

SPRING 2018 URSUS CIRCULATION HEADS MEETING

Maine State Library - Augusta, ME

April 3rd, 2018

10:00 AM–2:00 PM

ATTENDANCE: AUGUSTA: Megan York (LAW), Jerry Lund (UM), Kathleen Spahn (PPL), Michelle Daigle (UMA-Bangor), Barbara Higgins (BPL), Jess Isler (UMF), Susan Beane (LEG), Ed Moore (USM-GOR), Bill Sargent (USM-POR), Jim Roy (MSL), Andrea Thorne (UMA). POLYCOM: Deb Durkin (UMFK), Michelle Greene (UMPI), Ben Noeske (UMM). NOT PRESENT: Stacey Brownlie (OCLS), Dale Kuczinski (LAC), Maine InfoNet.

SCHEDULE:

9:45 AM–10:00 AM: Arrival

10:00 AM–12:00 PM: Discussion

12:00 PM–12:45 PM: Lunch break

12:45 PM–2:00 PM: Discussion

2:00 PM: Adjourn

AGENDA:

1. **Fall 2017 minutes** approved.
2. **Introductions, Campus Updates, News, & Announcements.**
 - a. Megan York (MaineLaw). Started weekly Knit & Listen on Fridays for the students and staff. Good feedback so far. National Library Week plans for an Open House.
 - b. Deb Durkin (UMFK). Huge weeding project underway. Received approval for asbestos removal and must swap collection between two floors for abatement to take place. UMPI and UMFK might collaborate to share educational materials.
 - c. Ben Noeske (UMM). Weeding recordings from the collection.
 - d. Michelle Greene (UMPI). Hired a temporary employee until August (possibly longer). Six hundred fifty books added to collection. Working with Fort Kent to share nursing materials. Two-thousand-title Juvenile Collection returning to library after being housed in the Education Department in Folsom Hall. The project begins in late spring and run into summer. Conducting an inventory and a Special Collections project.
 - e. Ed Moore (USM-Gorham). Began discussions with Admissions Office about Gorham Library remaining open on Labor Day weekend—not a lot of turnout on this day. Arranged the level 2 quiet area to resolve noise issues. Gate numbers are increasing (reversing a downward trend). Student groups decorated the new Thoreau Study Room. Cataloging donation of over 200 CDs (mostly Classical music).
 - f. Jess Isler (UMF). Removed security gate from Mantor Library and alarmed doors away from the main entrances. This will save \$3,700/year, provide better accessibility for patrons, and eliminate false alarms. UMF President is leaving. Search for a Provost continues. Increased enrollment is anticipated due to new May and June terms.
 - g. Andrea Thorne (UMA). Library Specialist CL2 position search to fill Rebecca Whitten's vacancy. Second annual Clothing Swap. Still weeding and shifting collection. Katz Library Work Study students, who are ILS majors, received certificates for Circulation training.

- h. Kathleen Spahn (PPL). Portland Public Library has gone live with library cards distributed to all students in Portland schools. Lots of classroom use anticipated. Weeding nonfiction areas.
 - i. Jim Roy (MSL). Weeding project targeting Dewey 300s call numbers. Mobile Work Lists used to facilitate this project. Additional laptops purchased for patrons, these are available for 10-hour in-house-use only. First-time borrowers must sign an agreement prior to checking-out a laptop.
 - j. Michelle Daigle (UMA-Bangor). Relocated a wooden bookshelf that obstructed view of Circulation Desk. Cafe area established (in conjunction with Student Government) that provides free coffee to students. Shifting project underway to fill an empty section. Google Form and Sheet created to record Nottage Library usage. Student assistants record patron counts and questions directly into a Google Form.
 - k. Barbara Higgins (BPL). "March Madness" contest held to determine which author's books would be moved from cellar stacks to popular books section. Two hundred patrons participated and chose Neil Gaiman as winner. BPL Tweeted Gaiman about this event—he Retweeted the post! BPL Director Barbara McDade retiring in May.
 - l. Jerry Lund (UM). Conducting search to fill Library Specialist CL2 position to become vacant mid-May. Moving most frequently used Dewey books from storage to Presidents Room over summer.
3. **Library Events** (Megan York)
- a. Maine Academic Libraries Day, Colby College, Thursday, May 31st.
 - b. URSUS Staff Development Day, Wells Conference Center, UM Orono, Wednesday, July 25th.
 - c. Maine InfoNet Pre-Conference, Sunday, September 30th, Sunday River, Newry.
 - d. Maine Library Association Conference, Monday–Tuesday, October 1–2, Sunday River, Newry.
4. **Freedom XPress (FX) Tour/Miscellaneous Courier Items**
- a. Ed Moore found tour informative.
 - b. Clarification requested about how many library sorting facilities FX operates in Maine. *Destiny Osgood, FX, confirmed Portland is now their only sorting facility.*
 - c. FX does not have lost-and-found at their sorting facility. They open unaddressed bags to determine item destinations; otherwise, they do not open bags and sealed totes. MSL, BPL, UMA run in-transit lists and search for these items at their respective locations; if not found, they share lists with other URSUS libraries. BPL searches 6 months before changing in-transit item record status to missing. FX requests that libraries submit label code information when reporting delivery problems.
 - d. Jim Roy (MSL) said to notify FX if you need totes and to send your surplus totes to FX's warehouse for redistribution. Notify MELIBS when you are short of bags; Jim monitors the listserv and redistributes bags when he is aware of need. MSL recently purchased bags to alleviate shortage issues—these are plain and have no marks indicating ownership.
5. **Circulation Manual** (Megan York)
- a. Confirm recent billing changes. Focus on Section V: Requestor Function Loans.
 - b. Staff may override to renew billed items.
 - c. Complete Appendix C.

- d. Circulation Heads manual and its contact list are posted at:
<http://www.maineinfonet.org/ursus/committees/circheads/>
6. **Billing Process** (Deb Durkin)
- a. James Jackson Sanborn (Maine InfoNet) authorized waving \$10 INN-Reach billing fees provided that corresponding items have been returned. These billing fees will continue to incur and will periodically have to be purged from patron records. Expired patron records have lingered in the database for years (due to these billing fees) and this measure will help with records management.
 - b. Deb (UMFK) wants better and consistent communication among libraries regarding fee collection. She suggests creating a notification policy and procedures. When a replacement invoice is paid by a system library (whose patron borrowed the respective item), it notifies the owing library of that payment. Deb recommended sending a memo to the library Directors requesting communication of payments to Circulation departments. Is there a way for the library Business Office to inform Circulation and Technical Services once payment has been received? Circulation Heads will submit how transactions are handled on their campus. Responses will be compiled, shared, and discussed.
7. **Maine InfoNet Update: Decision Center & Mobile Worklists** (Megan York). *Nelson Eubanks (Maine InfoNet) was not able to attend and submitted the following (which has been edited for the minutes).*
- a. **Decision Center (DC)**
 - i. <https://dc-umain.iii.com>. Login: dcumain1. Password: umber1. All URSUS staff will use this login for access. DC is for library staff use only.
 - ii. Back end mapping is still occurring and anticipated to be ready within 2 months. Reports can be run now, but not for any actual statistics reporting. Lynn Uhlman (Maine InfoNet) will attend a special session at IUG (Innovative Users Group) in late April about DC versus Web Management Reports (WMR). Initial discussions among IUG libraries indicate some reports in WMR cannot be duplicated in DC and the presentation will seek to address this—it may be that WMR will still have to be used in conjunction with DC. We should have more details post IUG.
 - iii. Current III resources for DC
<https://csdirect.iii.com/documentation/decisioncenter.php>
 Password for Ursus staff only: Umain. Pollen8.
 - iv. Lynn Uhlman is also working on documentation for once back end setup is complete.
 - b. **Encore**
 - i. <http://searchursus.maine.edu>
 - ii. Encore is close to going live, but final adjustments are still being made. While Encore will be default search option once live, users can still choose the traditional webpac.
 - c. **Sierra Software Updates**
 - i. Currently all Maine InfoNet systems use Sierra Build 3.3. Upgrade to current stable build 3.5 will take place in about 4 weeks (after library hours to minimize patron disruption). Twitter and listservs will be used to announce actual date.
 - ii. Sierra 4.0, a significant update, is in beta testing with full release expected within 1-2 months. Upgrade to URSUS and other systems is anticipated to occur in

summer 2018. More information about the 4.0 changes will be announced prior to installation. This update will be discussed at IUG.

- d. **Alisia Revitt** is expected to start part time work soon. She is anticipated to resume full time work in May.
 - e. **Circulation Heads Comments**
 - i. Jess Isler (UMF). URSUS Technology Group is working with Encore, an improvement over the existing version of URSUS. See searchursus.maine.edu.
 - ii. URSUS Academic library patron barcode "prelinking" planned to begin in summer 2018. Few patrons will need to have a barcode linked by library staff given this will be processed by Maine InfoNet in advance. Jess is looking forward to this labor-saving measure.
 - iii. Mobile Work Lists (MWLs) are used in creative ways at Portland Public Library. Kathleen Spahn uses these lists for renovation projects, suppressions, and as a training tool to test shelvees. The mobile app is handy for scanning items to compile lists. She notes the mobile app has a lot of potential. An iPod or iPhone is easier to handle than an iPad. *Kathleen attended an IUG (Innovative Users Group) conference after our meeting and learned the following: MWLs cannot yet be used to bring paging lists to the stacks or to change a pulled item's status. These features and Android development have been put on hold.*
 - iv. Deb Durkin sent a ticket to Maine Infonet given Mobile Work Lists not operating correctly for her. Innovative Interfaces will need to intervene to resolve the issue.
8. **Paging Slips** (Ben Noeske). Paging slips template testing took place last year at each URSUS library; however, Katz library at UMA is still not able to generate slips. Alisia Revitt wants all URSUS libraries to transition to new slips on the same date. Printing issues at Katz Library need to be resolved before proceeding with the new slips. Ben and Jerry will work with Maine InfoNet to expedite generation of new paging slips.
9. **Sending Requested Items to Sites & Centers** (Andrea Thorne). Andrea asked that URSUS Libraries staff remember to check-out materials being sent directly to University of Maine System Centers and Sites. She asks to process high school requests through interlibrary loan. *These locations are not equipped to process transactions in Sierra and item activity (i.e., pickup/return) is recorded manually on a log sheet.*
10. **Floating Collections** (Deb Durkin)
 - a. Deb asked which library is responsible for replacing damaged items.
 - b. Only Farmington, Fort Kent, and USM (Portland, Gorham, and Lewiston/Auburn) float their general collections. They are all satisfied and have experienced no major issues.
 - c. Barbara Higgins, Bangor Public Library, is concerned about having space for Library of Congress call numbers given BPL's high circulation. Portland Public Library, to keep collections balanced, does not even float among its branch libraries.
11. **Handling Records of Deceased Patrons** (Jerry Lund)
 - a. Jerry receives notification of deceased students from UM Office of Student Records. He immediately deletes the deceased patron's record if it has no items attached. Otherwise, he removes contact information and adds a note to record.
 - b. Jerry recommends Circulation Heads on other campuses ask to be placed on an email distribution list for deceased students.

- c. Barbara Higgins, Bangor Public Library, removes items from patron record, changes status of each item to missing, and deletes patron's record. She also checks with owning libraries when INN-Reach items are involved. Kathleen Spahn, Portland Public Library, removes items from patron's record and changes each item's status to missing.
- d. Related discussion about books destroyed by fire. Barbara Higgins said she has never had a lending library request payment for items destroyed in a house fire.

12. **Meetings** (Deb Durkin)

- a. Discussion about balancing in-person meeting attendance with finding an acceptable central meeting location has been tabled for now. *Holding meetings in Augusta results in the majority of Circulation Heads attending at a single location thereby reducing the number of Polycom participants. On the other hand, Augusta is 75 minutes south of Bangor and results in an additional 2.5 hours of driving (round trip) for those attending from northern and eastern Maine. It is generally agreed that Polycom is not an ideal way to meet. It is also felt that driving several hours to attend a meeting is not equitable. Deb noted that all other library committees (i.e., Reference, Cataloging, and Directors) meet centrally to ensure fair access to all members. Last spring, Circulation Heads decided to alternate meetings between Bangor and Augusta. Unfortunately, the last two meetings in a row were held in Augusta.*
- b. Bangor Public Library will host the next two Circulation Heads meetings, the next of which will be held on Tuesday, October 30th.

13. **INN-Reach Slips Paged Too Long** (Barbara Higgins)

- a. INN-Reach Paged Too Long reports identify items that patrons at other locations have requested, but did not receive. Barbara asks that URSUS libraries clear these items by either filling holds (and sending items) or by cancelling holds. This is especially helpful given Bangor Public Library's high volume. URSUS wide participation in this process is key in any attempt to persuade Minerva libraries to do likewise.
- b. Talk about INN-Reach reports at the next staff development day and get a Minerva chair to attend.

14. **Minerva Billing Process**

- a. Andrea Thorne (UMA). Invoices are the only communication received from Minerva libraries about unreturned items. It would be helpful to receive a courtesy memo prior to an invoice.
- b. Jim Roy (MSL) thought the 25-day billing period is too short.