Database Management Advisory Group Minutes

December 14, 2020

9:30 am

Zoom

1. **Call to order - 9:32 AM**
2. **Roll Call**

Alex Todd, Prospect Heights
Kate Hall, Northbrook
Mollie Brumbaugh, Zion-Benton
Arianne Carey, Niles-Maine
Linda Conn, Cary
Violet Jaffe, Palatine
Karen Kee, Glenview
Jeffrey Ray, Morton Grove
Jessica Thomson, Wilmette
Sarah Kaminski, Northbrook

Also present: D. Wischmeyer (CCS), R. Fischer (CCS), S. Scodius (NBK), J. King (NIK), M. Walters (EAK)

3. **Approval of Minutes from November 2020 Meeting**

Minutes approved by unanimous consent.

4. **Request for Additional Item Stat Codes**

D. Wischmeyer reviewed elements to consider when evaluating requests for new policies:

1. Is there overlap with existing policies?
2. Do these items need to be treated uniquely from existing collections?
3. How does this change affect the patron experience?
4. How does this change affect the staff experience?
5. Does this policy have longevity?
6. Will there be widespread adoption of the policy across the consortium?
7. Will libraries be required to use the new policy?
8. Will retro work need to be done? Will CCS staff or individual libraries be responsible for completing this work?

CCS received two new item statistical code requests: Realistic and Crime. The realistic code would be used to complement existing stat codes of historical mystery, fantasy, science fiction and allow a library to track genre information. The crime stat code was requested as many libraries are combining mystery and suspense collections into a single crime fiction collection.

There is no Polaris limit to the number of statistical codes CCS can have. CCS currently has 226 item statistical codes. The current values were pared down from over 2,000 equivalent values in Symphony during the migration to Polaris. CCS does not currently add branch-level stat codes; all values are shared system wide.

K. Hall noted that there was a lot of duplication in the existing stat codes and raised the question of how libraries use item statistical codes. Questions discussed included:

- Are libraries using stat codes to run statistical reports?
- Are libraries using stat codes differently?
- Which staff are using the data in these fields—selectors, catalogers, etc?

M. Walter said that Ela uses stat codes to run genre statistical reports since they do not have genre-specific shelf locations, as some other CCS libraries do. Staff also use this field to identify and pull materials for displays.

A. Carey noted that genre-fying youth collections is a trend. Item stat codes could be very helpful for libraries as that happens, since it would allow libraries to track statistics without changing shelf locations and call numbers. Item statistical codes are not currently seen as a tool for libraries to gather statistics. They are also not typically a field used in searching, though they could be.

A. Todd expressed concern over item stat codes becoming a limitless list and suggested that database management evaluate current stat codes, new stat code requests, and come up with a revised list.

The group also discussed whether it was important for libraries to use stat codes for comparative reporting. D. Wischmeyer noted that implementation of stat codes was not consistent across the system. To have accurate comparative reporting, CCS would need to have stricter guidelines for usage/implementation.

The group decided to table the discussion temporarily so that CCS can gather more information on how libraries use item statistical codes. Database Management will continue the discussion at their next meeting.

5. **Forthcoming Title Records**

D. Wischmeyer reviewed information gathered by CCS since the last meeting:

- **Other LLSAP practices:** SWAN, Pinnacle and RSA do not allow forthcoming title records; PrairieCAT has a similar practice, but titles are deleted after 45 days if not ordered.
- **Holds-placing practices across CCS:** CCS gathered data on holds placing patterns on a set of records created from 9/1/2019-12/31/2019. The data shows that most holds are placed after a title becomes available.
- **Sample bibliographic standards and workflows** drafted by CCS.

V. Jaffe provided additional information and answered questions about Palatine's current practices for forthcoming titles.

The group discussed several points, including:

- Forthcoming title records create an expectation that we will acquire a title imminently, when there is no guarantee a forthcoming title will be purchased.
- Not all libraries will have staff capacity to participate. This could create an expectation among patrons that non-participating libraries cannot fulfill. This would negatively impact non-participating libraries.
- During COVID, some patrons were confused over hold restrictions while intra-ccs lending was paused. Forthcoming title records might lead to similar issues. Patrons would not be able to place holds on these records if their library opted not to participate. D. Wischmeyer said that previous PowerPAC user testing showed that some patrons are confused over which materials owned by other CCS libraries are holdable to them. K. Kee noted that in a consortia environment, there will always be confusion when policies differ between libraries (for example, libraries that are fine free or not). This is something libraries are used to taking in stride.
- Not all patrons would use this service. Are we catering to a small group of patrons rather than the majority?

V. Jaffe moved and K. Kee seconded to allow the implementation of forthcoming title records in our system.

AYES: K.Kee, V. Jaffe

NAYS: A. Todd, K. Hall, J. Ray, L. Conn, M. Brumbaugh, J. Thomson, S. Kaminski, A. Carey

The motion did not pass.

A. Todd adjourned the meeting at 10:47 am.