

ILL Technical Group Meeting

January 23, 2020

Lake Villa District Library

1. **Call to Order:** 9:31 a.m.
2. **Approval of Minutes:** T. Letrich (Park Ridge) motioned to approve the meeting minutes from October 24, 2019. J. Kennedy (Lake Forest) seconded. Minutes approved.
3. **Reports:**
 - a. **Chair: Jackie Janavicius (Lake Villa)**
 - i. Welcome to Lake Villa's new building! Tours were provided after the meeting.
4. **CCS Staff Reports: Debra Wischmeyer & Mieko Fujiura-Landers**
 - a. **New CCS Staff Member:** Welcome to Rachel Fischer, the new Member Services Librarian for Technical Services!
 - b. **Exciting News:** Grayslake Area Public Library has been approved by the Governing Board to join CCS! They will go live along with Palatine Public Library on Labor Day weekend.
5. **New Business:**
 - a. **Identifying Holds for ILL (Stale Holds):** Holds may become unfillable if the only available copies are marked as Lost, Missing, Repair, etc. There are several ways to identify these holds:
 - i. **Request Manager:** In Polaris Leap, old ILL holds can be found through the Request Manager. Filter by "Status: Unfillable" to view. The Convert to ILL feature can be used directly from the Request Manager.
 1. Click on any column header to sort by that column.
 2. Expired holds will display in the patron's record for two weeks before disappearing.
 - ii. **Weekly No Eligible Items for Holds (Web Report):** This report lists active holds that are not able to be filled by CCS items. It displays both the item and patron barcodes, as well as the Hold Request ID number which is searchable through the Polaris Find Tool.
 - iii. **Old Holds (Web Report):** This report shows holds for your patrons that have been lingering for 30 days or more.
 1. In Process and very popular items commonly appear on this report. Check the Expiration Date to identify older holds.

- b. **Review of Holds Data:** M. Fujiura and D. Wischmeyer showed the group a PowerPoint presentation with recent CCS research regarding picklist volume and hold patterns over time.
 - i. Although circulation of physical material continues to trend downwards, there is an overall increase in the number of holds being placed. The amount of hold activity varies significantly between libraries.
 - ii. CCS staff reviewed Polaris holds settings to confirm there were no changes in recent months, but did not find any discrepancies.
 - iii. As new libraries are added to CCS, we will continue to see an increase in holds across the system.
 - iv. CCS will continue researching hold and circulation trends, including possible actions libraries can take to capitalize on the increasing popularity of holds as a service.
 - v. Most libraries have a hold pickup limit around 150, though some have smaller limits. If you would like to adjust your hold limits, please send a help ticket to CCS.
 - vi. The PowerPoint is available through the Governing Board. Ask your director if you are interested in reviewing it.

- c. **Discussion of Picklist Flow:** The group discussed how their libraries manage picklist processing, including staff involved and the amount of time spent searching for items.
 - i. Most libraries run the picklist once or twice a day, spending an average of 1-2 hours searching for items.
 - ii. A few libraries run the picklist five or more times per day, including Glenview, Evanston, and Lake Forest.
 - iii. **Fill Now:** This is an option available through the patron record in Polaris. If an item is the same title but not the same barcode as shown on the picklist, the hold may not trap automatically. Fill Now will allow you to trap the hold directly.
 - 1. The Fill Now option is intended to give some flexibility in filling holds and can also be helpful with accidental item level holds. However, it can be tricky if the bibliographic records are different.
 - iv. **Library Testing:** CCS would like to visit several libraries to test picklist processing and establish a baseline for how long it takes to pull items. They will test various factors to help figure out how to make the process more efficient.
 - 1. Evanston and Des Plaines have both volunteered.
 - 2. CCS would also like to visit a smaller library so they can test different volumes. Please contact CCS if you are interested.
 - 3. The testing will be done in March or April.
 - v. **Unclaimed Holds:** CCS will speak to the Circ/ILL Advisory Group about standardizing hold pickup times.

- d. **ACTION ITEM – ILL Library Record Standards:** When creating a new ILL library account in Leap, if the library is outside of RAILS or out of state the recommendation is to add the library’s 3-letter OCLC code.
 - i. M. Rodriguez (Round Lake) made the motion to vote, which was seconded by K. Hegelund (Evanston). A vote was taken, with all in favor. The motion passed.
 - ii. Most libraries in our delivery route should already be in the database. CCS double-checks that RAILS delivery codes are entered correctly in library accounts.
 - iii. Old accounts will need to be cleaned up. If you would like to fix them when you come across them, please go ahead.
 - iv. **RAILS delivery label standards** (per the RAILS website):
 - 1. For IL libraries in our consortium or delivery route (XWH), use an approved RAILS label.
 - 2. For IL libraries outside of our delivery route, use an ILDS label.
 - e. **Discussion on CTL Tour Takeaways:** Library staff who visited CTL to tour their facility shared what they learned with the group, including several requests from CTL.
 - i. Please do not use rubber bands to stack items together. Each item needs its own RAILS label.
 - 1. Using rubber bands to help secure paperwork on ILDS items is fine, as long as items are not stacked together.
 - ii. Always fill out the “From” field on the RAILS labels.
 - iii. Write clearly in thick pen or marker. Light pen can be difficult for the CTL staff to read when sorting.
 - iv. CTL can reuse the thicker zip ties and outer bin labels. Please put them back in the blue bins when packing.
 - f. **Nintendo Switch Game Issues:** Round Lake has noticed a sudden increase in the number of Switch games that are sent through CTL delivery and received with the game cartridge missing from the case. Discussion ensued on possible causes and solutions.
 - g. **Book Club Requests:** Please remember to put the book club date in the Hold Request under Staff Display Notes.
6. **Meeting Adjourned:** 11:03 a.m.
M. Rodriguez (Round Lake) made the motion to adjourn, which was seconded by K. Hegelund (Evanston).

Next Meeting: April 23, 2020 @ Park Ridge Public Library

Action Items:

Who	What	When
M. Fujiura, CCS	Continue researching hold and circulation trends.	Ongoing
M. Fujiura, CCS	Conduct library visits to test picklist processing.	March/April 2020
M. Fujiura, CCS & Circ/ILL Advisory Group	Discuss standardizing hold pickup times.	March 13, 2020

Library	Attendee(s)
Algonquin	Wendy Theehs
Cary Area	Susan Boldt
CCS	Mieko Fujiura, Debra Wischmeyer, Rachel Fischer
Crystal Lake	Mari Swift
Des Plaines	Angy Walker
Ela	Laurie White, Karen Brown
Evanston	Kim Hegelund, Jose Maldonado
Fox River Valley	Keri Carroll
Fremont	Karen Bolton, Joyce Cumberland
Glencoe	Absent
Glenview	Karen Kee, Yelena Dereka
Highland Park	Absent
Huntley	Donna Klehr, Denise Wahl
Indian Trails	Absent
Lake Forest	Jeanie Kennedy
Lake Villa	Jackie Janavicius
Lincolnwood	Absent

McHenry	Laurie Rex, Bonnie Niepsuj
Morton Grove	Absent
Niles	Absent
Northbrook	Absent
Park Ridge	Tony Letrich
Prospect Heights	Ann Thomas, Sophia Bochula, Betty Shubeck
Round Lake	Maggie Rodriguez, Alisha Smaby, Jian Rao
Wilmette	Amy Jung
Winnetka	Absent
Zion-Benton	Paula Pavelski, Bob Bigden-Russell

Officers:

Jackie Janavicius, Lake Villa, Chair

Jeanie Kennedy, Lake Forest, Vice Chair

Alisha Smaby, Round Lake, Secretary