

Circulation/ILL Advisory Group Minutes

March 13, 2019

Attendees: Nina Haselhorst, Cary; Anastasia Rachmaciej, Park Ridge (attended via phone call); Maggie Rodriguez, Round Lake; Lori Sollenberger, Elmhurst

Absent: Lynn Firman, Lake Villa; Jeff Ray, Morton Grove; Erin Seeger, Northbrook

Also Present: Mieke Fujiura-Landers, CCS

The March 13, 2019 meeting of the Circulation/ILL Advisory Group began around 9:30am.

1. Circulation and ILL Online Training Kit

M. Fujiura-Landers reviewed a sample module of the CCS online learning tool. CCS is currently working on developing online kits for staff to use as on-demand, remote training. Each topic will contain videos, documents, step-by-step activities, and assessment quizzes. M. Fujiura-Landers asked the group for suggestions of Circulation and Interlibrary Loan-related topics. Responses included:

- Registration, both for new cards and re-registering cards (including searching for duplicate patrons and data entry standards)
- Searching for both items/titles and patrons
- Pop-up screens
- Billing, fines, and fees
- ILL (including registering ILL Libraries)
- Holds (including multiple holds, grouping holds, cancelling in-transit holds)
- Outreach topics/Bookclubs
- CCS Policies/System Policies or shared procedures
- Simply Reports (including patron reports, how to ID damaged/lost/missing items)
- Notices (including schedules and running print notices)
- Managing items (for example, how to manage a missing item)
- How to use the staff client

M. Fujiura-Landers also asked for input on in-person training sessions. Attendees agreed that morning sessions are better for their staff. CCS also provides on-site training, where staff from Member Services will travel to a library and lead training.

2. Circulation Procedures Manual Draft

The group reviewed the final section of the revised draft of the Circulation Procedures Manual. This section covers Holds and Notices. The group went through section-by-section to look at verbiage and clarity.

Section 7.0 - Notices originally read, "In July 2017, Governing Board voted that all libraries will offer all notice options, and that patron preference will drive notices." N. Haselhorst suggested clarifying language here. The revised section now reads, "In July 2017, Governing Board voted that all libraries will enable all notice options, and that patron preference will drive notices. Libraries will encourage email and text adaptation to reduce print notice volume."

Section 7.viii - Notice Maintenance included a citation of a staff client report titled, "Email and Text Summary Report." The group did not recognize this report and were unable to locate it in the staff client. M. Fujiura-Landers believes it may either be citing an old report or a mistype and will be removed from the draft.

Attendees also inquired about the last segment of that section on Bounced emails. They don't recall receiving notifications on bounced emails. M. Fujiura-Landers will check with IT about setups for the individual libraries.

M. Fujiura-Landers will make the revisions to the document and bring to the next Circulation Technical Group meeting for review and approval.

3. EXEMPT Patron Code Usage

The group discussed how libraries use EXEMPT patron codes. An EXEMPT patron code is available to libraries for users who may be exempt from fines or have higher checkout limits, like staff personal use cards. Some libraries may have local policies that dictate these cards should only be used locally. In these cases, the database checkout limits have been set up to restrict borrowing privileges at other locations. However, this can affect staff who are also residents of the library where they work. CCS is looking for a best-practice recommendation to give to libraries who want to restrict cards to be local-use only. M. Fujiura-Landers explained that since this is a recommendation, it is not required for libraries to adapt this workflow and is not subject to formal approval from the Technical Group.

The group discussed several workflows, including practices at their own libraries. Two workflow suggestions included issuing a second card to resident staff as their EXEMPT card or having any local-only use agreement be verbal (and not reflected in system settings). After some discussion, the group decided on the following recommendation:

If libraries wish to exercise control over EXEMPT cards through system settings, the recommendation is to issue a second EXEMPT use card for resident patrons. If libraries do not wish to exercise control over EXEMPT cards through system settings, the recommendation is that libraries use a local or verbal agreement with staff over proper use of staff personal use cards.

M. Fujiura-Landers will review the recommendation at the next Circulation Technical Group meeting.

The meeting was adjourned at roughly 11:00 am.

Summary of Next Steps

Who	What	When
CCS	Revise circulation manual draft	March 2020
Circulation Technical Group	Review and vote on circulation manual revisions	Next meeting date TBD
CCS	Review recommendation for EXEMPT patron code at next Circulation Technical Group meeting	Next meeting date TBD