at September 6 DA meeting.

Action Item #3: Town Code Field Revisions

Background: The Town Code field in Sierra was developed to be used for gathering statistical information beyond what can be provided in the home library or Zip Code field. The Town Code field helps to define more closely where the patron resides. It becomes a very powerful field in examining the boundaries related to the financial support of member libraries at the local level, and is critical in defining how an outside community is impacting a particular library.

Issue: The original build of the list was not comprehensive in defining communities to the extent that is needed today. Expanding the list to include all towns, taxing districts and areas of overlap would improve the ability to report on and understand the use of our library collections and services. The Town Code field is managed in Sierra as a fixed field in a numeric table. The statistics and indexing are accomplished through the table line number and not the label or name in the field. Moving elements to new lines will disrupt the continuity of the reports. Historically, we have simply tacked new additions to the end of the list.

Recommendation: The Resource Sharing Advisory Committee endorses the need to expand the list to include the necessary towns and taxing districts. The committee recommends that the new additions be grouped as best as possible and added to the end of the standing list, if the additions are found to be few. The change would ideally take place at the end of the calendar year to create a clean demarcation line for statistical purposes.

Status: Discussed at the August 6 RSAC meeting; Action Item at Sept. 6 DA meeting.

Action Item #4: Ptype as Library Affiliation indicator, freeing HomeLibrary to be used as a Patron Pickup default indicator

Background: The Patron record in Sierra has two fields that currently define the patron affiliation: Ptype and Home Library. In a recent release, the ability to select a default pickup location in the online catalog, has been tied to the Home Library field. Currently libraries rely on the Home Library field to identify the library patron

affiliation. The Home Library field is also used in statistical reports, including the State Annual Report, and in authentication with vendors.

Issue: Patrons routinely pickup items at libraries other than their own library. Being able to set the default pickup location to a library other than their own, requires giving them edit access to the Home Library field from within their Encore accessed account. If that change is made, the field will no longer be available to determine which library a patron is affiliated with as a taxpayer. The PType field will exclusively define to which library the patron is affiliated. In the case of non-residents, whose PType currently does not define affiliation, the PType codes could be expanded to include each library with a non-resident PType. (example: Patterson- non-resident)

Recommendation: The Resource Sharing Advisory Committee recommends that the Home Library field no longer be used as a means of affiliating a patron with a member library. Instead this designation should be defined by the PType exclusively. The purpose is to provide a more streamlined process to patrons placing holds in selecting a default pickup location.

Status: Discussed at the August 6 RSAC meeting; Action Item at Sept. 6 DA meeting.

Action Item #5: New Material Types for "e" content

Background: Identifying discrete Material Types helps users to refine their search in the catalog, staff to manage collections, and report statistically at a more granular level. As we begin to bring in new types of material in the form of streaming and e content, we need to expand our current definitions.

Issue: We are currently using e-resources to define any content that is available online, with the exception of e books, e audio and e video.

Recommendation: The Resource Sharing Advisory Committee recommends that the following material types be added to our Sierra interface.
eComics, eMusic, eCourses

Status: Discussed at the August 6 RSAC meeting; Action Item at September 6 DA meeting.

Action Item #6: Approval of Guidelines for OverDrive Collection Developed with Central Library Development Aid (CLDA) and Central Book Aid (CBA) Funds

Background: CLDA/CBA funds are appropriate annually by the MHLS Central Library/Collection Development Advisory Committee to cover a portion of the non-fiction content in the shared OverDrive collection.

Issue: With the advent of Advantage accounts and local preference in the OverDrive collection the guidelines for collection development needed to be updated.

Recommendation: The committee recommends the attached draft be adopted by the DA to reflect the changes in purchasing ability by member libraries and functionality of OverDrive.

Status: Discussed at the 3.20.19, 5.6.19, and 8.22.19 CL/CD meetings; Action Item at September 6 DA meeting

Action Item #7: Guidelines for OverDrive Collections Developed with Advantage Plus Accounts

Background: Beginning in 2019, MHLS implemented a cost-shared eAudiobook and eBook collection with central purchasing by MHLS staff. As of 2019, MHLS no longer collects cost-share funds to spend on the shared collection. Individual libraries use OverDrive Advantage Accounts to build their own collections.

Issue: This guideline document was previously integrated with the document that guided purchases with CLDA/CBA funds. It has been drafted with member library directors as the audience to solely focus on Advantage accounts .

Recommendation: The committee recommends the attached draft be adopted by the DA to reflect the changes in purchasing ability by member libraries and functionality of OverDrive.

Status: Discussed at the 3.20.19, 5.6.19, and 8.22.19 CL/CD meetings; Action Item at September 6 DA meeting