

Notice

Milwaukee County
Federated Library System
Library Directors Advisory Council

Regular Meeting
Thursday, February 3rd, 2022
10:00 AM – 12:00 PM

This meeting will be held:

Online at
Meeting URL: [CLICK HERE](#)
Meeting ID: 898 2748 8344
Passcode: yUdJ193t
Telephone Passcode: 44077315

Agenda

The LDAC reserves the right to take action on any of the items listed below.

1. Call to order
2. Additional agenda items/adoption of agenda
3. Approval of minutes for the January 6th, 2022 LDAC meeting

Action

Action

[Attachment A](#)

Topics Requiring Action or Discussion

4. Member library updates related to COVID-19
 - a. [Please update MCFLS Member Libraries Current Status Document](#)
5. Inclusive Services: recommendation to endorse DPI statement on inclusive services

[Attachment B](#)

Technology.

6. Interest in investigating a system-wide quote for copier services
7. Implementation of MFA (Multifactor Authentication) on MCFLS Outlook Email Accounts
8. Patron Point status update. Question regarding outreach to juvenile patrons.

[Attachment C](#)

Informational.

9. Library Legislative Day is February 8th. Attached Infographic and Talking Points
10. InfoPass: overview of draft operating guidelines and workflow.
11. 2021 annual report update. Annual reports are due to the system by March 1st, 2022.

[Attachment D](#)

[Attachment E](#)

Additional Business

Member Library Updates

Sub-committee agendas and minutes

Circulation Services—Agenda and minutes available at <https://mcfls.libguides.com/circulation/meetings>

Youth Services—Agenda and minutes available at <https://mcfls.libguides.com/youth/meetings>

Young Adult Services—Agenda and minutes available at <https://mcfls.libguides.com/youth/yameetings>

Adult and Reference Services—Agenda and minutes available at <https://mcfls.libguides.com/adult/meetings>

Next Meeting

Scheduled for Thursday, March 3rd at 10 am via Zoom.

Milwaukee County Federated Library System
Library Directors Advisory Council
Regular Monthly Meeting held Thursday, January 6, 2022
Zoom Meeting Software

Present: Amy Krahn, Chair, St. Francis Public Library
Dana Andersen-Kopczyk, Brown Deer Public Library
Rachel Collins, Shorewood Public Library
Tony Frausto, Milwaukee Public Library
Michael Koszalka, West Allis Public Library
Jill Lininger, Oak Creek Public Library
Jennifer Loeffel, Franklin Public Library
Pete Loeffel, Wauwatosa Public Library
Tristan Marshall, South Milwaukee Public Library
Matthew Murphy, Milwaukee Public Library
Sheila O'Brien, Greenfield Public Library
Nyama Reed, Whitefish Bay Public Library
Martha Riel, Hales Corners Public Library
Alice Sedgewick, North Shore Library
Brian Van Klooster, Greendale Public Library

Excused: Rebecca Roepke, Cudahy Family Library

MCFLS Staff: Steve Hesel, Director
Eric Henry, Network Administrator/PC Support Specialist
Judy Kaniasty, Business Manager
Deb Marett, Public Information Coordinator
Jen Schmidt, Library Systems Administrator

Others: Karli Pederson, Acqs/Serials Mgr, Milwaukee Public Library
Melody Schuetz, Adult Services, North Shore Library

Call to Order. Chair Krahn called the regularly scheduled monthly meeting of the Milwaukee County Federated Library System Board of Trustees Library Directors Advisory Council to order at 10:00 a.m.

Additional Agenda Items/Adoption of Agenda. Chair Krahn inquired whether there were any additions to the agenda and these were suggested:

- Extend Library Card Expiration Dates/Steve Hesel
- Change Time of TBS Sessions/Steve Hesel

Jill Lininger moved and Sheila O'Brien seconded a motion to modify the agenda to add the suggested topics which will be discussed during the COVID update discussion. Unanimously approved.

Approval of Minutes for the December 2, 2021 LDAC Meeting. Chair Krahn referred to the minutes of the December 2, 2021 meeting which are shown as Attachment A of the agenda packet. There being no corrections to note, Rachel Collins moved and Tony Frausto seconded a motion to approve the minutes as presented. Unanimously approved; Sheila O'Brien abstained.

TOPICS REQUIRING ACTION OR DISCUSSION.

Member Library Updates Related to COVID-19. Chair Krahn reminded all to please update MCFLS Member Libraries Current Status Document. Sheila O'Brien reported that due to staff illness, Greenfield has gone back to curbside services and has moved to virtual programming; a good number of staff are wearing masks and the City's human resources department is handling staff contact tracing. Nyama Reed reported that Whitefish Bay has a patron mask mandate beginning on Monday for patrons and moving to virtual programming. Rachel Collins reported that Shorewood is considering service reductions and is moving to virtual programming. Chair Krahn reported that St. Francis has paused their reopening plans. Staff are unified with being vaccinated and wearing masks and reporting contact with COVID. Tony Frausto reported that Milwaukee will not be increasing hours of operation until at least March. Brian Van Klooster reported that Greendale is not changing any services or hours of operation; more staff are wearing masks. Tristan Marshall reported that South Milwaukee has been very slow to begin programming and require staff to wear masks and recommends patrons do so. Jennifer Loeffel reported that Franklin will be pausing children's programming in January. Melody Schuetz reported that North Shore is closed due to staff illness and hoping to open on Monday with curbside and phone reference; staff are wearing masks with a strong recommendation that patrons do too.

Extend Library Card Expiration Dates. Steve Hesel asked whether libraries would like to have library card expiration dates extended due to the COVID surge? After some discussion it was suggested that those libraries that desire extensions should contact/work with Jen Schmidt directly.

Change Time Of TBS Sessions. Steve Hesel noted that the current setting is at 2 hours with an opportunity to add one additional hour and he wonders whether there is any desire to make any change due to the COVID surge? Discussion ensued and it was decided that individual libraries can make changes if desired but that no system-wide change would be made at this time.

Proposal for Longer Term Card Expiration for Digital Users. Steve Hesel noted that the digital cards are only good for three months and help patrons gain access to digital offerings at member libraries. Since MCFLS marketing efforts are promoting Gale courses, in particular, it is wondered whether the digital cards could have a longer life so patrons can sign up and finish courses without having to upgrade those digital cards? MCFLS suggests they be good for one year in which time MCFLS will reach out to those users via email to nurture a relationship and educate the importance of libraries. The question arose whether those digital cards are counted in the DPI Annual Report statistics as registered borrowers and they are not. There is also some concern that those digital users are incurring costs for member libraries that use products that are paid for based on per use but it is felt that may not be too much money. After discussion, Rachel Collins moved and Tony Frausto seconded a motion to change the life of the digital cards from 3 months to 12 months as soon as administratively possible for the above mentioned reasons. Motion passed with one no vote=Sheila O'Brien.

State Aid Survey Responses from Systems – MCFLS Response. Steve Hesel shared his proposed changes to the State Aid Survey and welcomed discussion and feedback since the State is at the data collection stage. This is an opportunity to review and take into consideration for possible changes to be considered. The consultant is looking at numbers and is seeking more context; then a proposal is expected to be forwarded to DPI during first quarter 2022 with a summit to be held with the stakeholders with time for legislative changes if needed. Steve expressed his understanding that the current level of funding should be retained but any future increases are not guaranteed. A key component expressed during the PLSR discussions was to keep all system funding in place moving

forward and he will be watching that. Responses are due tomorrow. Rachel Collins thanked Steve Hesper for sharing the MCFLS climate with the State and noting that the reciprocal borrowing money is used by many as operational funds is appreciated. Steve Hesper added that if any member library has done a patron survey recently that he would appreciate knowing that.

TECHNOLOGY

Kanopy Contract and Settings. Steve Hesper referred to the template for Kanopy settings which is shown as Attachment B of the agenda packet and an optional member library purchased product. It was noted that test cards are community specific and can be generated by contacting Jen Schmidt.

New Terms for Microsoft Licensing Through TechSoup. Steve Hesper reviewed information from TechSoup, which is shown as Attachment C of the agenda packet pertaining to changes being made on how public libraries access Microsoft Windows and Office software products. TechSoup pricing for on-site licensing will increase and their offering is moving to online versions which won't work for public computers. MCFLS is looking at educational licenses. They are twice as expensive but they can be purchased for both public and staff pcs which is still far cheaper than the retail cost. An alternative purchasing option is the state contract for licensing through CDW-G which many local governmental agencies may already have accounts with or member libraries can get through MCFLS. Eric Henry will compare both costs when asked by a member library to quote any Microsoft software products. Steve Hesper noted he will send out an email shortly containing the CDW-G contract information to the LDAC.

CountyCat Mobile App Update. Jen Schmidt reviewed Attachment D of the agenda packet which announces that MCFLS will be moving to a different and improved mobile app. Jen noted that she and Steve Hesper have been pretty disappointed with Communico for some time and while we were led to believe moving to Version 2 would be a few months after we signed on, they are still on Version 1 of their software. Steve Hesper did take a hardline with Communico in December and the company actually came out with two updates which is an improvement over what patrons and staff have been experiencing and she thanks libraries for their patience. Research and demos will be held during the first quarter of 2022 with an anticipated move in second quarter 2022 since the contract with Communico ends at the end of July. Jen Schmidt said she would send out a link to the Winnefox Library System mobile app so the LDAC can check it out.

INFORMATIONAL

New Baker & Taylor Contract with MPL. Steve Hesper asked Karli Pederson to speak about the new MPL Baker & Taylor Contract and she did review Attachment E of the agenda packet noting the terms extended to suburban libraries which are shown in the Attachment. It was clarified that suburban libraries have already been paying for full text reviews so that is no something new. It was noted that suburban libraries appreciate being included in this through MPL's relationship with Baker & Taylor.

Proposed Outreach Kits for use by Member Libraries. Steve Hesper reported that MCFLS is seeking input for what to include in two kits that will be put together for member libraries and MCFLS to use at events promoting libraries at local events. So far ideas are two chairs, a folding table, a table cloth, flyer stands and promotional materials for materials all member libraries offer. A canopy tent was suggested as well as a game-type feature, cart to move items. A few LDAC members indicated they have kits already for this purpose.

2021 Annual Report Update. Steve Hesel reported that DPI is a bit behind schedule so the fill-in document isn't ready yet but MCFLS is collecting data to be filled in when that form is released. The form for public libraries will open on January 24 and the deadline remains March 1. Local library boards can give permission for their presidents to sign the form prior to formal approval if necessary to meet the deadline. WILS has been hired on by DPI to manage the annual report process this year. There are no significant reporting changes. Steve Hesel plans to send out all local instructions and figures on January 21. Nyama Reed questioned whether the 2020 numbers are yet available and Steve Hesel will check on that.

ADDITIONAL BUSINESS. (None)

MEMBER LIBRARY UPDATES.

Hales Corners – Martha Riel reported that the final interviews for the Director replacement will be held soon and it is hoped that a replacement will begin by the end of the month.

Brown Deer – Dana Andersen-Kopczyk reported that Brown Deer's Drive-in is open on Sundays from 10-2.

St. Francis – Amy Krahn reported there is a part-time circulation staff vacancy.

North Shore - Alice Sedgewick reported she started as Interim Director at North Shore on Monday.

Library Legislative Day – Pete Loeffel reminded the LDAC that Library Legislative Day is February 8 and registration is open; no virtual event plans are being considered.

ARPA Grant Funding – Steve Hesel reported that access to the funding portal email just was received so once all users have set up accounts then the ability to seek reimbursement will be allowed. Steve asked that libraries not spend funds until he receives the word from DPI that funds are approved. The timeline is 7/1/21-6/30/22 for expenditures that can be reimbursed.

SUB-COMMITTEE AGENDAS AND MINUTES. Links are provided on the agenda to access agendas and minutes of the Circulation Services, Youth Services, Young Adult Services and Adult & Reference Services Committees.

NEXT MEETING. Scheduled for Thursday, February 3, 2021 beginning at 10 a.m. via Zoom meeting software.

ADJOURNMENT. With no further business to be addressed, Rachel Collins moved and Pete Loeffel seconded a motion to adjourn the meeting at 11:56 a.m. Unanimously approved.



Carolyn Stanford Taylor, State Superintendent

The Inclusive Services Statement from the Division of Libraries and Technology August 1, 2019

Wisconsin public libraries are places where everyone should be safe, welcomed, and respected in experiences including, but not limited to:

- Arrival at the building (transportation, physical accessibility, signage, hours of service, greetings by library staff)
- Intersections with library policies (getting a library card, using a computer, paying a fine)
- Perusal, use, and request of library materials (Wi-Fi access, collection diversity, individual privacy)
- Participation in library-sponsored or library-located events (marketing of events, time and location, transportation, registration, room set-up, novice-friendly vs. designed for frequent users)
- Interactions with library staff (body language, tone, diversity of library staff, proactive/reactive engagement)
- Passive and virtual interactions through library signage, webpages, displays, and marketing (readability, tone, diversity, accommodations).

The Division of Libraries and Technology interprets Wis. Stat. sec. 43.24(2)(k) "*Promotion and facilitation of library service to users with special needs*" to encompass **inclusive services**. Inclusive library services are holistic, spanning library policies, collections, space, and services. Inclusive services reflect equity and accessibility for all members of the community. Diverse communities are strengthened by libraries that intentionally develop and deliver services to individuals or groups for whom accessing and using the library is difficult, limited, or minimized.

The library director and board of trustees should provide awareness and leadership concerning the concept and implementation of inclusive services to library staff and stakeholders. Regional library systems should support member libraries in matters of compliance, and communicate such efforts through annual system plans and reports. The state library agency will provide consulting and collaborate with libraries and systems regarding inclusive services. Wisconsin public libraries serve everyone, and it is the duty of everyone in the service of Wisconsin public libraries to foster inclusivity.

The practice of providing inclusive services requires continuous reflection and ongoing dialog with and between library administration, staff, and members of the community, with particular emphasis on including the voices of those who are underserved, underrepresented, and underrecognized within the community. Efforts should respond to the assets and needs of non-library users and users alike. Attention to actual, versus perceived, assets and needs is paramount; i.e., a barrier perceived by library staff may or may not be an actual barrier experienced by the user.

On a concrete level, inclusive services should be visibly incorporated into all library services. The concept that libraries are for everyone should be evident through every point of access or interaction with the library. A person's race, ethnicity, age, citizenship, literacy level, ability, family structure, income level, health status, gender identity, sexuality, style of dress, familiarity with public libraries - or any other dimension of identity - should neither negatively influence nor interfere with access to library services.

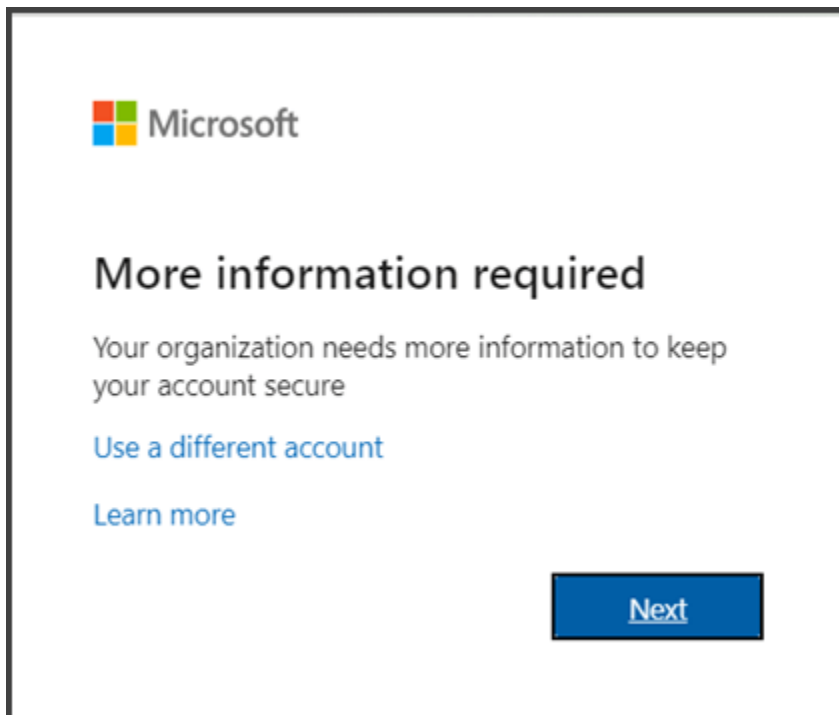
When libraries honor the full diversity of their communities, communities thrive. Fundamentally, inclusive library services should be developed locally with and for all community members. Wisconsin public library system and state library staff should facilitate coordinated regional and statewide inclusive services training and consulting. Our common goal is to improve life and learning opportunities for all Wisconsin residents.

Set up your Microsoft 365 sign-in for multi-factor authentication

Once your admin [enables](#) your organization, and your account, for multi-factor authentication (MFA) you have to set up your user account to use it. This should only take a minute or so.

By setting up MFA, you add an extra layer of security to your Microsoft 365 account sign-in. For example, you first enter your password and, when prompted, you also type a dynamically generated verification code provided by an authenticator app or sent to your phone.

1. Sign in to Microsoft 365 with your work or school account with your password like you normally do. After you choose Sign in, you'll be prompted for more information.



2. Choose Next.
3. The default authentication method is to use the free Microsoft Authenticator app. If you have it installed on your mobile device, select Next and follow the prompts to add this account. If you don't have it installed there is a link provided to download it.

If you would rather use SMS messages sent to your phone instead, select I want to set up a different method. Microsoft 365 will ask for your mobile number, then send you an SMS message containing a 6-digit code to verify your device.

Tip: For a faster, and more secure, experience we recommend using an

authenticator app rather than SMS verification.

4. Once you complete the instructions to specify your additional verification method, the next time you sign in to Microsoft 365, you'll be prompted to provide the additional verification information or action, such as typing the verification code provided by your authenticator app or sent to you by text message.

Note: Generally you'll only need the additional verification method the first time you sign into a new app or device, or after you've changed your password. You probably won't be asked for the additional verification code on a daily basis, unless your organization requires it.

If you have applications that don't support multi-factor verification, you must set up an app password. See [manage app passwords](#) for more information.

See also

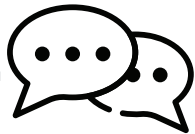
- [Sign in to Microsoft 365 with multi-factor authentication](#)
- [Fix common problems with multi-factor authentication](#)
- [Use Microsoft Authenticator with Microsoft 365](#)
- [Change how you get multi-factor authentication codes](#)
- [Admins: Set up multi-factor authentication for Microsoft 365 users](#)

Need more help?

15
LIBRARIES
SUPPORTED

Better Community Outreach

- Additional funding to support the system marketing plan and assist member libraries in connecting with patrons.
- Purchase of an integrated online patron registration product that enables ongoing relationship building with community residents.



Digital Learning Resources

\$70k
SAVINGS
TO MEMBERS

- Gale Courses and Udemy have hundreds of online classes which are free to our county residents.
- MCFLS now covers the entire cost of providing both of these course subscriptions for all member libraries.



Overall, member costs are being reduced from roughly \$1,000,000 in 2021 to \$865,000 in 2022 for a total reduction of \$135,000

Decrease in Member Library Costs

\$135k
COST REDUCTION
FOR MEMBERS



- Addition of a part-time PC support specialist for consultation with member libraries, research, and training. Services are charged at \$60/hr, a \$165/hr savings.
- Work with a network security consultant to advise on best practices related to safeguarding system and library networks.

Improved IT Support

\$165
PER HOUR
SAVINGS

Without the library ebook (Libby) service,
I would've gone crazy this
past year. Being able to
read books without having
to venture outside has
literally **saved my life.**

Stephanie from Oak Creek

**Thank you BROWN
DEER LIBRARY, I
have happy kids at
home because of
you and the books
they read...**

Dev from Brown Deer

**I USE THE MILWAUKEE
PUBLIC LIBRARY'S
INTERNET SYSTEM TO
ACQUIRE BOOKS ON
LINE, AND IT HAS BEEN
A LIFESAVER DURING
THE YEAR! MY THANKS
TO ALL INVOLVED
IN PROVIDING THIS
SERVICE.**

TIM FROM SHOREWOOD

I **love** our local library...I
was so happy when it
reopened. I have been
getting books regularly and
it has helped my stress and
my **mental health.**

Laura from Milwaukee

Thank you Milwaukee Public Library for adapting to keep us safe and
remaining open so we can feed our curiosity and wonder with books.
Danielle from Milwaukee

MCFLS Library Legislative Day Talking Points

These talking points are meant to be used with the infographic generated by MCFLS staff. Consider these to be starting points for expanding on how your library and community will benefit from additional state aid that was added for FY 2022 and 2023. The emphasis should be on gratitude and thanking legislators and their staff for including the increases in the current state budget.

HOW MCFLS AND MEMBER LIBRARIES PLAN ON INVESTING ADDITIONAL STATE AID FUNDING

BETTER COMMUNITY OUTREACH

The pandemic has illustrated the need to reach out to our communities and start the process of rebuilding relationships with our patrons and demonstrating how the services libraries provide can improve their lives. Many residents continue to use their library as they had before, but our new investments in marketing and outreach will improve our libraries' ability to keep them engaged and informed users.

DIGITAL LEARNING RESOURCES

With additional state aid, our library system can now pay entirely for learning resources such as Gale Courses and Udemy, which offer structured, online classes in both in-person and self-directed formats. This universal coverage allows us to promote the resources prominently in marketing campaigns while at the same time giving all residents of Milwaukee County access to thousands of online learning resources to improve their life and work prospects.

DECREASE IN MEMBER LIBRARY COSTS

Because of the increase in state aid the library system can absorb additional costs that were once the responsibility of member libraries and, by extension, municipalities. Overall, members will save a total of \$135,000 in 2022 alone and \$270,000 over the course of the budget cycle. The savings will assist member libraries at the time when they and their municipalities desperately need it.

IMPROVED IT SUPPORT

The additional state aid will also allow the library system to make needed improvements to our technology infrastructure and provide additional support to our member libraries. Part of the funding will be used to employ the services of a network security consultant that has already started work on safeguarding our wide area network. The system also plans on hiring a part-time PC Support specialist to assist our staff in meeting growing needs posed by our member libraries. MCFLS charges \$60/hour for support services, roughly \$165/hour below the market average for similar support, saving our members thousands of dollars each year.

InfoPass Operating Guidelines

Approved by InfoPass Steering Committee, 1/14/2022

Purpose

InfoPass is a resource sharing collaborative of over 50 libraries (public, academic, private, special, K-12) designed to broaden access to patrons in the greater Milwaukee area by providing the guidelines and infrastructure to allow patrons from one library to borrow materials from other participating libraries. It relies upon the contributions of these partners to sustain the project. These guidelines describe the expected partnership contribution of the participating organizations including the service provider/project manager.

Stakeholders

- K-12, university/college, public, and special libraries throughout southeastern Wisconsin are eligible to participate. InfoPass participants must participate as a lender in order to participate as a borrower.
- Milwaukee County Federated Library System (MCFLS) serves as the service provider/project manager and fiscal agent. MCFLS is an ex-officio member with no voting rights.
- Library patrons at participating libraries are the recipients of this resource sharing service.

Project manager role and responsibilities

MCFLS will serve as the InfoPass project manager and will involve participating organizations for input and decision-making needed to complete the deliverables laid out in this agreement. Additionally, MCFLS will serve as the fiscal agent, managing the InfoPass reserve account on behalf of the collaborative.

MCFLS will provide the following services to InfoPass:

- Onboard new participants.
- Provide an annual update to the InfoPass participants list and/or coordinate an annual meeting as warranted.
- Coordinate governance activities including populating the Steering committee, calling meetings of the Steering Committee, and any other workgroups or committees.
- Work with the Steering Committee to identify additional service opportunities as needed.
- Provide fiscal agency services including:
 - pay invoices as needed
 - monitor income and expenses
 - present budget updates to the Steering Committee and at the annual meeting

- Provide technical support and maintenance for the InfoPass referral and communication platform.
- Maintain an active participant directory that includes contact information and local policies.
- Undertake other projects as directed by the Steering Committee.

Participant roles and responsibilities

- Participate as an InfoPass lender in order to refer patrons to another InfoPass library for borrowing privileges.
- Follow the communication protocols when referring patrons to another InfoPass library.
- Adhere to the InfoPass policies as outlined in [Appendix A](#), as well as local policies.
- Inform MCFLS of any changes to contact information for the organization.
- Review and sign the InfoPass participant agreement.
- Notify MCFLS of intent to withdraw from the program with 30 days written notice.

Expected benefits for participants

- Ability to fulfill patron information needs in a timely manner, typically same-day or next-day service.
- Access to materials from libraries not typically open to the general public.
- Potential expansion of resource sharing services, or other future collaborations.

Governance

InfoPass will be governed by a 5-8 member Steering Committee according to the following composition. Seats designated for particular institutions or library types are filled on a voluntary basis, and may remain unfilled.

- 1 representative from Milwaukee Public Library
- 1 representative from K-12 community
- 1 representative from public university
- 1 representative from private university
- 1 representative from MCFLS
- Up to 3 at-large representatives from the InfoPass community

The Steering Committee will meet as needed. A call for agenda items will be made prior to any steering committee meeting. Meeting materials will be sent at least one week prior. Most issues will be decided upon by a simple majority of those present in the meeting. Items cannot be voted upon unless included as an action item in the meeting agenda. On a tie vote, the motion is lost.

The Steering Committee may take action by written consent via electronic communication if timely action is required prior to the next regularly scheduled meeting. A simple majority of responders is required for an action to pass.

Cost for participation

There is no cost to participate in InfoPass.

Duration and termination of membership

Interested libraries should contact the project manager (MCFLS) to review and sign participant agreement. InfoPass participants may terminate their involvement with notice to MCFLS at least 30 days prior to leaving InfoPass.

Appendix A: Global Policies

1. Issuing library assumes all responsibility for costs of materials damaged or lost.
2. InfoPass will not be honored if more than one week has elapsed since issuance.
3. InfoPass may not be used for items that are available in the issuing library or library system.
4. Substitutions may be made at the discretion of the lending librarian if requested material is not available. The issuing library should be notified of substitutions or additions. Post facto notification is sufficient.
5. Requests from issuing libraries should be fulfilled and ready to be picked up within 24 hours.
6. Return date of material will be set by the lending library. Issuing library may not change local lending periods.
7. Valid photo identification must be presented by the patron at time of material pick up. See local policies for additional requirements.
8. Reciprocity is required to participate in InfoPass. All participating libraries must serve as lenders and borrowers.
9. Billing is the responsibility of the lending library. Bills will be sent by the lending library to the borrowing library InfoPass contact person for processing with the patron.
10. Patrons will be blocked from InfoPass if previous InfoPass loans are not returned or damaged item fees unresolved.
11. Lending library determines formats eligible for InfoPass. Information will be shared in the local library policy directory.

InfoPass Requesting and Lending Workflows

Approved by InfoPass Steering Committee, 1/14/2022

Requesting

1. Verify the patron is in good standing with your library.
2. Verify your local library or library system does not already own the item.
3. Locate the item in the library's local catalog for availability.
4. Verify that the item is available for lending via InfoPass. Check here [\[link to policies, restrictions\], and local library instructions](#) for local policies, format restrictions, hours open, and any building restrictions.
5. Fill out the InfoPass communication form [\[link\]](#). You must identify the following:
 - a. Lending library
 - b. Your library
 - c. Your library email address
 - d. Your Library Address
 - e. Your patron information
 - f. Title, volume, edition, etc. information.
 - g. Permalink to material in local catalog.
 - h. You will be asked to check a box to ensure you have complied with the steps necessary to request materials via InfoPass on behalf of the patron.
6. Upon submitting the form you will receive a confirmation email with your request.
7. Keep a copy of the request sent to the library with the patron information in case the patron does not return material. It is the responsibility of your library to pay for the item if it goes missing. Whether or not you choose to fine/bill your patron is a local decision.
8. Inform the patron they are to call the library before arrival to insure the request has been processed and of any special instructions [\[link\]](#) for entering the building or picking up the item. In addition, inform them they will need a valid form of identification to receive the item. Check the local policies [\[link\]](#) to determine what the lending library considers a valid form of ID.
9. Send patron to the library to retrieve item.

Lending

1. Upon receiving an InfoPass request via email, review request and confirm availability.
2. If the item is not available for checkout, notify the requesting library.

3. If the item is available, create a patron account in your local ILS for the requesting library. An actual barcode is not necessary, but follow your local procedures for patron account creation. Include the following in the record:
 - a. Patron Name - suggested name is INFOPASS-LIBRARY NAME % InfoPass representative's name.
 - b. Library Address
 - c. Library Email
 - d. Library Phone Number
4. Set the item aside and checkout to the library when the patron arrives for pickup.
5. When the patron arrives, they must show a valid form of ID. Once received, check the item out to the library, give the patron the material and notify them of the due date, and any special instructions for returning the materials.
6. Individual libraries may block their own patrons internally from using InfoPass due to standing or misuse of InfoPass. This should be noted by the libraries in their local ILS systems.

Overdue and Billing Notices

1. As materials are checked out to the issuing library, any overdue and/or bill that is generated should be sent to the library. The issuing library is responsible for the return/payment of the material.