**URSUS Libraries Circulation Heads**

**Fall 2017 Meeting Minutes**

**Tuesday, November 7, 2017**

**10:00am - 2:00pm**

**Maine State Library**

Augusta: Megan York (LAW), Jerry Lund (UM Orono), Michelle Daigle (UMA-Bangor),

Barbara Higgins (BPL), Jim Roy (MSL), Elaine Apostola and Susan Beane (MSLLRL), Alisia Revitt (MIN), Andrea Thorne (UMA), Jess Isler (UMF), Ed Moore and Bill Sargent (USM), Kathleen Spahn (PPL)

Polycom: Deb Durkin (UMFK), Michelle Greene (UMPI), Marianne Thibodeau (UMM)

* Jess Isler appointed secretary for meeting
* April 4, 2017 meeting minutes approved
* **Announcements & Introductions**:

Megan: LAW will be having pie and therapy dogs, Marianne: Machias will be having a new reading group and accompanying documentary film screening, Jim: MSL purchased 100 new totes for deliveries, Elaine: MSLLRL honored longtime staffer and recent retiree Sue Wright with thoughtful memento of service to both their library and at BPL, and Susan Beane will be attending Circ Heads meetings in Elaine’s stead going forward, Andrea: UMA experiencing staffing challenges due to 2 failed searches, staff attrition and illness, Jess: UMF has opened voting for a photography contest in relation to the library’s community reading program with books featuring a theme of “Live Travel Adventure”, Ed: 3 of USM Gorham campus library’s group study rooms were subject to a student design project involving upgrades and creative touches (e.g., environmental studies students decorated a room with birch branches and wooden bench) and the changes are intended to be permanent, Ed will be presenting a poster session on this topic at the [Access Services Conference](http://www.accessservicesconference.org/2017-schedule/) in Atlanta later this month, Bill: USM Portland has purchased board games and hosts a popular game night on Mondays and is exploring lending games as part of regular collection, Thoreau exhibit in relation to a course, Kathleen: PPL is moving forward with a pilot of a student library card project that they’ve been dreaming of implementing for years, thanks to an MOU with the city and advice from the Urban Libraries Council, the pilot will include 2 schools to start, and the MOU addresses privacy and data use practices (parents may opt-out their children from participating), and it will allow the students to access PPL’s electronic resources with their library cards away from the library. Alisia notes some Minerva libraries include school library cards for local students but the data stored is limited due to FERPA rules.

* **Opening up the meeting to other libraries or committees**:

Best practices document mentioned making connections with other consortia or groups, Ana Noriega had reached out to Jerry regarding the possibility of Stephanie Frost at Colby’s Miller Library possibly attending a meeting. Megan notes some of the details may not be relevant for guests, but suggests the possibility of opening up one meeting per year or adding a meeting. Elaine notes that even when topics are not relevant to the Law & Legislative Reference Library she still finds the meetings valuable. Ed notes that we could ask them to bring agenda items and for our group to consider topics of relevance to others. Possibility of inviting them to Development Day although that format may change according to Marianne. Alisia suggests other Circ Heads groups such as Minerva Circ Heads, or other committees. Suggestion to divide meeting into URSUS business and business relevant to all including guests.

* Reminder that Catherine Preston-Schreck at College of the Atlantic has started a **Google Group Coordinators of Academic Library Student Employees** to facilitate discussions. Deb and others have found the discussions to be useful so far (e.g., recently scheduling was discussed), and Catherine intends to pose regular questions to keep the discussion going. Contact Catherine to be added to the group: cpreston-schreck@coa.edu
* Related to this, Megan asks how others deal with mandatory training for new student workers. Some have group training sessions, others train individually, and others use a combination of both. Many are dealing with challenges related to work study funding declining and minimum wage increases (meaning students can work fewer hours per week, and need more reminders and remedial training to keep up). Some have used manuals online and in print, with varying degrees of success. Several libraries use Google Groups to communicate with students and for shift swapping and sub requests. For more on these topics, join the discussion group!
* **Billing fee eliminated**:

All URSUS Libraries are eliminating a $5 automatic billing fee that had remained on a patron’s account after a billed item was returned. In other words, there are no remaining inter-library fees after items are returned. Libraries will need to review their own patron accounts to waive these fees that had already been assessed. Clarified that there will be no change to the notices as a result of this change (patrons will just not get a notice about the fee). This may help libraries that wish to periodically clean patron databases by allowing them to remove expired patron accounts that linger in the system due to outstanding billing fees.

* **Circulation Manual approved**:

The edited manual was approved by the URSUS Directors and is understood to be a living document. For example, the Fees section will need to be updated to reflect the elimination of the $5 billing fee.

* **Recall problem**:

Barbara notes that BPL was experiencing issues with items being recalled. A change to a loan rule (changing the default circulation period from 3 weeks to 2 weeks for very popular items) has remedied the situation. Jerry notes the ability to recall was helpful in the past for academic libraries to retrieve items intended for Reserves, but he and Ed note that it is sometimes more effective to email patrons directly than send a system-generated recall notice. Usually the direct contact is more effective.

* Jess asks about a related problem with the “Minimum Use” limit in loan rules for highly-requested titles. Farmington had been experiencing a problem when checking out popular titles with a loan period of 2 weeks (books which are not requestable by other libraries), having the loan periods change to 1 week because of so many holds on the title. Alisia explains if the Minimum Use reaches a certain threshold the loan period is automatically adjusted to 1 week earlier than the loan rule default (even if the items are not requestable). Jess will send details to the group for consideration to change this.
* **Material Type searching inconsistencies** in the public catalog:

Barbara brings up an example of inconsistencies in assisting a patron searching by material type “audiobook”. Some audiobooks are assigned the “sound, non-music” material type, and some use “audiobook”. There is a possibility that audiobook was a recently-added material type in Sierra and some “sound, non-music” material types haven’t been switched. Minerva has a definition for its cataloging group for when to use each designation. Consensus that we will ask the Cataloging Standards group to define guidelines for when to apply “audiobook” and “sound, non-music” to improve patron discovery in the catalog. Megan will reach out to Cataloging Standards Chair Cason Snow of Fogler Library at UM.

* **Statistics**:

Megan asks how other libraries accounting for patron traffic, space use, and other types of statistics? Recently started counting patrons in spaces 4 times per day. Some libraries have gate counts and some do not. Jerry’s Google webform includes checks of equipment in the building (e.g., copiers), and there is a possibility to measure sound/decibel levels as well. Jess also uses a Google webform and students count hourly at 15 minutes to the hour. Ed’s students count hourly at 10 minutes to the hour. Several staff note the benefit of having workers walk through the building and increase visibility and awareness that they are available to help patrons.

* **SMS (text-message) notices from URSUS**:

Text message notices from URSUS (e.g., book on holdshelf, due date reminders) are currently available as an opt-in for all patrons in View Library Account <http://ursus.maine.edu/patroninfo> under Modify Personal Information. Kathleen asks who is using this, how well is it working, etc.? Some have tested it. MSL has signage about it in the library building. It can be helpful for people who prefer to receive texts instead of email notices for pickups and due dates. Texting RENEW renews all items that are eligible to be renewed, not just the thing you received a notice about. The texts also include a link to log in to View Library Account, because most users who sign up for text alerts are using smartphones.

* **Paging Slips**:

When are the new paging slips going into effect? New paging slips are ready to go except UMA is the only location that cannot print. A driver needs to be installed on the UMA copier. There is a workaround option to send the slips to email and then print. There are options to automatically email notices on a set schedule as well. Alisia will let everyone know before the new slips go live.

* Presentation on new iii features:

**Mobile Worklists** is available now for free download by visiting the Apple App Store for iOS devices, only (iii says it is developing an Android version for release someday). The idea is to be able to use some list functionality in a portable way. Uses device camera to scan barcodes and create lists, or you can import a list that is already created. Suggested uses include inventory, weeding, pulling items for display, checking reshelving, missing items searching, etc. Slide right stars items for further action, Tap to see more details (though not all parts of bib or item records). These are not “live” lists in Sierra and need to be exported or synced manually, and the records cannot be edited (but you can edit when back on the Sierra client). Unlike some other functions in Sierra it is difficult to make any mistakes with records using Mobile Worklists.

**Encore** (discovery layer for the URSUS Catalog)

MOBIUS example: <https://searchmobius.org/iii/encore/;jsessionid=3B25DF9754AB799558CC8B2D7707BB89?lang=eng>

URSUS test coming soon, MaineCat test version: searchmainecat.maine.edu (This is not ready for public consumption yet! Requests will be live if you use this so please use caution).

Encore basically gives the public catalog a facelift and more features to use such as facets for narrowing searches, filters, brief record views, emailing lists, citation management, requesting a list of items, etc. It is an alternate to the current URSUS opac but not a replacement as some functions (e.g., requesting) will still bring the user to that traditional interface. Search is geared towards keyword searching, and suggests spelling corrections, ISBN and ISSN search are in the box as well. Advanced searching allows author, title, subject searches but no call number yet. More options such as similar items, popular items, recently added, and other catalogs on right of record detail page. Alisia confirms it will be possible to put multiple items in a bag and request all at once in URSUS (hooray), but MaineCat will still be one-at-a-time. Send questions to MIN for review.

**Decision Center** statistics module to replace web management reports

>150 reports covering the areas of evaluation, development, balancing, and maintenance

Encore needs to be live before Decision Center can work

Export options to Excel, tab delimited, etc. Possible uses for Acquisitions, e.g., hold-to-item radio buying, etc. Floating management options, e.g., drought/pooling stats. Subject use by location, weeding by use, etc. Reporting tools are fairly rigid so it is okay to experiment and difficult to mess up the reports. Alisia will send manual links about Decision Center.

**Program Registration** events scheduling and signups

Scheduled events signups

Program records (act as a bib record): Name, description, link to image, etc.

Session records (act as item record): each time the Program will be held-with registration details

Register: x of x spots available

To sign up to register you would need a library barcode

Registration desk can allow event organizer to check-in people to the event and confirm patrons are registered and take attendance.

Question about whether or not the locations can be scoped so we wouldn’t all be seeing events at each URSUS library. In Sierra we would still all see all the locations. Limit by type of event could possibly be changed to locations. Alisia will send manual links, if you want to test this, send a ticket to MIN to request program management permissions, and they will assist with setup and questions.

Spring meeting scheduled for Tuesday, April 3, 2018.