

V-Cat Cooperative Circulation Meeting Report to V-Cat Council - February 2024

Last meeting: Thursday, December 28, 2023

Patron Records – standardized library card application and patron record recommendations update

Legal questions relating to library card application:

Zimmerman will meet with legal counsel and bring answers to requested items straight to V-Cat Council in February. Items include:

- Unlinking minors from adult parent/guardian
- How long to retain linking information
- Avoid giving title information to parent/guardian when minor is 16 or 17 years old – implications for circulation notices.
- If a parent/guardian is paying fine/fee, are libraries required to disclose the titles directly to parents?

Standardized library card applications—

- WVLS staff will use a checklist to ensure all parts of the form required are present.
- An updated MS Word form will be provided to libraries along with the editable MS Excel version.
- 2 libraries' have new forms that meet the new requirements.

Name Suffixes Placement in Sierra

- Sierra doesn't handle name suffixes well.
- Names are not present in search results if the suffix is placed after the last name—unless the suffix is included with the last name in the search. If you don't know about the suffix, you won't be able to find the person. Also, by placing the suffix after the last name, the library worker searching does not get anyone else with a suffix—Sr., III or so forth.
- Names are present in search results if Suffix is placed after middle name (Smith, John James Jr.)
- For searching purposes, it is better to put the suffix after the middle name: **Lastname, First name Middle name suffix.**
- It may be possible to find records to update with Create List for cleanup.

Extended checkout periods survey & Consider standards for the patron blocks table – limit number of items by item type survey - The survey accrued more information for irregular checkout than item type limits.

Senior outreach/Homebound checkouts

- It was recommended that libraries create some uniformity with a minimum/maximum number of weeks allowed. Current length of checkout varies: 5 weeks is the longest checkout, 4 weeks is more standard, 2 weeks the shortest.
- The committee considered extensions and renewals and the possibilities for loan rules to be automatically enforced in Sierra instead of being adjusted manually by staff
- It was recommended that it's up to your library to do what you wish with your local materials. For V-Cat libraries— respect what V-Cat determines is the maximum allowed.

Book club patron type

- Consider guidelines for how long an item is checked out for "club" card or patrons for book club purposes.
- The committee considered defining book club requests guidelines similar to the WISCAT ILL recommendation for book club titles.
- Consider adding a note with book club holds with Book Club and Date of Book club meeting
- Consider creating a shared Google doc of anticipated book club holds that could include planned book club dates to prevent competing clubs for libraries who wish to use and consult it.

Teacher's/Educators patron type—Discussion postponed.

Update on home pickup loan rules for high demand item types - Libraries expressed interest in limiting hold pickup on high demand items to the owning library. There is no way to keep patrons from changing the pick up location after the initial hold placement. A development request has been submitted to Innovative/Sierra. There is not an Aspen workaround.

The next meeting is scheduled for Friday, March 8 at 10 am.