Sage Council Meeting Minutes

July 16, 2024

**Attendees**: Beth Ross (Sage), Dea Nowell (UCSLD), Jon Georg (Sage), Perry Stokes (Baker, Vice-chair), Maggie Pando (The Dalles), Kathy Street (OTLD), Marsha Richmond (Lake County), Carrie Bushman (Cook Memorial), Rachael Fox (Hood River)

**Request for agenda items**: no additional items given

**Approval of May minutes** – No quorum present. Vote to be handled via email.

**Committee Reports**

Cataloging Committee – The committee met on June 4. The discussion included the following: WorldShare interface for CatExpress, progress in the Niche Academy classes, a move regarding the cataloging calclulator [a resource mentioned on the AutoCat listserv] as well as a brief overview about how it is used, a reminder that we should not be using the trademark symbol in a title field, and a class spotlight for Niche Academy regarding Marc import.

Circulation Committee – No meeting was held.

**Council Chair and Vice Chair Nominations –** Perry asked if Dea would be willing to be chair this coming year. Dea agreed. Perry agreed to be Vice Chair. No vote was held due to lack of quorum. A request was made for any additional nominations to be sent in via email.

**Evergreen Tie-Ins –** Beth wanted the council to be aware of Aspen, which is a discovery layer for Evergreen that allows for increased personalization of the public interface as well as allowing APIs to be used to pull in electronic resources automatically. Beth made it clear that she was not advocating for the council to opt for it at this time, just to be aware of it and what it may be able to offer our patrons. She received a consortia level quote on 6/5/24 which was a one-time implementation cost of 11.5k which includes set-up and training for Beth and Jon. Annual cost is 10k, a 2.3k discount was applied as we were current clients. Total cost would be 19.2k-23.k total. Beth is going to see what personalization is available with the new version of Evergreen once that is installed on the test server. There was a question about if only a few libraries wanted to use Aspen and what costs would look like for that, an assumption was made that it would likely be cost prohibitive for just one or two libraries to use it, but that would have to be confirmed with Equinox.

**MessageBee –** Beth also got an estimate from MessageBee, which Beth and Jon do want the council to consider using in lieu of the internal Evergreen notification process. That process is dated, and many ISPs and Cellular providers are no longer routing the notifications because they are regarded as spam by their servers. We have used various workarounds including email aliases to bypass this issue, but it’s still an issue and we get regular complaints from patrons about them not receiving notifications. MessageBee allows for notifications to be customized to the individual libraries so that they are more patron friendly and also has a robust reporting system, which would help us know how and why notifications are failing to get to patrons. MessageBee also has the ability to send out a broadcast message to all patrons of a particular library which could be useful for staff.

Patrons would be able to opt out of MessageBee notifications, and the service works with us buying buckets of text messages and a flat rate for unlimited email notifications. The buckets do not expire. The annual estimate for email notifications is $5940 per year, and the text message annual cost is $675 plus the cost of the bucket of text messages which vary depending on how big of a bucket you buy [from 25k at $1250 to 300k at $8000]. They encouraged buying a larger bucket because it locks in the lower cost, but we have no idea currently how many text notifications the system sends out. Implementation costs are $995 for one channel plus $495 for an additional channel if we decided we needed another. In this case channel refers to email vs text, so if we wanted to implement just one of those it would be $995, if we wanted to implement both email and text it would be $995 + $495.

Perry asked that we look at LibraryElf which is a service that Baker County Library is using for patron notifications. Perry believes they pay about $500 per year for LibraryElf for their patrons.

**Scheduling Next Evergreen Software Upgrade** – The current Evergreen software upgrade timeline is expected to be September or October given the delays we’ve had with getting the test server upgraded through Emerald Data Networks.

**Hermiston closure & Age Hold Protection –** Kathy asked how the Hermiston Library closure for renovation would affect age hold protection and ILL’s, specifically in regard to YA materials.

Kathy also brought up the discussion that had occurred on the listserv in regard to age hold protection and patrons checking out items that were limited by branch by physically going to the branch in question when that is not their home library. The consensus appears to be that it is fine if a patron does so as long as those materials are returned to the owning library.

Six month age hold protection was also brought up, as it needs to be removed. Beth was going to run a report so that Beth and Jon could take care of getting those removed if any were still active. Marsha mentioned that Lake County libraries were going to be reducing the number of items that had age hold protection on them.

The age hold protection conversation then continued around which collections should be restricted and which should not, as well as some observations that some libraries have spent a significant portion of the budget to create specific collections that tend to disappear when circulated through ILL, which is why they want to retain those collections as branch only and encourage other libraries to grow their own versions of those collections.

**Hopeless holds –** Hopeless holds were also brought up as a way to try and determine patron issues as well as a possible way to help libraries determine future purchases.

**Meeting adjourned at 10:51 am Pacific Time.**