

**OWLSnet Patron Registration Committee Meeting  
Outagamie Waupaca Library System  
March 5, 2008**

**Present: Brian Kopetsky, APL; Kathy Mitchell, CPL; Carolyn Habeck, HPL; Barbara Wentzel, LIT; Laura Jandacek, Rick Krumwiede, Gerri Moeller, OWLS; Mikki Moesch, SHA**

1. Call to order

The meeting came to order at 9:30am in the APL board room.

2. Other Business

Right before the meeting, Gerri was made aware that two other people had expressed interest in being members of the committee, and were under the impression that they had volunteered. The committee recommended that invitations be extended to these individuals, and that future meetings be published in advance, with an open invitation to anyone interested in attending.

3. Mission of the Patron Registration Committee

AAC has charged the committee with developing standard procedures for obtaining and entering patron data in new and modified patron records. Specifically, the group is to develop two sets of standards, minimum standards and best practices standards, and make a recommendation to AAC as to which level of standards AAC should adopt.

Because this is an important issue, Rick discussed it with the OWLS board at last month's meeting. According to Rick, board members understand the importance of accurate and reliable patron information and support our efforts in improving our standards. The Board also suggested we look to other consortia, compile data of our current consortium practices and strive to standardize our practices within the consortium.

Rick recommended that as we look at developing patron registration procedures, we focus on and assess the needs and issues brought forth during our meetings. We should view the entire process with a "clean slate" perspective rather than being trapped in old practices and procedures.

4. Goals of the Patron Registration Committee

The committee discussed and modified a list of goals that Gerri put together, based on conversations with OWLSnet librarians.

Make sure that the patron data is correct and complete so we:

- Don't create duplicate patron records
- Can locate the patron in order to contact them and/or be able to retrieve materials from them
- Assign location codes correctly – and make sure our statistical data is correct
- Can all have confidence that all patron data is correct, since all patrons have access to all materials
- Can make sure that the patron checking out is using their own card

Make sure that patrons don't *intentionally* get duplicate cards.

- Make sure they are who they say they are

Make it easy to get cards

- Don't create unnecessary hoops

Make it easy for schoolchildren to get cards, yet make sure:

- The kids are who they say they are
- The parents are who they say they are
- The parents are responsible for the materials their kids check out

Enter our data in a consistent manner, according to the patron registration procedures in the OWLSnet manual, to:

- Make sure data conforms to postal regulations
- Prevent duplicate records
- Make it possible for data to be easily extracted, in the event of a data migration
- Make sure all libraries can trust the patron data, regardless of where it was entered

#### 5. Current Practices Discussion

- Mikki suggested we gather and compile data regarding our member library practices. Committee members agreed. OWLS staff members will set up a list-serve for committee members to begin to submit questions for a current practices survey.
- The OWLSnet manual contains standard procedures for entering data, however not all libraries consistently follow these procedures. We still see a lot of data not entered according to the procedures.
- Barbara suggested that lack of conformance to procedures may be an issue of staff training and staff not fully understanding the policy driving these practices.
- OWLS staff will work on creating a formal procedure outlining these instructions. This may make it easier to find and easier for directors to train staff.
- The perception and importance (weight) of owning a library card were discussed in regards to public perception. Staff training and additional tools are available to answer and reinforce why we require what we do when issuing a library card.
- Rick suggested we have a legal review of any recommended practices.
- An online registration form (already used by some libraries) could make the patron registration process easier for staff – as well as seem more formal.
- Gerri brought up the soon to be implemented PC Management program and the impact it may have on our decisions regarding new registration procedures.
- Brian reminded us the focus of this committee is on developing new standards and not be caught up in the current practices in place

#### 6. Here are some of the issues OWLSnet libraries are currently dealing with:

- How do we uniquely identify a person?
- What is an acceptable ID? What provides the identity proof we need without violating the patron's privacy?
- What about using the Social Security numbers or cards as proof of ID –we could record just the last four digits.

- Millennium offers the ability to record the patron's photo in their patron record. Milwaukee County is currently using this. Should we consider this?
- Authenticating parent's signatures – should we require photo ID for parents?
- Parents using kid's cards and vice versa
- Should we retain patron registration forms? If so, for how long?
- Can step parents and those that are not legal guardians sign for a child's card?
- What are our homeless/community card procedures? ALA has some recommendations on this.
- Are we following our own procedures in terms of employee cards? We need to set an example and follow our own policies.
- Use of probationary cards – Appleton does a version of this, only allowing 4 items at first.
- Waupaca has already successfully implemented a shorter expiration date (Indianhead has too) and Appleton is considering this.
- Current self check machines do not require a PIN number and allow a patron to use anyone's library card to check out.
- Library cards can be used to get other documentation – does that mean we have additional responsibility to ensure this data is correct?
- What does having a card mean? What are the rights and responsibilities? Should we be doing something different to ensure that the card is taken seriously? Maybe instead of easy, we should be make it "reasonable" to get a library card.
- There is a tension between making it "easy" to get a card and our impression that having the card is a responsibility. The lines at the desk can make us focus on the "easy" part.
- Could online registration help?
- What about digital signatures?

7. What's next?

- OWLS will create a web page on OWLSnet for the Patron Registration Committee.
- OWLS will set up a listserv for committee members.
- Committee members will use the listserv to submit suggestions for survey questions about current practices by OWLSnet member libraries.
- Committee members will use the listserv to communicate other issues related to patron registration.
- OWLS will work on a formal procedure for patron registration based on current procedures in the OWLSnet manual.

8. The next meeting was set for March 24<sup>th</sup> in the OWLS meeting room at 9:30 AM. (NOTE: that meeting has since been postponed.)

9. The meeting was adjourned at 11:40 AM.