# **Circulation/ILL Advisory Group Minutes**

September 15, 2023

**Attendees:**  Jazmin Bravo (PRK); Danny Burdett (GCK); Athena Crouse (NIK); Kim Hegelund (NBK); Matthew Hoffman (WLK); Belinda Husak (ALK)

**Absent:** Bob Bigden-Russell (ZIK)

**Also Present:** Mieko Fujiura-Landers (CCS); Brent Michalski (MJK)

The September 15, 2023 meeting of the Circulation/ILL Advisory Group was called to order at 9:34am. The meeting was held via Zoom.

M.Fujiura-Landers shared a corrected draft of the June 9, 2023 minutes ahead of the meeting. There were no additional revisions. Minutes accepted as submitted.

There were no additions to the agenda.

## 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 FY23-24.

## 2. Manual Item Recovery in CCS Libraries

The committee reviewed drafted guidelines on manual item recovery for clarity, as per direction from Executive Committee:

*Polaris will issue an automated bill notice when an item reaches 45 days overdue. If a library intends to manually contact patrons over billed items in addition to automated notices, efforts should be limited to patrons registered to their library or non-CCS reciprocal borrowers who checked out from their location. The library should not contact patrons registered to another CCS library.*

A. Crouse (NIK) shared data from manual item recovery efforts at Niles-Maine. K. Hegelund (NBK) asked about an option for bill notices to be issued in print only, or a report for items about to be billed if a library wanted to send letters. M. Fujiura-Landers (CCS) recommend the Daily Search Shelves report. B. Husak (ALK) said Algonquin workflow is to use the report to check shelves ahead of the item bill being issued. The Daily Notice Delivery Report will give an idea of bill volume at your library.

K. Hegelund (NBK) moved and D. Burdett (GCK) seconded to accept drafted guidelines for manual item recovery as written.

**Ayes:** Jazmin Bravo (PRK); Danny Burdett (GCK); Athena Crouse (NIK); Kim Hegelund (NBK); Matthew Hoffman (WLK); Belinda Husak (ALK)
**Nays:** None

The motion passed. M. Fujiura-Landers (CCS) will add guidelines to the Circulation Manual and other relevant documentation.

M. Fujiura-Landers (CCS) asked what information would be helpful for libraries to have in a report for manual item recovery. The committee shared suggestions for report output. M. Fujiura-Landers (CCS) will work with R. Barth (CCS) to draft a report for manual item recovery that fits the approved guidelines and will share with the group via email to review. Guidelines and a start date to adopt guidelines will be announced at the October Circulation Technical Group meeting.

## 3.Patron Record Single Name Only

M. Fujiura-Landers (CCS) reviewed and demoed a new Polaris setting that would allow staff to save patron records using a single name field. If enabled, the setting would either be enabled system-wide for all CCS libraries or just be enabled for the ILL for Cooperative Computer Services branch. The committee discussed enabling for the ILL branch as a separate recommendation.

### Enable Single Name Only for the ILL for Cooperative Computer Services Branch

Since institutions registered to the ILL for CCS branch follow a naming convention, CCS would be able to bulk update first, middle, and last name fields for existing records into a single field if this setting is enabled.

K. Hegelund (NBK) tested this feature in training and found it data entry and searching to be easy. Some committee members who do not work with ILL Libraries expressed interest in hearing from ILL staff on potential disadvantages. J. Bravo (PRK) and D. Burdett (GCK) both work with ILL and/or consulted with ILL staff at their library and think the change is more intuitive. D. Burdett (GCK) asked about potential downsides when searching for single name patrons vs patrons with conventional names. The Quick Search Box and Find Tool are indexed in a way that allows searching both name conventions without issue. K. Hegelund (NBK) noted a benefit when working with universities that have multiple libraries. The single name field will be labeled as “Last Name” but would serve as the mononym.

J. Bravo (PRK) asked about use of the Single Name Only checkbox. The committee agreed that the checkbox should be used if entering a patron with a single name only. K. Hegelund (NBK) asked how this setting would impact online PAC card registrations. If single name only is active, the first name field will not be a required field in the online form.

J. Bravo (PRK) moved and M. Hoffman (WLK) seconded to recommend enabling single name only setting for the ILL for Cooperative Computer Services branch.

**Ayes:** Jazmin Bravo (PRK); Danny Burdett (GCK); Athena Crouse (NIK); Kim Hegelund (NBK); Matthew Hoffman (WLK); Belinda Husak (ALK)
**Nays:** None

The motion passed. M. Fujiura-Landers (CCS) will take the recommendation to the February ILL Technical Group for approval. At the December Circ/ILL Advisory meeting, the group will discuss what ILL library naming conventions will look like moving forward.

### Enable Single Name Only for All Other CCS Branches

Since libraries may use different conventions for patrons with mononyms or institutions, CCS would not be able to apply a global update and would instead need to work individually with libraries if cleanup is desired.

K. Hegelund (NBK) noted using a single name field would be helpful for in-house cards and school cards. B. Husak (ALK) asked what a hold slip looks like if a user has a single name. The name prints as the last name on a hold wrapper, but there would be no first or middle initial. J. Bravo (PRK) asked what a single name would look like from the patron end. The group looked at an example in the training PowerPAC and verified that patrons are not able to edit their own name in the PowerPAC. A. Crouse (NIK) mentioned their library has a handful of patrons with mononyms and this setting allows libraries to be more culturally sensitive.

M. Fujiura-Landers (CCS) clarified that if enabled for all libraries, all libraries would have the option to use the single name setting but would still follow local procedure for inputting names. When thinking about potential concerns, K. Hegelund (NBK) mentioned using National Change of Address services with mononyms.

Committee members felt relatively neutral on the setting but will recommend taking it to Circulation Technical Group for further discussion.

J. Bravo (PRK) moved and D. Burdett (GCK) seconded to recommend enabling single name only setting for all other CCS branches.

**Ayes:** Jazmin Bravo (PRK); Danny Burdett (GCK); Athena Crouse (NIK); Kim Hegelund (NBK); Matthew Hoffman (WLK); Belinda Husak (ALK)
**Nays:** None

The motion passed. M. Fujiura-Landers (CCS) will take the recommendation to the October Circulation Technical Group for discussion and approval.

## 4. MessageBee Automated Non-Blocking Note for Bounces

The MessageBee automated non-blocking note would say *“[DATE] - Notification to [###-###-####] bounced.”* This message cannot be modified. The committee agreed automation is helpful. B. Husak (ALK) asked when the message would be applied? M. Fujiura-Landers believes it would be applied when the bounce is detected but will verify. There is the assumption that libraries will continue to follow procedures for reviewing and updating patrons whose notices bounced so patrons will not be subject to multiple bounce alert notes. A. Crouse (NIK) asked about the message text. There would be no indication if the bounce issue is due to an incorrect phone number or other condition from just the non-blocking note. J. Bravo (PRK) clarified that staff can still log in to the MessageBee portal and get information about the individual bounces.

J. Bravo (PRK) moved and K. Hegelund (NBK) seconded to recommend enabling the MessageBee automated non-blocking note.

**Ayes:** Jazmin Bravo (PRK); Danny Burdett (GCK); Athena Crouse (NIK); Kim Hegelund (NBK); Matthew Hoffman (WLK); Belinda Husak (ALK)
**Nays:** None

The motion passed. M. Fujiura-Landers (CCS) will take the recommendation to the October Circulation Technical Group for approval.

D. Burdett moved and K. Hegelund (NBK) seconded to adjourn the meeting. The meeting was adjourned at 10:40 am.

## **Summary of Next Steps**

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| **Who** | **What** | **When** |
| CCS | Develop report to be used with manual item recovery | October 2023 |
| CCS | Update circulation manual and documentation to incorporate manual item recovery guidelines | October 2023 |
| CCS | Bring committee recommendation to enable single name setting for CCS branches to the October Circulation Technical Group meeting | October 2023 |
| CCS | Bring committee recommendation to enable MessageBee automated non-blocking note to the October Circulation Technical Group meeting | October 2023 |
| Circ/ILL Advisory Group | Discuss name conventions for the ILL for Cooperative Computer Services branch | December 2023 |
| CCS | Bring committee recommendation to enable single name setting for the ILL for Cooperative Computer Services branch to the February ILL Tech Group meeting | February 2023 |