# **Circulation/ILL Advisory Group Minutes**

September 9, 2022

**Attendees:** Bob Bigden-Russell (ZIK); Kim Hegelund (WLK); Belinda Husak (ALK); Rachel Quan (LVK); Alisha Smaby (RLK); Ann Marie Thomas (PHK); Courtney Volny (WNK)

**Also Present:** Karen Bollman (PAK); Mieko Fujiura-Landers (CCS); Debra Wischmeyer (CCS)

The September 9, 2022 meeting of the Circulation/ILL Advisory Group was called to order at 9:30am. The meeting was held via Zoom.

Recording was paused for a group icebreaker activity.

## 1. Overview of Circulation/ILL Advisory Group

M. Fujiura-Landers reviewed the job description and expectations of Advisory Group members, the CCS decision making matrix, and the Circulation/ILL Advisory Group meeting schedule for FY22-23.

## 2. Interlibrary Loan and Item Editing Permissions

The ILLBBM permission group does not include item editing permissions. Adding item editing permissions to the ILLBBM group would allow ILL staff to edit most fields in the item record Details tab for items assigned to their library. Most staff who are in the ILLBBM permission group are also part of a group that comes with item record editing permissions; roughly 8% of staff in the ILLBBM permission group do not have item editing permissions. CCS is looking for guidance on whether ILLBBM permissions should be expanded to include item editing permissions or if the permission group should remain as-is.

A committee member asked if the 8% without item editing permissions was represented by a single library. The 8% represents more than one library, but you will find staff in both the ILLBBM permission group and an item editing permission at most CCS libraries. A committee member asked if this topic has gone to the catalogers’ group for discussion. The topic has not been discussed at a catalogers’ group yet. Some staff who are in the ILLBBM permission group do not have a need to edit item records. The group agreed that their preference is to have the ability to add item editing permissions via a separate group rather than automatically give permissions to all ILLBBM staff.

The decision was made to leave the ILLBBM permission group as-is; no motion was put forward.

## 3. Children of Separated Parents and Multiple Library Cards

Section 2.xii (“Users with Multiple Library Cards”) of the Circulation Manual addresses situations where users may have multiple library cards in the database, such as cases where the patron owns multiple properties in different library service areas. However, this section does not explicitly call out the ability to issue multiple cards to children/dependents of separated parents if the parents live in different service areas. No Illinois statutes currently prohibit patrons or children in these situations from having more than one library card; CCS is re-verifying this with RAILS and the State Library. *[Confirmation from RAILS received 9-14-2022.]*

The group reviewed a drafted revision to Section 2.xii that includes mention of children of separated parents. The group changed the term “children” to “dependent” in order to be inclusive of adults under parental care. The group briefly discussed situations about issuing cards if the dependent has an existing card at a different library that is blocked. The language in the draft allows for libraries to apply local policy and gives the library the agency to decide if the dependent should be issued a card.

A. Thomas (PHK) moved and R. Quan (LVK) seconded to recommend the drafted changes to Circulation Manual Section 2.xii “Users with Multiple Library Cards.”

**Ayes:** B. Bigden-Russell (ZIK); K. Hegelund (WLK); B. Husak (ALK); R. Quan (LVK); A. Smaby (RLK); A. Thomas (PHK); C. Volny (WNK)
**Nays:** None

The motion passed. M. Fujiura-Landers will take the recommendation to the next Circulation Technical Group meeting for formal approval.

## 4. Migration Training

CCS is starting to think about what the future of training would look like during a migration and anticipates using a blended strategy, which incorporates both in-person, synchronous training and online, asynchronous activities. The advisory group discussed their libraries’ approaches to training during the 2018 migration and after. Major discussion points included:

* Libraries used a blended training approach during the 2018 migration; they provided in-person training and also had independent activities for staff to complete
* It’s important to have multiple staff be knowledge experts for a service area in case there’s a leave-of-absence
* Train-the-trainer is effective when training an entire library; this allows a library to take foundational concepts and apply local culture and nuance to training
* It’s helpful to have time to explore new software or tools before formal in-person training; this gives staff an opportunity to become familiar with the basic layout of the software

B. Bigden-Russell (ZIK) moved and R. Quan (LVK) seconded to adjourn the meeting. The meeting was adjourned at 10:47 am.

## **Summary of Next Steps**

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| **Who** | **What** | **When** |
| CCS/Advisory Group | Bring recommendation to approve drafted changes to Circulation Manual Section 2.xii “Users with Multiple Library Cards” to Circ Tech Group for approval | October 2022 |