

# Database Management Minutes

Tuesday, August 3, 2021

9:30 AM – 11:30 AM

## 1. Call to Order by Kate Hall (Northbrook), 9:31 AM

## 2. Roll Call/Introductions

Kate Hall, Northbrook (Chair)

Alex Todd, Prospect Heights

Joel Beverly, Fremont

Catherine Eilers, Highland Park

Jessica Thomson, Wilmette

Arianne Carey, Niles-Maine

Anastasia Rachmaciej, Park Ridge

Romi Pekarek Smith, Glenview

Belinda Husak, Algonquin

Sarah Kaminski, Northbrook

Richard Wozniczka, Niles-Maine

Calah Goehring, Huntley

Guests – Debra Wischmeyer (CCS), Tim Longo (Evanston), Ann Finstad (Glencoe), Sara Scodius (Northbrook), Linda Conn (Cary)

*Absent:* None

## 3. Minutes – Approved by unanimous consent

## 4. Database Management Overview

D. Wischmeyer introduced the role of Database Management in the CCS decision-making process and presented the elements to consider when making a recommendation on a standard policy or setting:

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

K. Hall reviewed group responsibilities and the different “hats” or perspectives that benefit group discussions (individual, library, and system-level). D. Wischmeyer provided a recap of FY20-21 projects worked on by the group. In this fiscal year, Database Management will continue to work on investigating library data needs and the implementation of the race/ethnicity patron attribute.

## 5. Race/ethnicity patron field – ACTION

D. Wischmeyer provided an overview of the work completed by CCS, the Evanston Public Library, and DEI consultant Biz Lindsay-Ryan since the May Database Management committee meeting. Following those discussions, CCS recommends the creation of an additional free text field to allow patrons to self-

report their race/ethnicity in their own words. This field would supplement the previously approved drop-down menu. Neither field would be required for any CCS library to use.

T. Longo spoke on how this additional field would reduce potential harm to patrons who do not identify with the values in the drop-down menu. Evanston would review the data entered in the free text field regularly and make corrections as needed. Evanston plans to implement the field in late September or early October. They will only ask Evanston patrons to voluntarily report race/ethnicity at the time of registration or renewal. They will not ask this question of any reciprocal borrower. Evanston does not have a paper application and staff verbally ask registration questions to patrons. They are working on a script and response matrix based on a [document](#) from the Oregon Health Authority. The script and document will be made available to all CCS libraries when completed.

D. Wischmeyer provided a demonstration of how the drop-down and free text fields would be displayed for Evanston patrons and non-Evanston patrons in Leap. The drop-down menu will appear in the attributes section of all patron accounts, but the only value for non-Evanston patrons will be “Not applicable.” The free text field will only display for Evanston patron accounts. The group asked whether patrons will be able to complete either field at the time of self-registration. Evanston does not plan to display this field to patrons who self-register.

A. Carey asked whether the new field will have predictive text or a character limit. D. Wischmeyer confirmed there is no predictive text option and that there is a 255 character limit. CCS will work with Evanston on reports to monitor the data being entered into the field and Evanston staff will clean up as needed.

**A. Rachmaciej moved and A. Todd seconded to add a new free text patron custom data field for race/ethnicity.**

AYES: R. Wozniczka, J. Thomson, S. Kaminski, C. Goehring, C. Eilers, R. Pekarek Smith, A. Carey, J. Beverly, A. Rachmaciej, B. Husak, A. Todd, K. Hall

NAYS: None

## **6. Material type change request –ACTION**

K. Hall introduced a request from the Glencoe Public Library to change the existing “cassette audiobook” material type to “other audiobook.” A. Finstad said that updating to an “other audiobook” material type would allow flexibility for all libraries to use and would accommodate future new audiobook formats.

The group agreed that the change would have low impact on technical services workflow and discussed how the change could impact searching for both patrons and staff. A. Carey noted that identifying the format of a title can be difficult in Leap, especially with econtent included in search results. C. Goehring asked whether Polaris indexing allows staff and patrons to search by the Yoto term. Currently, patrons and staff can keyword search for Yoto to bring up materials. A. Finstad noted that additional materials like Vox and Wonderbooks already exist in the catalog without their own individual material types, and in their experience, patrons have not had issues finding those in the catalog.

**A. Todd moved and A. Carey seconded to change the cassette audiobook material type to other audiobook.**

AYES: : R. Wozniczka, J. Thomson, S. Kaminski, C. Goehring, C. Eilers, R. Pekarek Smith, A. Carey, J. Beverly, A. Rachmaciej, B. Husak, A. Todd, K. Hall

NAYS: None

## **7. Holdability of New Materials – DISCUSSION**

D. Wischmeyer introduced the topic, which was previously brought to Database Management in February 2020. Currently, CCS member libraries have varying practices for who can place holds on their new materials. Some libraries limit new items to filling holds for local patrons only, while others allow new items to fill holds for patrons of all libraries. During user testing conducted in 2019, patrons said that it was difficult to know which items were available to fill holds when placing holds in the catalog.

D. Wischmeyer reviewed data on hold settings for items with a new material type. Libraries have varying practices and CCS does not have any system-wide standards. Approximately half of CCS libraries freely lend out new materials and the other half restrict sharing of new materials in some capacity. CCS would like to determine what additional data is needed to decide whether we should have system-wide settings.

D. Wischmeyer reviewed the Polaris item fields that determine whose holds an item can fill. Items can be:

- Holdable to anyone
- Holdable to local patrons only
- Holdable to local patrons for only x amount of days before becoming holdable to all patrons
- Holdable for pickup at a specific location

D. Wischmeyer explained how the Polaris prefer my patron setting works. A library's item will always trap first for that library's patrons, regardless of their place in the queue.

D. Wischmeyer provided an overview of PowerPAC functionality. In the catalog, patrons may choose to search titles owned by all CCS libraries. If they attempt to place a hold on a record that has no items that are holdable to them, they will be blocked from placing a hold. A patron will be able to place a hold on a title if at least one item attached to the record is holdable to them. There is no visual indication in the catalog that would tell the patron whether an available item owned by another library can fill their hold.

C. Eilers noted that their patrons do find item hold settings confusing, and that the library occasionally gets negative feedback from patrons from other libraries who don't understand why items aren't filling their holds. R. Pekarek Smith noted that hold limits may be more of a problem for popular fiction materials than non-fiction materials.

The group brought up several questions and considerations:

- How does the holds purchase ratio vary between libraries? Are holds ratio purchasing in line with each other? Do holds ratios vary by format?
- If we move forward with a system policy, would we need to adjust the 2-renewal requirement for intra-CCS items?
- What is the typical wait time for holds to be filled, particularly for popular titles?

- If we were to have a system policy, how would outlier collections be handled, such as summer reading or children's award winner books?
- How would staff workflow be impacted by any required changes, particularly in technical services?
- Do browsing collections (such as quick or hot picks) fill the need for items on the shelf? What are purchasing rates for hot picks vs holdable materials?
- How many checkouts come from browsing versus holds?
- How do libraries determine what is "new" to them? Publication date, popularity, or something else?
- Could the hold delay setting be a possible solution? C. Goehring shared Huntley's positive experiences using this setting.

CCS will work to gather data for the group to review at the next meeting.

**K. Hall adjourned the meeting at 11:39 am.**