

## **Access Managers' II & III Meeting Minutes**

**Meeting Date / Time:** Tuesday, August 21, 2018 – 1:00 pm

**Meeting Location:** Belle Isle Library

**Attendees:** Jennifer Adkisson, Tricia Andrews, Meghan Attalla, Zachary Branstetter, Marc Coursey, LaVetta Dent, Donna Durbin, Kiley Ingram, Chris Kennedy, Eric King, Josh Lewis, Karen Litteral, Brittany Mays, Jill McFall, Debbie McPherson, Michelle Merriman, Cindy Revels-Nigg, Kim Rickey, Risa Sargent, Kevin Sendall, Cameron Smith, Vanessa Spaeth, Janeal Walker, Glenn Webb, Bridget Williams

**Outcomes:** To discuss topics/tasks related to Access staff to ensure that staff and members have a consistent experience across the system.

### **FYI:**

#### **Expired Holds – Janeal**

Recommendations for handling expired holds were posted on the intranet. Feedback was collected. A suggestion to add a note in habitual customers' accounts was incorporated into the document. The group discussed when the process should be implemented.

**Action Item:** After discussion, the group decided that the new expired holds process will be implemented by Monday, September 10, 2018.

#### **Handling Damaged/Missing Materials – Meghan**

The new process for handling damaged/missing materials was implemented on August 1, 2018. Damaged and missing items should be processed at the returning library as it is helpful for locating customers.

#### **Action Items:**

- If you receive damaged materials that were routed back to the owning location, please contact the AM at the sending location to let them know what item was sent so that they can work with staff at their location.
- Items with missing pieces should be routed to Greg via interoffice mail instead of through delivery to ensure they go to Greg and not to DN library.

#### **Shelving Order – Kiley**

The shelving order work group is coordinating a meeting with cataloging staff to discuss standard recommendations, local specifications, and items that fall outside of the scope of the shelving order. Kiley requested assistance in building a shelving order guide based on the work of the committee.

**Action Item:** Brittany (SO) and Kiley (ED) will develop a draft of the guide to share with the group at a future meeting.

### **Discussion:**

#### **Quarterly Performance Discussion:**

The group discussed how quarterly performance discussions are going. The discussion was focused on identifying concerns, positive outcomes, questions, patterns in behavior, and common phrases used when writing comments.

#### **Status/Location Codes – Meghan**

The work group gathered feedback about the status/location code proposal, with the goal of meeting everyone's needs. Some location codes did not work for every library. The group discussed collection locations that may vary from library to library due to space, location, audience, and status, including YNF and YAS/Sequoyah items. The group agreed that the location of these materials should be decided at a local level.

The group also discussed keeping the 30-day time limit set for the BKR/display status codes. BKR/display codes are temporary codes. On rare occasions, there may be instances that an item may need to remain in this status for more than 30 days. If this is the case, the status may be refreshed for an additional 30 days. A limit may be set for refreshing the BKR/display status codes.

**Action Item:** Risa will update the document to reflect decisions made via the poll and at the meeting. The document will be posted to the intranet for feedback and will be finalized at the September meeting.

#### **ASAP Holds – Brittany**

The group discussed who should have permissions activated to use the ASAP option in Carl X. This option allows staff to place customers at the top of the hold queue at the time the hold is placed. This is particularly useful when staff need to reroute a hold to another library that has already arrived at the hold shelf. AS2s and above will have permission to use the ASAP option.

**Action Item:** Risa will reach out to the library management team and EPS to find out if and/or which Engagement staff will have permissions activated.

#### **Inventory Schedule and Process – Janeal**

A new work group was established in order to work with Collection Development to reevaluate the CollectionHQ and Inventory schedule. A second workgroup to evaluate Inventory and Shelf Reading best practices will begin when the first ends. Janeal asked for volunteers to work on the two groups. Workgroup 1 will include Janeal (now NW, will be CD), Michelle (NW), and Tricia (CL). Workgroup 2 will include Bridget (DN), Vanessa (BI), Kevin (MC), and Josh (CL).

**Tracking Access Changes - Meghan**

The group was asked to review drafts of the FY 18 and 19 Access changes documents and provide feedback. The Access Changes document will be used as a place to keep access information, outline problems and solutions, and identify implementation dates. Meghan asked for volunteers to assist in the review of the documents. Jill (VI) volunteered.

**Damaged/Missing Pieces – Risa**

Risa asked for volunteers to help rewrite the damaged materials and missing pieces processes in the Access Manual for clarity. Jennifer (RE) and Kevin (MC) volunteered.

**Ranking Access Tasks – Jennifer and Morgan**

Jennifer and Morgan from Planning and Assessment are gathering information about access tasks to develop a more comprehensive understanding of the access workload. The group participated in a ranking exercise to help identify the average length of time it takes to perform a task and how many activities occur at each library.