Circulation/ILL Advisory Group Minutes

September 11, 2020

Attendees: Julie Gibson, Crystal Lake; Rosa Lloyd, Indian Trails; Louise Neidorf, Wilmette; Maggie Rodriguez, Round Lake; Rosalie Scarpelli, Palatine; Erin Seeger, Northbrook; Laurie White, Ela

Absent: none

Also Present: Mieko Fujiura-Landers, CCS

The September 11, 2020 meeting of the Circulation/ILL Advisory Group was called to order at 9:33am. The meeting was held via Zoom. M. Fujiura-Landers began the meeting by taking roll, summarizing the purpose of the Advisory Group and the roll of a committee member.

1. Email Notices and Patron Addresses

CCS received a suggestion to remove the patron address field from email notifications. CCS would still need to investigate if this field could be removed from email notices and was interested in a recommendation from the group on whether this field should be removed or not before starting an investigation.

Questions included:

- Would affect patron information sent to collections?
  - Answer: It would not.
- Would this also impact emailed billing notices?
  - Answer: Possibly. CCS would need to investigate if modifications can be done by notice type or if formatting would apply to all emailed notices.
- Would removing the address impact staff's abilities to look up the patron if needed?
  - Answer: Staff would be able to cross-reference using the patron's email address.

One of the group's concerns was adding more to the Advisory Group and CCS's plates for a suggestion by one patron. The group decided not to pursue investigating changes to email notices. A suggestion was given to use a secondary address field to store the patron's address and putting a placeholder address in the primary address field.

2. Patron Record Expiration Alert

Leap displays an expiration alert to staff before the patron's record expiration date *(post-meeting edit: the alert displays 7 days before the patron expires)*. CCS received a suggestion to extend the alert to 30 days before the patron's record expires. Prior to the meeting, M. Fujiura-Landers found that the setting she believed tied into this function did not have an impact on behavior. She will need to investigate further on how to adjust the alert if desired (and if so, can it be adjusted library-by-library). At this time, she was interested in getting the group's thoughts on adjusting the setting based on limitations. A

committee member mentioned some libraries already send an email notice a month ahead of the patron expiration.

Questions included:

- Will this alert pop up every time a member comes to check out until they renew their card (thinking of users who are at the library multiple times a week)?
    - Yes, the alert will appear every time staff open the patron's account during the alert period.
- Will the alert impact patron access on a self-check?
    - It will not prevent a patron from using a self-check, but CCS is not sure if the alert appears on the self-check.
- Do due dates adjust based on patron expiration date?
    - The patron will still get the full checkout period even if their card expires before the item is due.

After discussion, the group felt a 30-day expiration alert would be helpful for patrons. CCS next steps will be to see if this setting is built in or if it's a setting that can be adjusted. If a system-wide setting, the recommendation will be taken to the Circulation Technical Group for approval. If it can be adjusted by library, CCS will allow libraries to set their own limits.

(Post-meeting edit: the patron expiration alert is built in to Leap and cannot be modified.)

3. Auto-Renew/Almost Overdue Notices and Quarantine

CCS previously adjusted Overdue notices to add language on the quarantine period. The Auto-Renew/Almost Overdue notice currently does not include any language related to quarantine. If a patron returns their item early, they may receive an Auto-Renew/Almost Overdue notice while the item is in quarantine. CCS is interested in feedback to see if the Auto-Renew/Almost Overdue notice text should be augmented to adjust quarantine as well.

Committee members reported regularly hearing about confusion from patrons who have returned items and receive notices during quarantine. CCS will add similar language to the Auto-Renew/Almost Overdue notice as is in the Overdue notice.

4. Custom Notices

Notices share system-wide standardized text, as per CCS Policy set by Governing Board. With COVID restrictions, CCS has offered an exception for hold notices due to varying practices for holds pickup. CCS would like to gather input from the committee on custom notices, including if customization should be extended to overdue and bill notices, if custom notices is a short-term or long-term solution.

After discussion, the group felt that custom hold notices were necessary and should be offered through at least Phase 5 of Restore Illinois. Overdue and bill notices should remain system-wide language (with the variation between fine and fine free library verbiage) to maintain a level of consistency for patrons.

5. Addition to Agenda: Overdue Notice Schedule

Currently overdue notices are issued at 10 days past due, 15 days past due, and 28 days past due. Pre-COVID overdue notices issued at 3 days, 15 days, and 28 days past due. CCS interested in input on if 10 days past due sufficient period or if should be expanded.

Questions included:

- How does the long overdue block come in to play for fine free libraries?
  - Fine free libraries typically block when an item is 14 days past due. During COVID, some libraries have expanded the block to 21 days. For libraries who have expanded their block, the block will be applied to the patron's account between the 2nd and 3rd overdue notice.
- How many requests has CCS received to adjust the schedule?
  - So far, two requests.

After discussion, the group decided to keep the first overdue notice at a 10-day schedule. For patrons who have overdue items and may have forgotten about them, the overdue notice is a reminder that they have something that needs to be returned. There was also concern over pushing timeline further as circulation/delivery process currently takes so long. Ultimately, the purpose of overdue notice is to prompt the items back to library. It's difficult to know what each library's level of work or their current process is now, and the overdue notice currently has language on the quarantine period.

The meeting was adjourned at 10:35 am.

Summary of Next Steps

Who	What	When
CCS	Investigate if the patron record expiration alert can be modified.	September 2020
CCS	Add language on quarantine period to Almost Overdue/Auto-renew notice. Publicize to Circ listserv and CCS eNews.	September 2020