

Database Management Advisory Group Minutes

November 9, 2020

9:30 am

Zoom

1. Call to order - 9:36 AM

2. Roll Call/Introductions

Alex Todd, Prospect Heights

Linda Conn, Cary

Kate Hall, Northbrook

Karen Kee, Glenview

Mollie Brumbaugh, Zion-Benton

Jessica Thomson, Wilmette

Arianne Carey, Niles-Maine

Sarah Kaminski, Northbrook

Also present: D. Wischmeyer (CCS), R. Fischer (CCS), M. Landers (CCS), Cyndi Rademacher, Niles

3. Forthcoming Title Records

CCS received a request from the Palatine Public Library District to allow libraries to add “forthcoming” title records to the database. Forthcoming title records are bibliographic records for future titles that are not yet available for purchase from a vendor.

D. Wischmeyer provided an overview of:

- What forthcoming titles are
- Palatine’s previous workflow as a standalone
- October SCRAP discussion
- PAS and Acquisitions survey results

The group discussed several different points, including:

- How far in advance of publication can libraries order titles? Popular books are often preordered 2-6 months in advance and many movies are available for pre-order from Midwest Tape when they are released in theatres.
- How would the shift to streaming format impact this? Shows released on streaming services such as Disney+ and Hulu are very popular and would likely queue up many requests, but those titles may never be released on DVD or Blu-ray.
- How would these records impact holds? If holds are limited to only libraries who are participating, patrons from other libraries could still see the records and attempt to place holds, but would be blocked. There is not currently a way to prevent forthcoming records from appearing in searches for non-participating libraries. There was also discussion of how libraries would manage transferring holds from forthcoming records to on order or final records.
- What are patron hold-placing practices? How many patrons want to place holds far in advance, and how many patrons prefer to place holds closer to the publication date?

- Would libraries be responsible for managing workflow or could this work be centrally managed by CCS? If we move forward with forthcoming titles, CCS would not manage the workflow centrally. Individual libraries would have to manage it at this time.
- What restrictions would we need to place on creation of forthcoming records? For example, if a patron requests *Winds of Winter* by George R.R. Martin, would we create a forthcoming record, even though we know it might not be released within the next two years?

The group decided that before coming to a decision, additional information was needed from Palatine:

1. How many forthcoming titles are typically add to the database per month?
2. Are there any titles/formats they will not add forthcoming records for?
3. Do you have any guidelines for what you will or won't add, or do you add everything a patron requests?
4. Roughly how many holds queue up on forthcoming records before the item can be ordered from a vendor?
5. How many forthcoming titles typically have to be deleted/cancelled because the item is never released?

In addition, the group would like sample procedures and bibliographic standards from CCS, and input from other consortia on whether they allow these titles. D. Wischmeyer will gather the requested information and send out a Doodle poll for a December meeting, making sure a Palatine staff member is able to attend.

4. Patrons with Blocks

CCS current policy states:

Every CCS member is required to refuse borrowing privileges to any patron who exceeds their home library's second-level fine threshold or whose account has a library assigned block.

In CCS' current Polaris settings, this policy is applied to both **new checkouts** and to **patron-initiated circulation** (PowerPAC renewals, telephony renewals, and autorenewal). The group discussed whether the current policy should encompass both new checkouts AND patron-initiated circulation (renewals), or whether patrons with blocks should be allowed to renew materials under the current policy.

After discussion, A. Todd moved that the current policy includes new checkouts and patron-initiated circulation/renewals. M. Brumbaugh seconded the motion. The group approved unanimously.

Patrons should continue to be blocked from both new checkouts and renewals per the policy when they have exceeded their second-level fine threshold. A library may increase their second-level fine threshold as needed.

A. Todd adjourned the meeting at 11:17 am.