**Circulation Technical Group Agenda**

**In Person**

**April 11, 2025**

**In Attendance:** Belinda Husak (ALK), Cheryl Allen (CPQ), Mari Swift (CLK), Dana Jenkins (DPK), Michelle Meyer-Edley (DPK), John Lavalie (DPK), Karen Brown (EAK), Laurie White (EAK), Gabriela Mansera (EVK), Keri Carroll (DUK), Karen Bolton (MUK), Karen Kee (GVK), Jurga Mackoniene (GVK), Meredith Bernhardt (GLK), Rosa Lloyd (WGK), Donna Ramirez (WGK), Tori Sergel (LFK), Stephanie Haugan (LNK), Jeffrey Ray (MGK), Shawn Cherian (MGK), Janine Wisniewski (MPK), Rachel Martin (MPK), Athena Crouse (NIK), Kim Hegelund (NBK), Donna Beach (NBK), Rosalie Scarpelli (PAK), Jennifer Sobel (PAK), Anastasia Rachmaciej (PRK), Ann Thomas (PHK), Alisha Smaby (RLK), Dustin Smaby (VEK), Cathy Sokley (WRK), Kris Nichols (ZIK), Mieko Fujiura-Landers (CCS)

1. **Call to order**: 9:57 am
2. **Approval of minutes from last meeting**

Motion to approve: Ann (PHK)

Seconded: Anastasia (PRK)

1. **Additions to the agenda**

\*What apps do you use to have staff call off? Other than text messaging.

1. **Icebreaker –** Mentimeter.com polls
	1. Cake (19) vs Pie (8)
	2. Vacation Style: Beach (11), Staycation (7), City (6), Camping (3)
	3. What do you listen to in the car? Music (14), Audiobooks (7), News (3), Podcast (2), Nothing (1)
	4. Morning People (19) vs Night Owls (10)
	5. Dogs (14) vs Cats (6) vs Can’t choose! (9)
	6. Favorite Takeout: Chinese, Pizza, Mexican, and Thai
2. **Officer reports**
	1. Chair - Nothing
	2. Vice Chair - nothing
	3. Secretary - nothing
3. **CCS staff reports**
	1. **IP Address Restriction:** Starting March 18th, the Staff Client will be restricted to library IP addresses only (LEAP access will not be impacted). If staff are working remotely, they will need to access the staff client via library VPN. If there are any changes to a library’s IP address in the future, libraries will need to open a help desk ticket to update with CCS.
	2. **Discovery Layer Project:** In the process of evaluating Vega Discover, Aspen, and Bibliocore as potential discovery layers. Links to info and demo recordings available on CCS website (<https://www.ccslib.org/training/library-online-catalog-evaluation-project>). Next steps: review feedback from Database Management, CCS staff, and member library staff to form a recommendation for the Governing Board’s May decision. No timeline on when new discovery layer might be implemented.
	3. **Vernon Migration Update:** Migration team is hard at work! CCS is currently building Vernon library and branches into the Polaris database. Staff will see them start to appear on drop down lists, but Vernon should be suppressed everywhere they can be suppressed until go-live. Libraries should continue to register Vernon patrons as non-CCS reciprocal borrowers. The Leap Training database will be unavailable during the Vernon test data load (April 28th – May 16th). Offline period scheduled over Labor Day weekend, with the plan for CCS libraries to come back online Tuesday, September 2nd.
4. **Old Business** - none
5. **New Business**
	1. **Circulation Technical Group Meeting Change- CCS (PRESENTATION)**  Beginning in July 2025, meetings will shift to Thursdays. Plan for the 2nd Thursday in July, October, January, and April. Final dates will be shared as soon as they are confirmed. Tentatively, the next meeting will be Thursday, July 10th. Will still alternate between in-person and zoom. The new schedule will also apply to the Circ/ILL group.
	2. **Officer Elections - (DISCUSSION):** Officers for next year:
		1. Secretary – Athena (NIK)
		2. Vice Chair – Tori (LFK)
		3. Chair: Belinda (ALK)
	3. **Inactive Patron Notice - CCS (PRESENTATION):** Optional notice that can be sent to patrons registered to your library who have been inactive for “x” days. This notice uses patron last activity date (the list of activities that will update this field can be found in the Circulation manual) to determine inactivity. Libraries can customize the notice text. The notice will be triggered whether or not the patron card is expired, and will be sent even if the patron has a bill on their account. It looks solely at the “last activity date” – not notes, blocks, or bills. The automatic report will only send e-mails – if you wanted to mail notices to inactive patrons, you would have to pull the information some other way.
		1. If you’re interested in turning on Inactive Patron Notices, open a ticket with CCS
		2. Reminder: Libraries can use either “last activity date” or “expiration date” for the annual patron purge (either 3-year inactivity or 3-year expiration)

Staff can create a report in Simply Reports that will generate a list of inactive patrons that includes their expiration date and money owed:

**Simply Report setup** - **generate list of inactive patrons that includes their expiration date and money owed**

* Report category: patron report
* Report sub-category: patron list report
* Output:
	+ Your desired patron info (barcode, patron ID, email address, phone, address, etc.)
	+ Patron last activity date
	+ Patron expiration date
	+ Patron acct charges
* Sort:
	+ Whichever sort that will be most helpful depending on how you're using the report
* Filters:
	+ General > Patron branch > select your library
	+ Patron Relative Date Filters > Last activity date more than = x- months/years before report run date
* Want to save the report and run it on-demand or on a schedule? [Click here for how-to](https://www.ccslib.org/training/saving-and-scheduling-report).
* CCS can also set up the report to be delivered regularly via email! After saving the report, [publish it to the staff client](https://www.ccslib.org/training/publishing-reports-client), and open a help desk ticket (help@ccslib.org).

Libraries can use either last activity date or expiration date for purges. (either 3-year inactive or 3-year expiration).

If you’re interested in turning this on, open a ticket with CCS.

* 1. **Do any other libraries have "limited use" cards they issue out to patrons who can't show the proper identification/proof of address to get a full access library card?– Janine Wisniewski (MPK) (DISCUSSION)**
		1. WRK: Offer a Limited Use card to people who can’t show picture ID or proof of residency. Allows the patron to check out up to 5 print items at a time and provides access to online resources. 90-day expiration. Renewed on case-by-case basis.
		2. DPK: Have many local residential programs (Merryville, sober house, shelters, etc). Keep a list of addresses that are exceptions. If a patron comes in with proof they are living at one of those addresses, will issue a full-access card with a 1-year expiration.

* 1. **Intra-CCS Damaged Items Review- CCS (PRESENTATION)**
		1. How-To Page on CCS website (How-to 🡪 Department- Public Services 🡪 Patron Accounts 🡪 Damaged Item Procedures)
		2. How-To page outlines exactly what to do if a patron returns a damaged item TO YOUR LIBRARY. Breaks it down by various categories.
		3. If a patron is present and acknowledging the damage, take care of the situation in the moment.
		4. If there is a situation where you are unsure about the level of damage, contact the owning library to consult. Send photos if e-mailing. If the owning library wants to look at the damaged items, how-to page outlines the steps to take to get that item back “home” without triggering any other holds.
		5. The owning library should not apply any charges without consulting the return library.
		6. More rare situation: You do not own the item, the patron is not your patron, and the item was not checked out at your library. Essentially, all you are is the point of return. Consult Section C: Work with CKO library, get the item back to *them* to work through situation with the patron.
		7. There is a separate process to follow for items received damaged via the RAILS bins. If you received something damaged in the RAILS bins, but the damaged was not caused by RAILS, contact the library where item was returned – it is their responsibility to contact the patron and manage replacement charges.

* 1. **What and how to change app and eBook access when you have to change patrons card number- Tori Sergel (LFK) (DISCUSSION)**
		1. You need the login credentials for your library in order to access the ability to merge/update card numbers in overdrive and various other services.
		2. If the patron’s old number is not saved in the “former barcode” field, you can also use the training database to retrieve the patron’s old card info.
		3. There is a web report that lists patrons whose card numbers changed: “Patrons Added/Removed”

* 1. **Library Showcases**
		1. **Morton Grove passport and license plate renewal services (Shawn Cherian, MGK):** Started Passport Services last October. Has been a big hit with patrons, lots of positive feedback. The hardest part was getting the State Department to respond to their request to offer services. Just had an audit with State Department – passed with flying colors. They were nervous about offering, but has been one of the best services they’ve added. Schedule up to 5 staff on the desk on the weekends to accommodate passport appointments, and has brought in significant revenue (library gets to keep $35 execution fee).Thank you to the libraries who provided input throughout process. License plate renewals have also been a big hit – usually see a big increase in those around the end of the month. also a big hit – usually see increase around the end of the month. They use ELS for license plate stickers – best part of using ELS is they have a hotline you can call to work through issues with renewal in real time. The average license plate renewal takes less than 3 minutes.
		2. **Lake Forest Vending Machine (Tori Sergel, LFK)**

New vending machine! At the train station on the other side of town. Used to have DVD-to-go machine, but patrons wanted “more,” so now expanded to vending machine. Made it a branch to make moving materials around more easily. Can change the images on machine and(in theory) place holds in vending machine, but are not allowing holds yet. So far the experience is going well. Got machine through International Library Service [AutoLend Library](https://www.internationallibraryservices.com/library_automation_technology/autolend-library/.%20). It took a long time to get the vending machine, and then to get it up and running – they had previously worked with standalones only, so it took some work to adjust the settings to a shared catalog. Currently, staff are re-stocking the vending machine once a week and collecting returned material.

1. **What apps to people use to call off?**  Looking for alternatives, out of FOIA concerns. Most libraries reported that they just use text messaging with staff. Northbrook said they have a Sick Line that staff can call before library hours, and then any messages left on that line get passed on to department managers.

Most people just using texts.

1. **Adjournment**:
	1. Motion to adjourn: Kerri Carrol (DUK)
	2. Seconded: Karen Bolton (MUK)
	3. Meeting adjourned at 11:30am

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