DRAFT
MID-HUDSON LIBRARY SYSTEM
Resource Sharing Advisory Committee Meeting

Date: 9/16/14   **Location:** MHLS

Committee members attending:
- x   Sally Alderdice&Karen Garafalo (Columbia)
- x   Daniela Pulice (Dutchess)
- x   Gloria Goverman (Dutchess)
- x   Linda Deubert (Greene)

- x   Jeanne Buck (Putnam)
- x   Julie Dempsey (Ulster)
-     Amy Raff (Ulster)
- x   Robert Drake (MHLS)

Staff Attending: Merribeth Advocate, Tom O'Connell
Others Attending: Tom Lawrence (PPLD), Janet Huen (PPLD), Julie DeLisle (CHA)

Minutes from 7/10/14 were reviewed and approved.

Action Items:
1. Create Sierra group log-ins. Robert reported that several libraries have volunteered to be first to implement the new group log-ins and he is setting those libraries up first with other libraries to follow.

Discussion Items:
Genre Update
1. Robert reported that iii highly recommends not adding genre to the facet search at this time. A genre facet is planned for the next update which is expected in the spring and adding it now will cause problems later. The Committee concurred with the recommendation.

Encore Databases and ILL Policy
1. Robert demonstrated what would happen if a patron attempts to access a database through Encore that their home library does not subscribe to. The patron receives the message "403 Forbidden. You are not permitted to access this database." This error message cannot be changed.   In light of this negative message, the Committee recommended that only databases available to all library cardholders be included in the catalog. This eliminated the need to create an ILL database policy as this time.

Expired Library Cards Best Practice
1. Robert reported over the past 2 months Tech Services helped 87 patrons who were unable to access OverDrive because their library card had expired. This creates a customer service issue as well as extra work for Tech Services. The Committee recommends that as a best practice libraries use create list to run a monthly list of their patrons who have library cards which are about to expire and notify those patrons. The method and wording of the notification will be a local decision but it was noted that Resource Sharing guidelines state a card can be updated "after proper ID is shown". A guide will be created explaining how to run a create list for patrons whose library cards are about to expire.
2. The practice of having MHLS annually purge the system of patrons whose library cards have been expired for three years and who owe less than $10 was discussed.   Having patrons in the system who have not been active for over three years adversely affects circulation statistics and inflates database costs. The Committee recommends that Mid-Hudson annually delete from the

system patrons whose library cards have been expired for three years and who owe less than $10.

Staff Trainings/Review of Sierra Guide
1. Eight trainings are planned for 2015, two sessions for each topic: Create List, Web Management Reports, Patron Data Entry and Cataloguing/Data Entry.
2. A draft Sierra Guide was distributed. The Committee felt a paper manual would not be used enough to justify the work required to produce it and recommended the project not be continued. It can be revisited at another time if necessary.

Other
1. TNS Problems: Issues with calls going through were discussed. The system currently holds call information for fourteen days. The Committee recommends the information be held for thirty days. Robert will make the change.
2. Database Tab: The Committee recommends adding a third tab to the catalog for articles only. The tabs will read "Catalog", "Catalog Plus Articles", "Articles".

DA Action Items:
#1 Notification of Library Card Expiration
- Background: Many library patrons do not discover their library cards have expired until they attempt to access OverDrive. This frustrates patrons and creates unnecessary work for Tech Services.
- Issue: Improve customer service by notifying patrons their library cards are about to expire.
- Recommendation: Establish a best practice of creating a monthly list of patrons whose library cards are about to expire and notifying those patrons to have their card updated.

#2 Purging Patron Cards Expired More Than 3 Years
- Background: There are many inactive patrons who have library cards that have been expired for over three years in the patron database.
- Issue: This inflated number of patrons adversely affects circulation statics and inflates database costs.
- Recommendation: Mid-Hudson should annually purge the database of all patrons who have library cards that have been expired for three years and owe less than $10.

#3 Adding 'Articles' Tab to Encore Catalog
- Background: The Encore catalog currently has tabs for "Catalog" and "Catalog Plus Articles". There is no tab for patrons interested in accessing only articles.
- Issue: Improve access to databases.
- Recommendation: Add a third tab for articles only to the catalog. The tabs will read "Catalog", "Catalog Plus Articles", and "Articles".

Next Scheduled Meeting: November 24, 2014
Minutes recorded by Jeanne Buck