

MORE Directors Council meeting information

March 18, 2022

10. Discussion and possible action on CVTC patron records in MORE

Proposed amendment to the [MORE Patron Registration Policy](#), specifically adding the bolded section:

“General notes:

- MORE-member library staff verify an individual’s identity and residence when registering them as a new patron
- Local library policy dictates the methods libraries may use to verify identity and place of residence
- Individuals may have a single MORE library record, **except CVTC students and employees may have both a CVTC patron record and a record created at a MORE-member public library.**”

CVTC patron record requirements

CVTC will re-join MORE in July 2022. The above adjustment to MORE’s Patron Record policy will allow CVTC patron records to function appropriately in the context of MORE, with these requirements:

1. Load CVTC patron data automatically and frequently
2. Upon loading records, allow CVTC patrons to access CVTC and MORE electronic resources, place holds on CVTC and MORE materials, and check out materials at CVTC
3. Upon initial load, disallow checkouts on CVTC patron accounts at other MORE-member libraries until library staff adjust the patron record
4. Make the procedure easy for library staff to understand, follow, and explain. A CVTC patron record is a head start on the MORE registration process. Your library can consider the individual’s identity verified, then staff need to make a few adjustments to the patron record to ensure the account has the appropriate access parameters.

Limitations

- It is not possible to automatically load ACT150 LOC (place of residence) data into patron records
- It is not possible to accurately determine duplication when loading patron records automatically

Understandings

If approved, individuals could have a MORE card previously issued by a MORE-member public library and a CVTC patron account. These users could:

- Have a blocked MORE account and use their CVTC patron account to check out materials at MORE-member libraries
- Have doubled access to limited electronic resources, like ebooks from OverDrive
- Encounter confusion in managing holds, checkouts, and logins between the two accounts

11. Discussion and possible action on MORE cost-sharing formula

[Appendix B of the MORE Participation Agreement](#) specifies the formula for allocating annual MORE costs to member libraries, specifically:

Membership Fee

Member libraries will be charged an annual membership fee based on a cost formula approved by the MORE Directors Council at its November 2010 meeting.

Each library's membership fee will be calculated by:

- adding the library's total number of items in the database plus its total circulation at the end of the previous calendar year.
- dividing that number by the consortium's total number of items in the database plus its total circulation at the end of the previous calendar year.
- multiplying that by the consortium's budget for that year.

For the 2022 MORE Budget (approved in July 2021), MORE Directors Council opted to use a 3-year average of circulation and items owned (rather than 1 previous calendar year) to determine cost allocations. Before the 2023 MORE budget decision in July 2022, MORE Directors Council should decide whether to:

1. Use the formula currently specified in Appendix B,
2. Use a different formula for 2023's MORE cost allocations only, or
3. Amend Appendix B to specify a new cost-sharing formula for 2023 and beyond

For example, Appendix B could be amended as follows:

Membership Fee

Member libraries will be charged an annual membership fee based on a cost formula approved by the MORE Directors Council at its [DATED] meeting.

Each library's membership fee will be calculated by:

- averaging the library's total number of items in the database plus its total circulation at the end of each of the last 3 calendar years
- dividing that number by the average of the consortium's total number of items in the database plus its total circulation at the end of each of the last 3 calendar years
- multiplying that by the consortium's budget for that year.