

## **McKINNEY PUBLIC LIBRARY SYSTEM ADVISORY BOARD**

**NOVEMBER 17, 2016**

The McKinney Public Library System Advisory Board met in regular session in the Dulaney Room of the Roy and Helen Hall Library, 101 East Hunt Street, McKinney, Texas on November 17, 2016 at 5:00 p.m.

Board members Present: Peter Samsury, Joann Pond, Amanda Hamilton, Joseph Closs, Lauren Smith-Carter, Cheryl Darveaux. Board members Absent: Coretta Lule.

Staff present: Library Director Spencer Smith, Librarian Supervisor Marci Chen, Librarian Supervisor Gary Landeck, and Library Administrative Assistant Alicia Quiroz.

The meeting was called to order at 5:00 p.m. after determining a quorum was present.

There was one guest present.

**16-1171** Minutes of the Library Advisory Board Meeting of October 20, 2016

Board members unanimously approved the motion by Board member Joseph Closs, seconded by Board member Amanda Hamilton, to approve the Minutes of the Library Advisory Board Meeting of October 20, 2016 as presented.

**16-1172** Chairman Samsury called for the Koha Report. Marci Chen presented her part of the Koha Report: One of our biggest challenges mostly involved getting our bibliographic records and item records ready for the migration. Staff spent some time on cleanup of our existing records and duplicate fields that weren't exporting into Koha. The interesting part was mapping our current collections to Koha. We had to figure out how Polaris worked and translate that with mega spreadsheets to how Koha set up their data. There was a challenge. We had to ask Polaris how codes worked and where to locate them. We also evaluated our current collection codes and item types to see if we could improve them and make them more user friendly and eliminate ones that seem to be too extraneous. We were

really thoughtful with how we were approaching our collections. Another task we did with acquisitions and ordering was giving our vendors a notification that the migration to Koha was coming. Brodart - one of our main book vendors, Midwest - our main DVD/Blu-Ray vendor, Recorded Books - our main audiobook vendor for both physical CD's and eAudiobooks, Bibliotheca - eBook platform, Self-check machines, RFID system, security gates, Envisionware - public computer management system, print release, mobile printing, document stations, Koha - open source integrated library system, Bywater Solutions - services and supports all facets of Koha ILS, OCLC - library cooperative integral to technical services and makes the International union catalog possible, and EZproxy - middleware provided by OCLC that makes remote ILL functions possible. We helped by preparing them before the migration so that the transition would go as smoothly as possible.

After the actual migration, the biggest challenge has been acquisitions. The acquisitions data, the orders that we had placed in Polaris, did not migrate over to Koha. Orders that we had placed in Polaris, had to be received in Polaris with the records in Koha so that they were available for people to check out, and then manually transfer the budget. The other thing is setting up EDI – electronic data interchange, between library system and book vendors. Our library system and book vendors – it automates a lot of the ordering process because the info is transmitted electronically. When we place the order and then when it is shipped to us, it is also transmitted electronically so it saves our staff a lot of steps. We are currently working on setting this process up to work correctly. We knew it would be a long process with testing, trying and tweaking of data to have it work correctly. Some other challenges were our hot off the press collection for items that can't be placed on hold or renewed. These behave differently and we were surprised and had to work with Bywater to quickly correct this. We also looked at how our records displayed on the

public's side of their computer. In Polaris it is all the same data, but it is displayed differently. Some of the things that were displayed in Polaris were harder to discern in Koha and vice versa. One of the things that we noticed was hard to determine was whether it was a DVD or Blu-Ray, etc. Another project that staff will undertake is adding information to the records to make it more identifiable so that we are more customer friendly. The staff reaction has been very positive for the most part. We knew going in that acquisitions was going to be a little challenging, but it's coming along and we are developing more. Those of us who catalog had some trepidation going in, but it has been surprisingly easier in Koha. It has two different cataloging views. Basic editor and advanced editor. Acquisitions staff have been very comprehensive with a great attitude and have shown awesome team work. Gary Landeck presented his part of the Koha Report: What I want to share with you all are the problems we are facing. Some of the major outstanding issues are our self-checkout machines. They have been working intermittently at best. We thought the issues were at first our machines and we worked with the vendor Bywater Solutions to help resolve the issue, but we ultimately discovered that the issue is within the City of McKinney's own network that is preventing certain signals from going through. Director Smith has been redirecting the issues with the Director of our IT department and their staff who have been working on correcting the issue. At this moment it has not been resolved and for the same reason our Inter Library Loan process has not been working, but only for our new users. There is a mechanism that makes our own catalog talk to the international union catalogs so that Patrons can request items outside of our system. We have received some complaints about this as well. However, our Inter Library Loan department has been taking those requests manually and putting them through. We're working as hard as we can to get these issues corrected. Some of our minor issues are related to how the Patrons are experiencing the

catalog itself. That includes how renewal notices are going out and what's included in the renewal notices. We've been doing a lot of tweaking with this. We're having a little bit of trouble with pulling holds for Patrons. Some items were showing in the catalog that should not have been. Patrons were able to make their own reading list in the old catalog, but unfortunately those did not migrate over. There have been a few complaints, but we are trying to extract this information from the old catalog and match it to the Patron. These were some of our major and minor issues. Going forward, we plan on putting together a team to continue to address these issues and continue to be responsive to how the Patrons experience the online catalog. We will receive major system updates about twice a year. This will not affect Patrons.

**16-1173** Chairman Samsury called for the Director's Report. Director Smith requested the Board's input on a new adult library card design that our Communications Department designed. Board members discussed modifications of the four options and Smith will present them to the Communications Department. Smith presented the October statistics to the Board. 143,874 items circulated with an 8% increase over October 2015, 47% increase over October 2014. There were 5,208 public computer sessions with a 4% increase over October 2015, 8% increase over October 2014. 731 new cards were issued with a 15% increase over October 2015. 290 hours were volunteered with a 54% increase over October 2015, 76% increase over October 2014. There were 38,725 library visits with a 5% increase over October 2015. 2000 reached through outreach with a 14% increase over October 2015.

Chairman Samsury called for Citizen Comments and there were none.

Chairman Samsury called for Board or Commissioner Comments: Chairman Samsury requested that vendor names be identified by who they are and what their purpose represents with Koha. Chairman Samsury has requested that December's Board meeting continue as planned if there is an agenda available.

Board members unanimously approved the motion by Board member Pond, seconded by Board member Closs, to adjourn. Chairman Samsury adjourned the meeting at 5:40 p.m.

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PETER SAMSURY  
Chairman