# **Circulation/ILL Advisory Group**

# **Agenda – September 9, 2022**

# **Zoom, 9:30 a.m.**

Meeting Access Information:
URL: <https://us02web.zoom.us/j/89948880391?pwd=Q1dCN0xoWmZVcFZWS2toYjZCWFlHQT09>
Meeting ID: 899 4888 0391
Passcode: 098839
Dial-In: +1 312 626 6799

1. **Call to order** 1 min
2. **Welcome and Icebreaker**  10 min
3. **Additions to the Agenda**   1 min
4. **Old Business**
	1. None
5. **New Business**
	1. Overview of Circulation/ILL Advisory Group (DISCUSSION) 10 min
		1. Review advisory group member job description and decision-making matrix
		2. Review meeting dates for FY22-23
	2. Interlibrary Loan and Item Editing Permissions (ACTION) 20 min
	3. Children of Separated Parents and Multiple Library Cards (ACTION) 15 min
	4. Migration Training (DISCUSSION) 20 min

**Adjournment**

**Next meeting: Friday, December 9, 2022 (9:30am), Zoom**

All matters on the agenda may be discussed, amended and acted upon

**5a. Overview of Circulation/ILL Advisory Group**

 Advisory Group Member Job Description

Advisory groups consult with CCS on potential system configuration changes, assist with research and testing, and recommend policy changes and best practices to their associated technical groups.

Advisory group members are expected to:

1. Use their expertise and knowledge to represent the CCS community
2. Participate in 4 advisory group meetings per year
3. Participate in 4 associated technical group meetings per year
4. Engage in online, asynchronous conversation and research between meetings
5. Work with CCS staff to present findings and recommendations as needed.

Interested staff can self-nominate, or directors can nominate on behalf of their library. All participants must have director approval.

## **Decision Matrix for ILS Setting or Procedure Changes**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|   | **Governing Board**  | **Technical Group**  | **CCS Staff**  | **Advisory Group**  |
| 1. No change to workflow AND
2. No financial or HR impact
 | Informed  | Informed  | Approve  | Recommend  |
| 1. Change to workflow AND
2. No financial or HR impact
 | Informed  | Approve  |   | Recommend  |
| 1. Financial or HR Impact OR
2. Addition of service OR
3. Policy change
 | Approve  | Recommend  |   | Recommend  |

Specific responsibilities for each advisory group are outlined below.

## **Circulation/ILL**

7 Members

The Circulation and Interlibrary Loan Advisory Group partners with CCS staff to refine documentation, consults with CCS staff on configuration changes, researches and recommend policy and best practice changes to the Circulation and Interlibrary Loan Technical Groups. CCS Staff Liaison: Member Services Librarian, Public Services

## **SCRAP**

7 Members

SCRAP (Standard Cataloging Rules and Practices) researches and discusses cataloging best practices and recommends changes in standards or policies to the Cataloging and Metadata Management technical group.

CCS Staff Liaison: Member Services Librarian, Technical Services

## **User Experience Advisory Group**

9 Members

Formerly the PAS Advisory Group, the User Experience Advisory Group is expanding to be cross-departmental. Staff from any department working with PAC customization, mobile apps, or other patron-facing tools are eligible to participate.

This group will work with the CCS User Experience Specialist to enhance user experience across CCS, based on qualitative and quantitative user research. This may include: consulting with CCS on configuration changes, recommending new standardization of patron-facing elements, refining documentation related to PAC customization and best practices.

CCS Staff Liaison: User Experience Specialist

# **Database Management Committee**

14 Members (4 Technical Services, 4 PAS, 2 Circ, 2 IT, 2 administrators)

Database Management Committee will meet twice yearly minimum to discuss requests for new policies, including but not limited to:

1. Material types
2. Item stat codes
3. Loan period codes
4. Fine Codes
5. Patron Codes
6. Patron Stat Classes
7. Collections

CCS will present a recommendation for each new policy request to Database Management Committee. The Committee will approve upon a simple majority of the members present.

Elements to consider when a request for a new policy has been made:
8. Is there overlap with existing policies?
9. Do these items need to be treated uniquely from existing collections?
10. How does this change affect the patron experience?
11. How does this change affect the staff experience?
12. Does this policy have longevity?
13. Will there be widespread adoption of the policy across the consortium?
14. Will libraries be required to use the new policy?
15. Will retro work need to be done? Will CCS staff or individual libraries be responsible for completing this work?

Database Management will also research and analyze other system-wide policy or practice changes that would impact multiple areas of service.

CCS Staff Liaison: Member Services Manager

Approved May 2019
Updated June 2020

## **2022-2023 Circulation/ILL Advisory Group Meeting Dates**

All meetings will be held virtually via Zoom

* Friday, September 9, 2022 (9:30am)
* Friday, December 9, 2022 (9:30am)
* Friday, March 17, 2023 (9:30am)
* Friday, June 9, 2023 (9:30am)

# **5b. Interlibrary Loan and Item Editing Permissions**

**POTENTIAL ACTION**

**TO RECOMMEND ADDING ITEM EDITING PERMISSIONS TO THE ILLBBM PERMISSION GROUP**

**Background**
Staff who are part of the ILLBBM permission group (Interlibrary Loan/Books By Mail) have permissions to access the ILL tab in the Leap Request Manager, modify an ILL request record, receive the request, return and delete the request.

Once an ILL request is received, a temporary item record is automatically created for the ILL item. However, the ILLBBM permission group does not include permission to edit item records. Permissions to edit item records are currently limited to the following permission groups:

* Cataloging 1 (also allows staff to edit bibliographic records; perform item bulk changes; delete item and bib records)
* Public Services Item Editing (also allows staff to perform item bulk changes)
* Circulation Managers (also allows staff to bulk change patron records; remove deposits)

The topic of adjusting the price of an ILL item has come up in recent ILL Technical Group meetings. An item price can be assigned in a couple ways:

* A default price is applied based on values in the ILL item template or ILS settings
* Or, staff add a price to the item record

Staff who have item editing permissions can perform the latter and can add a price to the item record. Staff who are part of the ILLBBM permission group but do NOT have item editing permissions will not be able to add a price to the item record.

CCS is interested in a recommendation on if ILLBBM group permissions should be modified to include item editing permissions or if the permission group should remain as-is.

**Why can this be a barrier for staff?**
The price of an item can vary widely and will not always be reflected in the default price. Typically, libraries use a default price of either $25 or $100 for ILL item records.

If the item becomes Lost **and the ILL item record does not have a price assigned**, Polaris will apply the default to the bill. In 2021, 11,817 items with a material type of ILL Material were checked out; 71 items became Lost.

Again, staff with item editing permissions can enter the true price of the item in an ILL item record. Staff who do not have item editing permissions will not be able to enter the true price of the item.

**In addition to price, what else would staff be able to edit?**
Staff would have the ability to edit most fields under the item record “Details” tab. In addition to price, this also includes fields such as assigned/owning branch, collection, and shelf location. The permission cannot be scoped to just ILL item records; staff would have the ability to edit these fields in all item records assigned to their library.



**If adding the item editing permission to the ILLBBM group, how many staff would be impacted?**
As of August 28, 2022, there are 628 staff who are part of the ILLBBM permission group. Of these 628 staff, 576 (roughly 92%) are also in a group with item editing permissions. 52 staff (roughly 8%) are not part of a group with item editing permissions. A list of staff with ILLBBM permissions and their item editing permission status [can be accessed here](https://ccsliborg.sharepoint.com/%3Ax%3A/s/CCSTraining/ERwatL3ZyFxOgJNgs-z1WvQB9QRjzmD475-pxa-tph-B6Q?e=j95p34).

|  |  |  |
| --- | --- | --- |
| **Total Staff with ILL Permissions** | **628** | **100%** |
| ILL + Item Editing Permissions | 576 | 91.72% |
| ILL (no item editing permissions) | 52 | 8.28% |



**What are the options going forward?**
There are two options we are looking at:

1. Add item editing permissions to the ILLBBM group. With this option, any staff who is part of the ILLBBM permission group will be able to edit the Details tab for items assigned to their library.
2. Leave the ILLBBM permissions as-is. With this option, libraries can continue to add staff to an existing permission group with item editing permissions as needed.

# **5c. Children of Separated Parents and Multiple Library Cards**

**POTENTIAL ACTION**

**TO RECOMMEND REVISIONS TO “USERS WITH MULTIPLE LIBRARY CARDS” TO CIRCULATION TECHNICAL GROUP FOR APPROVAL**

### **Background**

A previous Circulation/ILL Advisory Committee discussed situations where users could potentially have multiple cards in the database, such as owning multiple properties or children of separated parents, and whether or not a patron in these situations can have multiple cards within CCS. The group was unanimous that there are valid situations in which a patron should have multiple cards in the database.

There are no existing statutes that deny an owner of multiple properties from receiving a card from each library they pay taxes to. Additionally, there are no state statutes relating to library card access for children of separated parents; access is up to local library policy. CCS consulted with the State Library and RAILS several years ago when first researching these situations and are reaching out again to re-verify.

An entry was drafted for the Circulation Manual, approved by the Circulation Technical Group, and officially added to the manual. However, the entry does not explicitly mention children of separated parents and this particular situation has recently come up again.

CCS is interested in a recommendation from the group on a revised entry to the Circulation Manual in order to address children of separated parents. If recommended, the revision will go to the Circulation Technical Group for approval.

**Revised Entry to the Circulation Manual**
Drafted revisions are in **red.**

2.xii Users with Multiple Library Cards
Staff should refer to [Section 3050.70 Non-Resident Property Owner and Leasee](https://www.ilga.gov/commission/jcar/admincode/023/023030500000700R.html) of the Illinois Administrative Code.

Per this statute, an individual who owns or leases property that is taxed for library service in multiple library service areas may receive a card from each library. This may include the property owner or persons who rent (“lease”) the property, **or children of separated parents who each reside in different library service areas**. ~~According to the Illinois State Library,~~ There is no prohibition in statute that would deny an individual paying taxes to two or more libraries from receiving a library card from each. **Library card access for children of separated parents can be determined by local library policy.**

Libraries may issue a separate card to a user with an existing account if that user owns or leases property within the library’s service area. **Libraries may also issue a separate library card to a child of separated parents if the child has an existing account at a different library and such access follows local library policy**. The patron will essentially have two or more home library cards and accounts in the database. Libraries should adhere to local policy for issuing cards (example: local policy may state that non-resident taxpayers may be issued one card per household).

# **5d. Migration Training**

### **Background**

CCS is anticipating using a blended training strategy during future library migrations. This strategy would incorporate both synchronous in-person training and asynchronous self-guided online training. We have not before migrated a library using blended training and need to figure out the most effective approach. Additionally, we would like to be able to provide recommendations for internal training to the incoming libraries.

The [CCS Online Courses](https://www.ccslib.org/online-courses) will give an idea of training and topics that are covered during a migration.

### **Questions for Discussion**

1. What did your libraries do or provide for internal training during the 2017-2018 migration? For example, did staff train together or was training set up as a more independent activity?
2. Who led or coordinated your internal training? For example, did each department determine their own training needs, or was there a central team that coordinated training for all departments?
3. What from training did you find particularly effective or helpful?
4. Looking back, what would you have done differently with training?
5. Are there topics that you find are more suited to in-person training?
6. Are there topics that you find more suited to self-guided training?
7. When approached with a new software/tool, do you find it helpful to explore on your own before getting formal training? Or, do you prefer to receive formal training and then explore the software/tool independently?