



NICE Project: Records Standards

Records Standards Targeted Workgroup Recommendations

The following information shall be required for **Patron Records** in a shared ILS as it is a current requirement for NWLN or V-Cat patron registration forms or for reporting or maintenance purposes:

- Address
- Barcode
- Birth Year (optional but desired)
- Birthdate
- County (optional but desired)
- Date and Initials of Staff that created the record
- Email Address
- Expiration Date
- ID Verified
- Internet Access (broken down by adult, juvenile, and filtered, unfiltered or no internet)
- Municipality (township, village, city, etc.)
- Name (Last name, First Name Middle suffix)
- Parent/Guardian/Responsible Party
- Patron Home or Preferred Library
- Patron wants to receive additional library communications (beyond circulation notices)
- Phone Number(s)
- Preferred form of contact (Notice preference for circulation notices including text message)
- Secondary or Preferred Names (Will need procedures)
- Special Services Indicators (mail-a-book, no OverDrive access)
- Type of patron record (Adult, Juvenile, Institution, School/Teacher, Temp, ILL, etc.)

It is recommended that some of the items listed above could be combined into single fields. For example, Type of Patron Record, and Special Services could be combined into a field similar to the current Patron Type field to be used for authentication, loan rules, and reporting. There may also be value in keeping some fields separate, like Birth Year and County, for statistical purposes. The process outlined in the Collaborative Decision-Making Workgroup's recommendation should be used to determine these future decisions.

It is also recommended that the following fields be maintained and migrated to a new ILS for historical and reporting purposes:

- Patron notes, messages, and manual patron blocks
 - WVLS Horizon registration date
 - WVLS patron alias (If needed in a new ILS)
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- System generated fields (fines, circ activity, number of checkouts, last updated date, etc.)

The workgroup understands the end goal of one patron account per patron for the new consortium. With that target in mind, the workgroup recommends that patrons with accounts in both library systems be flagged with a message to notify library staff of the duplication, so they may offer the patron the choice of home library. Once the patron's choice is confirmed, the accounts will be merged.

The following fields shall be available for **Item Records** in a shared ILS:

- Audience (adult/juvenile/young adult)
- Barcode
- Call number
- Fiction/Nonfiction
- General type of material (book, audiobook, etc.)
- Owning Library
- Price
- Purchase Source
- Specific type of material (hardcover book, Large print book, audiobook on CD, audiobook on MP3, etc.)
- Status
- Suppression options
- Volume information

It is recommended that some of the items listed above could be combined into single fields. For example, Specific type of material and Genre could be combined into a field similar to the current Item Type field to be used for loan rules and reporting. There may also be value in keeping some fields separate, or more broad, like type of material, for statistical purposes. The process outlined in the Collaborative Decision-Making Workgroup's recommendation should be used to determine these future decisions.

In addition, it is recommended that the following fields be maintained and migrated to a new ILS for historical and reporting purposes:

- Item note and messages
- WVLS Horizon created date
- System generated fields (total checkouts, due dates, last check in, check in location, etc.)

Background

Northern Waters Library Service (NWLS) and Wisconsin Valley Library Service (WVLS) are collaborating to engage in a comprehensive joint ILS consortium exploration project. Last year, system and member library staff formed the NICE team to determine the value and feasibility of an ILS merger between the two systems and respective ILS consortia. Based on that information, the team determined that an ILS merger was feasible. LSTA funds are being used to facilitate this second phase of work in which targeted workgroups are being

formed around critical decision points. The workgroups are made up of system and member library staff who have insights, expertise, or perspectives that will help craft recommendations.

Each workgroup uses the NICE Project's [Decision Making Principles and rubric](#). During the feasibility process of the project, the team created a core set of values to apply to future ILS decisions to ensure those shared decisions conform, as much as reasonably possible, to core values. These core values reflect what the NICE project team heard from stakeholders throughout the initial stage of work. Those values were translated into the rubric that is used to guide decision-making.

The Records Standards Workgroup met twice to discuss and compare each systems' current patron and item records as well as discuss the fields needed for current patron registration forms, and the data needed for reporting and collection maintenance. The group's recommendation includes all current standards for both systems as well as some additional fields for patron and item records to be used for reporting and collection maintenance purposes.

Next Steps

This recommendation and all others from the project will be included in a final report, which the NICE team, the respective ILS consortia, and ultimately, the system boards will carefully consider in their decision-making.

Can I Offer Feedback?

Yes! Feedback is welcomed, encouraged, and necessary. Submit your questions or comments using this [form](#), which goes to the NICE Leadership Team. Please indicate that your feedback is related to the ILS selection workgroup recommendation.