MINUTES

Circulation Technical Group
Crystal Lake Public Library
126 W. Paddock Street, Crystal Lake, IL 60014
January 10, 2020
9:30 am

1. **Call To Order –** The meeting was called to order at 9:35 am by Chair K. Hegelund/EVK

2. **Proposed Amendment/Approval of minutes October 11, 2019**:
    Section 5i (CCS Staff Reports, Circulation Manual) of previous minutes amended to:
      Section v: Block and Notes (p.6)
      After a discussion, the procedure was updated to say that staff can add, remove, or alter
      *non-blocking notes for non-local patrons. Adding, altering, or removing **blocking** notes*
      must be done by the patron's library.
    N. Haselhorst/CPQ made motion to approve minutes with amendment. A. Thomas/PHK
      seconds. Motion passed unanimously by a voice vote.

3. **Additions to Agenda/Parking Lot**

4. **Officer Reports**
    - Chair K. Hegelund/EVK welcomed a new Branch Manager, Miguel Ruiz, to the Evanston Public Library team.

5. **CCS Staff Reports**
    - M. Fujiura-Landers welcomes Rachel Fischer as the new Member Services Librarian for Technical Services to the CCS team. She starts on January 20, 2020.
    - M. Fujiura-Landers - Kathleen Weiss, CCS User Experience Librarian, will soon be sharing the results of user experience studies.
    - D. Wischmeyer – Update on Palatine migration to Polaris which is scheduled to happen over Labor Day weekend. CCS libraries will go offline on Saturday, Sept. 5, 2020 and plan to be back online Tuesday, Sept. 8, 2020. There is now a Palatine Migration schedule page in the portal, and updates will also be shared in the CCS News bulletins.

6. **Old Business – None**

7. **New Business**
    a) **Hold Wrapper Standards (Mieko/CCS):** There has been a concern that self-service holds can violate patron privacy. The Governing Board discussed creating CCS standards in November 2019 meeting. In December 2019, the CCS Circ Advisory Group created standards for CCS hold wrappers (known in Leap as Hold Pickup Slips).

- Standards for Hold Pickup Slips are as follows:
  - Libraries with self-service holds must use the Polaris Hold Pickup Slip (hold wrapper) for held items
  - 4 or fewer characters of last name
  - Hold unclaimed date
  - Optional – last 4 digits of library barcode
  - Optional – item barcode
  - No display of patron phone number

- New Hold Pickup Slip configuration will go into effect on **February 10, 2020**. Please put in a CCS Help Desk ticket or email help@ccslib.org.

- Please note:
  - This standard only applies to libraries that have self-service hold shelves. If your hold shelves are in a staff area or behind the desk, this change is not required. Please confirm with CCS if your hold shelf does not require a change.
  - Hold Pickup Slips for drive-up windows can be set differently than the above standards. If you have questions, please put in a ticket with CCS.
  - CCS can run a test in Leap Training Mode to show a slip with 2, 3, and 4 last-name characters for libraries who would like to see this. Simply put in a ticket with CCS.
  - CCS will monitor IL state-wide privacy legislation to make sure that we continue to be in compliance with any changes to the law.
  - A. Thomas/PHK offered to supply info on the best formatting when printing Hold Pickup Slips. See Appendix A.
  - There was a suggestion to use the Staff/Client Outreach Module for privacy. This was briefly discussed. D. Wischmeyer/CCS shared that the Outreach Module will be added to Leap in the next update (6.4).

b) **Circulation Manual Draft Changes (Mieko/CCS)**: Revisions and addition to Sections 3 – 5. M. Fujiura-Landers/CCS reviewed revisions to the following Circulation Manual sections. Revisions were sent to the group with the agenda prior to the meeting.
   - Section 3 Non-CCS Reciprocal Borrowing: L. Papadourakis/DPK moves to approve procedure as amended. V. Sehgal/LNK seconds. The motion passes unanimously by voice vote.
   - Section 4 Resetting Due Dates: L. Papadourakis/DPK moves to approve procedure as amended. K. Bolton/ MUK seconds. The motion passes unanimously by voice vote.
   - Section 4 Staff Expectations: L. Papadourakis/DPK moves to approve procedure as amended. N. Haselhorst/CPQ seconds. The motion passes unanimously by voice vote.

c) **In Transit Damages/Missing Procedures (Mieko/CCS):** M. Fujiura-Landers/CCS reviewed revisions to the In Transit Damaged and In Transit Missing procedures. Revisions were sent to the group with the agenda prior to the meeting.

- Missing In Transit: T. Sergei/LFK moves to approve procedure as amended. A. Herrmann/MGK seconds. The motion passes unanimously by voice vote.
- Damage In Transit: K. Carroll/DUK moves to approve procedures as amended. K. Bolton/MUK seconds. Motion passes unanimously by voice vote.

  J. Maldonado/EVK initiated a discussion concerning whether or not the driver has to pay out of their own pocket for items that are received damaged while in transit. D. Wischmeyer/CCS shared that RAILS does not charge RAILS drivers for items that a library has received damaged, but that CTS, the sub-contractor, may charge the driver for damage.

  L. Firman/LVK asked if anyone is sending out Switch games to other libraries to fill holds (that went Unclaimed) and when the item comes back, the case is returned empty. No one else seems to be having this issue. General reminder to all libraries - please visually verify that all components are present before materials are returned to the lending library.

d) **Information on Receipts/Impacts on Patron Privacy (A. Thomas/PHK):** A. Thomas/PHK noted that some library receipts contain a patron's personal information. M. Fujiura-Landers/CCS and D. Wischmeyer/CCS encouraged all CCS libraries to look at the patron receipts that are generated by their library to see if there is personal information that needs to be removed. If the receipt is generated by a self-check or AMH, please contact the vendor to see if receipt can be modified.

  L. Ward/WLK asked if any libraries were using phenol-free paper for their receipts, as the state of Illinois banned the use of BPA in receipts beginning January 1, 2020.
    - Direct Paper Supply is the vendor for EVK. Click here for the link.
    - POS Paper is the vendor for PHK and DPK. Click here for the link.

e) **Picklist Processing – Staff and Hours Spent (M. Swift/CLK):** M. Swift/CLK wanted to know if any libraries were using "Ask Me Later" in picklist processing, which puts the item on another library's picklist. No libraries are currently using this option. M. Swift/CLK asked if there was a way to determine how many items were added to the picklist in a day. M. Fujiura-Landers looked into this, and could not find an easy way to generate a reliable number using Simply Reports.

  M. Swift/CLK asked how other CCS libraries handle their picklists.
  - M. Brumbaugh/ZBK has a full-time ILL/picklist position.
  - K. Kee/GVK prints the picklist every hour and has the shelvers pull items continuously.

D. Wischmeyer/CCS addressed a general question about how the holds are assigned to picklists in Polaris. She explained that there is a primary cycle, where the system assigns an item to a picklist where there is an "available" status item at the patron's home library. Then there is a secondary cycle, where the system assigns it to the next library with an "available" status item to match the patron's request.

K. Hegelund/EVK brought up the topic of item level holds on the picklist. M. Fujiura-Landers/CCS highlighted a CCS Web Report under the Patron Management section called Item Holds which allows CCS libraries to identify and manage item level holds. This report shows all item level holds in detail and contains two worksheets: Placed by Your Patrons, Placed on Your Items.

f) **Rubber Bands, Labels, and Zip Ties – Oh My! (K. Hegelund/EVK):** K. Hegelund/EVK visited the company (CTS) contracted by RAILS to deliver to libraries covered by the Wheeling hub (XWH). They requested that we do/don't do the following when sending items in transit:
   - Do not use rubber bands to hold multiple items together that are going to the same destination. If the rubber band breaks in transit, there is no way for them to know the destination library for the loose items.
   - Do not cut the thick, white zip ties, as they can be removed using pliers, and then reused by CTS. After removal, staff can leave them in a bin that is being returned. (It is okay to cut the thin zip ties, as they are single use.)
   - Upon delivery, each bin has a library destination label on the outside. Please pull them and put them in a return bin, as CTS can reuse them.
   - Please use markers, not pens, to write the 3 letter library designations.
   - Do not overfill the bins.

   If a library would like to communicate how they would like their bins stacked (no more than 3 high, etc.)/how they want their delivery to be handled, they can take a photo of an ideal delivery and send it to CTS. CTS will keep it on file and use it as a template for future deliveries to that library.

8. Parking Lot
   a) **Lost Items (L. Sollenberger/EAK)**: L. Sollenberger/EAK wanted to know when lost items are deleted from the catalog. Each library determines that time period, and it ranges from "one month" to "never", per D. Wischmeyer/CCS.

   b) **Library Cards with No Expiry Date (M. Brumbaugh/ZBK):** M. Brumbaugh/ZBK is looking into "never-ending" cards. She asked if anyone was using the National Change of Address Database (Unique) on a regular basis, and whether or not other libraries might like to partner with them in order to get the cost down. K. Hegelund/EVK used the service and it cost $750.00 for 50k patrons. Unique does not require that you use their collections service. (Skokie Public Library has non-expiring cards.)

D. Wischmeyer/CCS said that CCS does a monthly patron purge of expired cards, including RPBs, if the patron owes $15 or less and the last activity date is more than three (3) years (unless there are unbreakable links). Each library can delete their own patron accounts that owe fines to their own library at their discretion. "Last activity" in reference to expired cards is defined as last patron-initiated activity, such as placing a hold, accessing a database, paying a fine, checking out an item.

c) **RAILS Routing of Items (K. Bolton/MUK):** K. Bolton/MUK has been receiving items in van delivery for other libraries with 3-letter designations that are close to MUK. She asked if others were experiencing the same issue. Most libraries encounter this occasionally. D. Wischmeyer requested that anyone having an issue should open a ticket with RAILS.

d) **LFK Going Fine-Free (T. Sergei/LFK):** Lake Forest Public Library is going fine-free on February 1, 2020. This brings the total of fine-free CCS libraries to nine (9). For more information, please click here to access the Fine-Free FAQ page in the portal.

9. Adjournment - Chair K. Hegelund/EVK adjourned the meeting at 12:00 pm.

Next Meeting (Same Time, Same Place ☺)
Crystal Lake Public Library
126 W. Paddock Street, Crystal Lake, IL 60014
April 10, 2020

Appendix A.   Printer Setting for Leap Hold Pickup Slips (A. Thomas/PHK)

Destination	Star TSP650 Cutter
Pages	All
Copies	1
Layout	Portrait
Color	Black and white
Paper size	72mm x 200mm
Margins	None
Scale	150

Action Items

Who	Action Item	When
CCS Libraries	Send CCS help desk ticket to amend Leap Hold Pickup Slips to meet new standards.	New standards go into effect February 10, 2020.

Meeting Attendees

Library	Attendees
Algonquin	Belinda Husak
Cary	Nina Haselhorst
Crystal Lake	Julie Gibson, Mari Swift
Des Plaines	Dana Jenkins, John Lavalie, Michelle Meyer-Edley, Laurie Papadourakis
Ela	Lori Sollenberger, Laurie White
Evanston	Kim Hegelund, Miguel Ruiz, Jose Maldonado
Fox River Valley	Keri Carroll
Fremont	Karen Bolton
Glencoe	Absent
Glenview	Karen Kee
Highland Park	Robin Smith
Huntley	Donna Klehr, Denise Wahl
Indian Trails	Absent
Lake Forest	Tori Sergei
Lake Villa	Lynn Firman
Lincolnwood	Ruchi Sharma, Vandana Sehgal
McHenry	Barb Majka
Morton Grove	Amanda Herrmann
Niles-Maine	Athena Crouse
Northbrook	Erin Seeger
Park Ridge	Matthew Hoffman,
Prospect Heights	Ann Marie Thomas
Round Lake	Alisha Smaby
Wilmette	Luciano Ward
Winnetka-Northfield	Absent
Zion-Benton	Mollie Brumbaugh, Kelley McCoy
CCS	Mieko Fujiura-Landers, Debra Wischmeyer
Visitors	None