ILS Ad Hoc Committee Meetings Summary

Charge: Explore policy adjustments to ILS features as listed by SCPL
Goals: Assess items from SCPL whitepaper, Determine ILS features that could be considered for possible implementation**,** Identify any JA policies that could be considered for review Items from JA reply to SCPL Withdrawal from JA whitepaper

1) Ability to implement autorenewal:

Committee recommends JAC reconsiders implementing this feature. Committee recommends policy adjustment on renewal limits and implementation system wide to prevent confusion.

2) Improved public catalog features including the ability to filter by items currently on the shelf, display of locations on the main search results page, display of how many holds are currently on a title and your place in line:

- Filter by currently on shelf: We already filter by what is on the shelf. The committee recommends bolding the "Find It" button to make it more obvious to patrons.

- Display of holds and place in line: The committee discussed that other systems show holds place in line in their PACs, but those systems require more reciprocal sharing than we do, and they use Vega in conjunction with the Polaris PAC. The Committee would like to see a redesign of the PAC and asks the JA Operations Committee to look into adding Vega and other enhancements.

3) Ability for us to manage and set appropriate ILS permissions for each library employee according to their job titles, functions and assigned responsibilities:

System trainers and JA staff are currently reevaluating the structure of permission groups. The committee agreed that this may work to address the issue. No committee recommendation.

4) **Ability to implement SCPL Board of Trustee policies relating to circulation, such as our fine block threshold**:

Committee recommends JAC develop a fine threshold guideline/policy to allow flexibility within an agreed upon range for each library. A threshold range of $20-$50 is recommended.

5) Ability to automate replacement cost bills via digital communications instead of printing and manually mailing them:

Committee recommends JAC reconsider implementing this feature. Committee noted that billing by text may cause confusion among patrons who have that selected. Committee recommends JA submit ticket to Polaris about the ability to choose which notification option bills are sent by (email). If impossible, Committee recommends a standard message suggestion be developed for text bills, that would direct patrons to contact their library.

6) Ability to discontinue collecting unnecessary personally identifiable information such as driver license numbers and reduce library liability and impact in the event of a cybersecurity breach (which in itself would be much less likely with the enhanced cybersecurity measures we'll implement under County IT):

Committee was unable to come to a conclusion on whether to continue to collect driver's license numbers or use a partial number or alternate unique identifier, as this is important in identifying/preventing duplicate patron accounts. The committee recommends further assessment by JAC.

7) Ability to do our own cataloging:

Committee recommends JAC make no changes to this item.

8) Ability to edit bib records:

Committee recommends JAC make no changes to this item.

9) Ability to run custom reports:

Committee recommends JAC look into options for providing custom reporting to senior staff. Committee noted that there are limitations to what information can be gathered from custom reports and some of this work is very specialized. Committee also worked to identify gaps in Polaris reports that could be added to the Polaris reports server for staff to utilize.

10) Ability to utilize functionality such as bulk record changes:

Bulk change permissions are currently given to a limited number of staff, and with proper training. The committee discussed the advantages (ability to take care of daily tasks without having to ask for help) and disadvantages (bulk change can be dangerous in terms of making a big mistake affecting many items) of offering this more broadly to library staff. No committee recommendation.