

Discussion/Action Items
PINES Executive Committee Meeting
May 19, 2004

1. Patron Placed Holds

In reviewing the results of the recent PINES User Survey (and I'll be sharing those results with everyone as soon as we can compile them), it's clear that the number one suggestion for improving PINES from our users is that patrons be allowed to place their own holds system-wide. They don't understand why they can't place holds outside their home systems.

As we are currently making plans to implement a PINES delivery system that will eliminate the need for mailing packages, we would like to take a new look at patron-placed holds. Once the delivery system is in place, would you support patron-placed holds at the system range? What concerns do you have?

Subcommittee recommendation: Most subcommittee members are in favor of allowing users to place their own holds system-wide IF the holds map correctly prevents holds on items not currently sent outside the owning system. Concerns included whether the holds map does work reliably; whether the delivery service will be in place soon; whether holds will increase significantly. One concern dealt with a user placing a hold on an item that is on the shelf in his home library. If another copy is checked in before his home library pulls the item, a copy will be sent, even though his home copy is available. We have determined that we can change settings to prevent this possibility.

While there is growing support for patron-placed, system-range holds, the subcommittees did not choose to issue a recommendation at this time. The PINES staff does support this change as the most-requested idea we hear from patrons, and as another step in resource sharing in PINES.

The Executive Committee tabled the question of allowing patrons to place system-range holds until the next meeting. Once the delivery service is in place, they wish to consider this issue.

2. New Item type-GENEALOGY

A PINES library has submitted a request for a new Item type of GENEALOGY.

“In an effort to streamline the process of gathering statistical information to satisfy GASB requirements, we request the addition of ITEM TYPE = GENEALOGY.

Currently, genealogical items are cataloged using existing PINES item types (book, new-book, reference, etc.) Using existing item types result in reports that require excessive

manipulation to exclude genealogical items, which are not capitalized and therefore report erroneously inflated values of collections to be capitalized.

As stated in the Georgia Public Libraries' "Capital Asset Guide", July 2003, page 15....

"Many libraries hold genealogical or local historical collections where the collection items are not generally available for checkout, but are held for the public to view and use on the library premises. Such collections are considered non-material for general collection capitalization purposes, generally not disposed of and do not depreciate in value. Such collections should not be capitalized or depreciated."

The addition of ITEM TYPE = GENEALOGY would provide the ability to exclude genealogical items by making the appropriate selections during report queue, resulting in reports that accurately reflect the value of collections to be capitalized, while excluding those which are not capitalized."

Subcommittee Recommendation: The consensus from the subcommittees was that item type should represent what type of material the item is. It was noted that if you put all of your genealogy items with an item type of GENEALOGY, then all books, microfilm, maps, and etc. would be covered by this item type. This would cause problems when one might need to know how many microfilm, maps, and etc. are located in the genealogy collection. Suggestions were made that this information could be obtained by running a report with home location of genealogy with the various item types broken down. The resulting number could then be subtracted from the total number of that item type. There were a total of 19 votes. 16 voted No and 3 voted Yes.

The Executive Committee denied the request for an item type of GENEALOGY, recommending that a Home Location be used to track genealogy items.

3. User Profile- BADADDRESS

This discussion continues one from several months ago. We had hoped that we could find a way to solve the problem of stopping users at checkout when they needed special attention, such as address changes. Since the Executive Committee affirmed that the user status BARRED is to be used for only serious offenses, it is not appropriate for use in these cases. SIRSI had advised, inaccurately, that we could manually set a status of BLOCKED; however, our own testing confirmed that the manually-set BLOCKED status is removed by the overnight processes if the user does not hit the \$10/10 overdue items threshold. We *then* asked if we could add a new user status of our own; the answer was NO, even if we paid for custom programming.

So, plan B. We CAN create a user profile that allows NO charges. I have created such a profile, called BADADDRESS, on robin (the test server). When the user presents his/her card, a message appears on the screen that the user has too many charges, and an override is required to check out materials. While this message is misleading (and it cannot be changed....we asked), it does serve the purpose of stopping the checkout session; at that

point, the circulation staff member can investigate the user record and determine, via the notes or comments field, what action needs to be taken to correct the record, can perform the changes, and change the profile back to ADULT, JUV, or whatever is appropriate.

Subcommittee recommendation: The subcommittees felt that this, while not ideal, is a good, workable solution, and they unanimously voted to recommend this procedure.

The Executive Committee voted to create a new user profile (possibly named SEENOTES) which is allowed zero checkouts; this profile will be assigned to users who need special attention (such as an updated address) before being allowed to check out items. This profile may be assigned by any library, and may be changed by any library once the problem is resolved.

4. Age for ADULT Card Status (tabled from last meeting pending legal opinion)

“A person under the age of 18 would not be able to contract so you would have no recourse for late fees or if the materials were not returned. You would have no recourse if you give them a card. I do not recommend that you do so.”

BOR Legal Counsel

The Executive Committee voted to leave the age for an Adult PINES card at 18 or older, after receiving a legal opinion from BOR indicating that persons under 18 may not legally be held responsible for fines.

5. Outsourcing cataloging

A. Currently PINES prohibits member libraries from outsourcing original cataloging. One library has requested that the policy be changed so that they can contract original cataloging with one of their vendors.

Subcommittee recommendation: The cataloging subcommittee met to discuss this important issue, and after extensive discussion, concluded that they did not have sufficient information to advise the Executive committee on a policy change for original cataloging outsourcing. The nature of original cataloging within the PINES system is not fully known. The subcommittee decided to say “no” while collecting the necessary information to make a recommendation. It was decided that we should survey member libraries to determine the nature of the problem. A survey is being developed on the size of uncataloged backlogs in libraries, the nature of those backlogs (what formats, whether they were genealogical, local history, gift or small press items) and if the library would be interested in outsourcing them. This survey will go out to libraries (directors and cat-1s) no later than the end of May.

The Executive Committee agreed with a cataloging subcommittee recommendation to maintain the current cataloging outsourcing rules concerning original cataloging by vendors. At this time, vendors may not create original records in PINES. Once

an upcoming Cataloging Survey of all PINES libraries is completed, they will reconsider this issue.

B. *Proposal to revise section 8 of the “CAT1 Authorization as an Outsourcing Option for PINES Member Library Systems”* [Changes appear in italics.]

Old: Each vendor must have a library-system-specific ID and passcode for PINES and/or a library-system-specific OCLC authorization. These will be generated by PINES administrative staff upon request of the contracting library system, and after approval (for adherence to PINES policies and procedures) of vendor cataloging profiles by the PINES Cataloging Coordinator. The contracting library system is responsible for providing this information to the appropriate vendor(s), and agrees not to provide this information to any party other than the vendor for which it was created.

New: Amend the statement that appears above, as follows:

To initially log into PINES each vendor must have a library-system specific ID and passcode for PINES and/or a library-system-specific OCLC authorization. These will be generated by PINES administrative staff upon request of the contracting library system, and after approval (for adherence to PINES policies and procedures) of vendor cataloging profiles by the PINES Cataloging Coordinator. The contracting library system is responsible for transmitting this information to the appropriate vendor(s), and agrees not to provide this information to any party other than the vendor for which it was created.

Additionally, the first time that a particular vendor is engaged by a PINES member to access the OCLC database on their behalf, a vendor-specific link to the WorldCat will be established for them in SmartPort. If that vendor is later used by one or more additional PINES member systems, the vendor will still use the same SmartPort link into OCLC although additional library-system-specific ID's and passcodes will be assigned.

Rationale: Individual vendor-library associations will still be identifiable through assignment and use of the specific ID's and passcodes, but adding SmartPort links for each vendor/library system combination would not only create a tediously long list that member system catalogers as well as vendor staff would have to negotiate, but it would also invite errors because of the proliferation of link identifiers that would be easy to confuse and consequently to misselect.

APPROVED

6. Subcommittee Nominations

Cataloging:

Teddy Clark, MRLS

Gayla Brewer, CHRL
Sandra Broome, SHRL
Guojia Jin, OHOOP
Adrian Mixson, HALL; nominated for re-appointment

Circulation:

Judy Mays, SJRLS
Jeff Tomlinson, OHOOP
Dawn Dale, HALL

Reports:

Kathryn Youles, SJRLS
Teresa Pacheco, CRLS
Roberta Wilder, ECGR

APPROVED